



eBook

The 2026 Playbook for Contract AI

Real-world use cases to accelerate
contract workflows

AI has everyone talking, as it carves new paths forward across roles, industries, and the globe. One of its most promising breakthroughs? The contract process. Contract AI is transforming a complex, time-consuming discipline into a fast-paced revenue driver, helping teams work faster, cut out tedium, and surface insights.

There's no shortage of AI and contract technology on the market. In fact, there's so much out there that explorations into tools leave those responsible for contracts with more questions than answers: Which platforms have the biggest impact? What's the right order for implementation? Where do I even start?

If you're overwhelmed by how to approach the AI transition, let this be your guide. What follows are some of the most powerful ways to use contract AI, based on real-world client successes.

Organized by five common use cases across legal, procurement, and sales, this guide covers everything from contract requests to customer renewals. See what's possible and how to join the AI era with confidence.

Legal

- 1 Search and storage
- 2 Request, review, and redlining





1 Search and storage

Spend less time digging through contracts and more time acting on insights

The challenge

Growing businesses have their hands full of contracts across multiple lines of business and geographies. Legal's most common challenge in managing this huge volume often stems from a commonly heard constraint: the lack of a centralized, searchable repository.

All too often, organizations have contracts scattered across systems—email, shared drives, local storage, and more. Without a cloud-based shared system and smart search capabilities, tracking down contract details is time-consuming, frustrating, and expensive. The consequences of this lack of immediate visibility bleed into the rest of the business:

- **Slow insights:** Siloed contracts and manual searches make it hard to find specific terms, answer questions, and access critical information. They also hide revenue opportunities like renewals and more attractive terms.
- **Extra costs:** If a regulatory or policy change applies to a set of company contracts, legal may even have to hire outside counsel or other resources to dig through files and pull out the affected agreements. The costs quickly add up, as does the pressure to meet the change deadline.
- **More interruptions:** Without a shared, up-to-date contract repository, legal teams become the default gatekeepers, fielding status requests that disrupt their workflows and pull them away from their core work.
- **Heightened risk:** Scattered contracts can increase compliance risks, as legal has limited visibility into active obligations. This can result in disputes, penalties of **around 14% of total contract value**, and outdated terms in future negotiations.

The role of contract AI

An AI-powered repository stores all agreements in one place. More importantly, it intelligently organizes and tags them, so legal teams can:

- **Find contracts and terms in seconds:** No more manual hunts through shared folders or third-party tools to find a counterparty name, the latest data protection agreement (DPA), or an AI addendum. Contract AI lets legal use natural language queries to zero in on specific information in agreements.
- **Keep stakeholders informed at every stage:** No more duplicated files, version confusion, and unauthorized access. With a single, secure agreement repository, legal can quickly answer questions, stakeholders can find what they're looking for, and everyone can see data-backed reports.
- **Take proactive action:** To ensure that no contract milestone goes unnoticed, legal can set alerts and notifications for renewals and other key events, or trigger alerts based on key date searches. This automation and organization gives them the time to approach new opportunities fully prepared.

“I save so much time. All our files are on one platform, and I’m no longer the keeper of it all. Anybody can go in and find a document as easily as I can.”

Carmen Warfield,
Deputy Clerk
San Miguel County Board

The Result?

A more efficient legal department, lower compliance risk, and actionable insights to inform future negotiations.

Now legal can answer questions like:

- How many active MSAs does my organization have?
- Which customers have NDAs with us?
- Do we need a new DPA or can we amend an existing one?
- Which agreements contain language about limitation of liability?

Learn more about our [AI-powered repository](#). Centralize executed agreements and transform them into structured, searchable data for quick audits, easy compliance, and powerful insights.



2 Request, review, and redlining

Organize and accelerate contract requests—while keeping stakeholders in the loop

The challenge

The road to signatures has many stops. When contract requests come in from stakeholders across the business—and legal's only tools are disparate and manual—the journey becomes longer, riskier, and less collaborative. Here's what that looks like:

- **Fragmented workflows:** Agreement requests enter inboxes, Slack, and shared drives. Drafts get started in Teams, emails, or legacy tools. To move contracts forward, legal teams have to toggle between fragmented documents and platforms, slowing progress, producing inconsistencies, and increasing the chances of lost requests and contracts.
- **Repetitive tasks:** Without automation, legal has to track versions, copy data, and chase approvals—draining resources and delaying deals. Already, attorneys spend **roughly 25% of their time** on administrative tasks.
- **Visibility gaps:** Scattered contract generation, redlining, routing, and approvals make it difficult for legal to ensure that all requests are fulfilled and stakeholders are kept involved and informed.

