

RenewSure – Smart Contract Expiry & Renewal Tracker

Industry: Legal / Business Services

Target Users: Contract Managers, Legal Teams, Business Owners, Compliance Officers

Project Type: Salesforce CRM Implementation

Problem Statement

Many businesses lose revenue and face compliance risks due to missed contract renewals, duplicate entries, and a lack of automated alerts. Without a proper system, managers only realize the issue once it's too late. The current manual methods provide little visibility into upcoming expiries or renewal trends.

RenewSure solves this by automating contract expiry alerts, preventing duplicates, sending timely reminders, and giving managers clear dashboards to track contract health.

Phase 1: Problem Understanding & Industry Analysis

1. Requirement Gathering

Business Needs

- Automate contract expiry reminders and escalations.
- Prevent duplicate contract entries with unique Contract IDs.
- Provide managers with dashboards for active, expiring, and expired contracts.
- Reduce dependency on manual follow-ups for renewals.

Functional Requirements

- Auto-generate unique Contract IDs and validate duplicates.
- Send emails for: contract creation, 15-day renewal reminder, final expiry alert, and escalation if overdue.
- Provide dashboards for Active, Expiring Soon, and Expired contracts.

Non-Functional Requirements

- Reliable and scalable automation for contract lifecycle.
- Simple, user-friendly interface for contract managers.
- Secure handling of client and contract data.

2. Stakeholder Analysis

- Contract Manager: Creates and manages contracts, receives reminders.
- Legal Officer: Ensures compliance and handles escalations.
- Business Owners/Managers: Track contract status through dashboards.
- System Admin: Configures flows and maintains Salesforce org health.

3. Business Process Mapping

Current Manual Flow

- Contracts stored in spreadsheets or files.
- No reminders, so renewals are often missed.
- Duplicate entries cause confusion.
- Follow-ups are handled manually by email or phone.

Proposed Automated Flow in Salesforce

- Contracts created with unique Contract IDs (no duplicates).
- System sends a confirmation email when a contract is created.
- 15-day reminder emails are sent before expiry.
- Expiry alerts are sent on the due date.
- Escalation emails go to managers if contracts aren't renewed.
- Dashboards track Active, Expiring, Expired, and Renewed contracts.

4. Industry-Specific Use Case Analysis

- SMEs & Startups: Avoid missing renewals with automatic alerts.
- Legal Firms: Maintain compliance by preventing expired agreements.
- IT/Service Providers: Manage high volumes of service contracts efficiently.
- B2B Companies: Build trust with clients through timely renewals.

5. AppExchange Exploration

- Conga Contracts: For advanced contract management.
- DocuSign CLM: For e-signatures and lifecycle management.
- Reminder Utilities: For customizable alert systems.
- Decision: Use Salesforce-native tools (Flows, Validation Rules, Apex Batch Jobs, Dashboards) to keep the project simple and independent of external apps.