It's a process destined to be inefficient—lacking transparency, consistency, and accountability. Requests slip through the cracks. Stakeholders fall out of the loop. And legal teams are so consumed managing logistics that there's little time left for higher-impact work.

The role of contract AI

AI and workflow automation streamline the contract lifecycle, from the moment legal receives a new contract request to its final approval. By centralizing intake, standardizing generation, and speeding up reviews, an intelligent agreement platform replaces a fractured process with one that's cohesive and smooth. Here's what you can do:

- **Provide self-serve contract generation to business teams:** To start, an AI-driven platform empowers business teams to fulfill new requests without involving legal. When provided with a few details from an email or other communication, AI can recommend the appropriate intake form, which then determines the correct contract template. Self-serve accelerates contract generation, saving the legal team's time for the most nuanced, high-stakes cases.
- **Speed up negotiations with intelligent redlining:** Throughout drafting, AI makes agreements more efficient and consistent with preapproved language, automated data population, and built-in business rules. Once the contract is filled out, AI-powered review can highlight any third-party terms that don't align with company playbooks. With automation and quick analysis, AI accelerates negotiations, cuts out back-and-forths, and speeds up signatures.
- **Make contract workflow oversight effortless:** With AI for routing workflows, the agreement generator can tag appropriate parties from the legal, business, finance, procurement, sales, and security sides for approval—instead of sending separate emails. Automatic status updates and version history keep stakeholders informed.

“We can move a document from generation to being fully executed and stored compliantly in our legal repository in under an hour. That's critical for month-end closings, quarter-end deadlines, and helping customers get loans funded on time.”

Melissa Foster, Senior Vice President and Content Services Consultant

First Citizens Bank and Trust Company

The Result?

Fewer steps, faster cycles, consistent contracts, and scalable legal capabilities.

Now legal can answer questions like:

- Which stakeholders need to review this contract?
- What contracts can be generated by other internal stakeholders using standardized templates?
- Does the contract comply with our approved playbooks? How can we revise outlier terms?
- How can internal stakeholders easily stay on top of statuses—without putting more work on legal?

Learn more about how Docusign [Agreement Desk](#) and [AI-Assisted Review](#) are reducing cycle times and increasing efficiency with smart, automated approvals and clear audit trails.

Procurement

- 3 Supplier intake and orchestration
- 4 Vendor agreement management





3 Supplier intake and orchestration

Shorten the time-to-value and ensure compliance with easy supplier validation and onboarding

The challenge

Adding new suppliers to the procurement ecosystem is an essential part of growth—and a slow vendor contract cycle is an immediate barrier. Without a smart, centralized platform, procurement teams struggle to prioritize needs, vet partners, and track progress to signing. The trouble starts when stakeholders submit requests for vendor contracts—but it extends to negotiations, internal approvals, and purchase orders. Here's what happens:

- **Slow partnerships:** Everyone from sales to HR to operations sends requests to procurement for new supplier partnerships. But because requests come in through disparate channels like Slack or email—without the full context—it's hard for procurement teams to know which requests are most important and time sensitive. Downstream, it leads to uninformed negotiations and prolonged supplier setup.
- **Low transparency:** A contracting process spread across different platforms limits visibility into statuses, comments, approvals, and beyond. It means more manual tasks—from routing to keeping stakeholders in the loop—weaker negotiation positions, and suboptimal decisions about the overall supplier strategy.
- **Stakeholder frustration:** The cycle is as frustrating for the people requesting contracts or purchase orders as it is for procurement teams. Stakeholders don't know who to ask, what process to follow, or how to get a status update. When requests disappear into a black hole, it slows supplier intake and impacts team and organizational performance.

It's no wonder procurement often feels overwhelmed by manual processes, conflicting versions, vague requests, and slow approvals on the way from contract request to signature. Without AI, automation, and a single location for all supplier activities, the goal of shorter cycles, faster negotiations and onboarding, and quicker time-to-value is out of reach.

The role of contract AI

In procurement workflows, AI streamlines intake, centralizes negotiations, and accelerates approvals. Here's what procurement teams can do:

- **Simplify intake for supplier requests:** When a new supplier need arises, any requester can easily start an agreement by email. An AI contract agent then analyzes the request, creates a trackable task, and suggests the best intake form, even prepopulating it with data from the email. No more frustrating back-and-forths. The AI-powered dashboard cuts out legwork.
- **Save time with unified collaboration:** In one collaborative hub, reviewers redline, comment, and edit. AI analyzes contract language against predefined playbooks, flagging issues and suggesting markups and all activities are automatically captured. Key parties can see the agreement status, owners, document versions, approvals, messages, and other critical information. Less time spent on status updates and compliance means there's more time for bringing agreements over the finish line.
- **Boost visibility and accelerate onboarding:** With AI insights and automation, procurement can manage the entire supplier onboarding lifecycle—from identification to qualification to and risk assessment—in one place with no code, less manual effort, and fewer delays. It's a bird's-eye view that keeps stakeholders on the same page throughout and sets suppliers up for success.

“Procurement is a huge part of Avis Budget Group’s mission... We now have the ability to centrally store all our contracts, proactively manage them, and use seamless workflows powered by artificial intelligence.”

Neal Jeffs, Senior Director of International Procurement

Avis Budget Group

The Result?

For procurement teams: instant visibility, thorough vetting, reduced risk, and faster time-to-value for critical needs. For stakeholders, effortless agreement initiation and automated real-time updates.

Now procurement can answer questions like:

- What is the context behind this new supplier partnership?
- Which supplier contract request should I address first?
- What is the status of this ongoing negotiation?
- Who needs to approve this purchase order before we can move forward?

Learn more about how Docusign **Agreement Desk**, a collaborative AI-powered hub, automates procurement workflows and accelerates supplier value.



4 Vendor agreement management

Mitigate risk and avoid contract breaches with centralized vendor oversight and analysis

The challenge

Completing contracts is one thing, but tracking obligations is an entirely different and crucial challenge. Each vendor agreement comes with its own timeline, terms, and obligations. These include payments, renewals, regulatory compliance, service-level commitments, reporting, delivery standards, performance, and beyond. Tracking all these details and holding vendors accountable are essential to realizing a contract's full value.

It's also a huge burden when done manually. With decentralized data and limited oversight, obligation management is time-consuming and error-prone, which can strain relationships and leave dollars on the table:

- **Lost value:** Manual processes and disorganized spreadsheets open the door to lost contract ROI. Without a consolidated view of terms, procurement teams risk overlooking vendor deliverables, credits, and standards. A fragmented view also prevents procurement from seeing opportunities to make strategic shifts in their partnerships, such as consolidating contracts, dropping unused services, or tapping into economies of scale.
- **Increased risk:** Losing track of ongoing obligations also increases a business's risk of breaching payment deadlines, industry standards, and data privacy obligations. This can result in suspended services, penalties such as audits and fines, and damage to the brand's reputation.
- **Harmful auto-renewals:** Among the most important overlooked clauses are autorenewals. When procurement lacks a real-time understanding of upcoming renewal dates, vendor contracts can silently roll over, locking the business into outdated pricing structures, timelines, and offerings.

To create organization and clarity out of contract chaos, procurement needs not only efficient storage but also intelligent automation, which can surface important obligations and keep procurement, finance, and legal informed.

The role of contract AI

An AI-embedded contract platform gives procurement teams early insight into important obligations so they can stop fighting fires and start making informed, strategic decisions. Here's what they can do:

- **Quickly find key supplier information:** All vendor contracts go into a unified searchable system. AI extracts critical metadata on renewals, payments, penalties, and more. Procurement can access reporting on spend, performance, and other metrics to see where every dollar is going.
- **Stay ahead of renewals and deadlines:** AI-powered technology puts procurement back in the driver's seat. Instead of scrambling to keep an eye on scattered contracts, procurement teams get rules-based notifications of upcoming payments and renewals. Early notice lets them analyze their vendor strategy and make proactive choices about whether to terminate, renew, or renegotiate contracts for more favorable terms.
- **Recover buried value:** AI lets procurement visualize vendor-specific terms—without opening each document manually. With their complete contract portfolio at their fingertips, procurement teams can identify savings opportunities, from consolidating multiple contracts with one vendor to negotiating volume discounts.

“Because of the visibility of having all contracts in one place, we can share with executives more details about which contracts have expired, which products were purchased that didn't have a good return on investment, and which business requester was responsible for it. We gained a lot of visibility for renegotiation in that sense with the procurement team.”

Senior director of enterprise applications

Forrester, The Total Economic Impact™ of DocuSign CLM

The Result?

More predictable cash flow, fewer unforeseen costs, simpler compliance, intentional renewals, and smarter decisions about vendors.

Now procurement can answer questions like:

- When is our next invoice due?
- What are our termination rights with this vendor?
- Do we want to renew our relationship or change our terms with this supplier?
- Is this vendor living up to their timing, quantity, and quality obligations?

Learn more about how **DocuSign** helps procurement teams centrally manage and analyze all vendor contracts for a more effective vendor strategy.

Sales

5 Sales agreement generation





5 Sales agreement generation

Supercharge deal velocity with seamless contract creation and tracking

The challenge

In a competitive market, the last thing sales teams need to worry about is contract logistics. In the ideal scenario, these valuable agreements flow from opportunity to signature with simple drafting, transparent approvals, and seamless CRM integration. Unfortunately, this is rarely the reality.

Sales agreement generation is often manual, based on customer calls, scattered data, emailed approvals, and storage on shared drives or individual seller computers. It's a process that slows deals and frustrates sellers from start to finish:

- **Deal delays:** To get a customer agreement started, sellers have to dig through shared folders to locate the latest template that matches their customer type and deal requirements. Then they must copy the template and manually input information specific to their deal from the CRM. Not only does this waste time, but it also puts sellers at risk of entering inaccuracies, such as outdated pricing or product information.
- **Manual errors:** Sales has to manually set up fields, fix formatting, and catch any data errors before finally sending the agreement off. Even the step of emailing PDF attachments of the agreement to signers is tedious and vulnerable.
- **Spotty records:** Once customers sign and return the contract, sellers have to upload it to the CRM and update any relevant information within this sales source of truth. To keep the sale moving quickly, sellers sometimes forget this important step, leaving signed agreements in inboxes and inaccurate data in the CRM. Failure to properly store and update information leads to longer-term problems: last-minute scrambles, missed renewal deadlines, and compliance risk.

With agreements buried in inboxes or shared drives and sellers shouldering the manual burden of agreement generation, the sales process stays fragmented—with inefficiencies that can add up to **\$1.5 million in missed revenue per company on average.**

The role of contract AI

AI transforms the sales agreement workflow, fast-tracking deals, empowering sellers, and creating more strategic negotiations. A smart, unified platform doesn't just centralize and organize sales templates and signed contracts. It can sync with CRM systems like Microsoft Dynamics, Oracle Netsuite, and Salesforce; automate routing; and allow sellers to work in one place. Here's what sellers can do:

- **Create a simple, fast seller experience:** Sales teams with advanced contract capabilities report an average of **29% fewer contracting-related deal delays**. By using AI-recommended templates, preapproved language from legal, and accurate customer data, they can create ready-to-sign agreements with just a few clicks.
- **Boost data integrity and collaboration:** Instead of insecure PDFs, contracts are sent out with encrypted multichannel delivery and electronic, ID-verified signatures. Sellers stay within the systems they're used to—and integrations with productivity tools like Slack, Microsoft apps, and Google let them keep a full real-time record of stakeholder input.
- **Automate archiving and preview opportunities:** Signed contracts go directly into the CRM, creating a single, reliable source of truth for every deal. No more data mismatches and entry mistakes. AI provides analysis and notifications of upcoming renewals. For sellers, DocuSign research found that over **70% of sales leaders** credit AI-powered agreement management tools for decreasing time spent on contracting and deal execution.

“Our sales reps love it because they can **get deals done faster, with fewer errors**. My team loves it because we can manage templates and make changes much easier than with our previous solution.”

April Larsen, VP of Sales Operations

Tipalti

The Result?

Faster deals and renewals, better preparation for negotiations, and more precise tracking.

Now sales can answer questions like:

- Are these product SKUs accurate?
- What is the latest sales template for this type of MSA?
- Does the CRM include our most recent contract with this customer?
- Has legal already approved this language, or do I need to send the contract for review?

Learn more about how **DocuSign IAM for Sales** gives sellers the tools to move quickly and strategically, closing deals and pursuing new opportunities.

Tap into the full potential of contract AI with the Docusign IAM platform

Contract AI is changing the game for teams and functions throughout organizations and across the globe, from risk management to negotiations to sales momentum and beyond. And Docusign is leading the movement with Intelligent Agreement Management (IAM), an AI-powered approach to creating, committing to, and managing contracts.

The Docusign IAM platform cuts through outdated contract processes to turn static agreements into actionable intelligence. With centralized data, workflow automation, real-time insights, and full visibility, IAM puts AI at the core of your contract workflows. Teams get to leave manual tasks behind and spend more time on the work they were trained to do. Organizations get to unlock buried agreement value, minimize risk, and accelerate revenue.

Learn more about Docusign IAM to see what your team can gain from centralizing and connecting your agreement work on an AI-powered agreement management platform.

Or, talk with someone from Docusign about how your team can use IAM.

Book time with one of our experts today.



About DocuSign

DocuSign brings agreements to life. Over 1.7 million customers and more than a billion people in over 180 countries use DocuSign solutions to accelerate the process of doing business and simplify people's lives. With intelligent agreement management, DocuSign unleashes business-critical data that is trapped inside of documents. Until now, these were disconnected from business systems of record, costing businesses time, money, and opportunity. Using DocuSign IAM, companies can create, commit, and manage agreements with solutions created by the #1 company in e-signature and contract lifecycle management (CLM).

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