

FREE RESOURCE · CONTRACT INTELLIGENCE

# Contract Obligation Checklist.

The obligations, dates, risks and signals to identify in any contract before they become problems. Use this before signing, after receiving, or when picking up an existing agreement.

Most contract problems are not discovered during legal review. They surface weeks or months later — when a notice period is missed, an obligation goes untracked, or a clause nobody read creates an unexpected commitment. **This checklist covers what to look for before that happens.**

## THE OBLIGATION CHECKLIST

### 01 · Parties & Authority

- Legal name of each party confirmed
- Signing authority verified for each party
- Correct entity identified (not a trading name)
- Related parties or guarantors identified

### 02 · Key Dates & Deadlines

- Commencement and end date recorded
- Renewal or rollover date identified
- Notice period for termination noted
- Review, reporting, or payment dates captured
- Any milestone or delivery dates extracted

### 03 · Your Obligations

- All deliverables and outputs listed
- Reporting or approval requirements identified
- Compliance and conduct obligations noted

### 04 · Their Obligations

- What the other party is committed to deliver
- Service levels or performance standards defined
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- Confidentiality or IP obligations captured
- Payment obligations and terms confirmed

- Their payment or fee obligations noted
- Access, resources, or dependencies identified

#### 05 · Termination & Exit

- Grounds for termination by each party noted
- Notice requirements and method confirmed
- Consequences of early exit understood
- Post-termination obligations identified

#### 06 · Risk & Liability

- Liability caps or exclusions identified
- Indemnity obligations noted
- Insurance requirements confirmed
- Dispute resolution process understood

### RISK SIGNALS TO WATCH FOR

#### WATCH CLOSELY

- ⚠ Auto-renewal clauses with short notice windows
- ⚠ Broad IP assignment or licence grants
- ⚠ Unilateral variation rights held by the other party
- ⚠ Vague scope or deliverable definitions
- ⚠ Payment terms that shift liability onto you

#### NEEDS ATTENTION BEFORE PROCEEDING

- ✗ Unlimited liability or uncapped indemnity
- ✗ Non-compete or restraint clauses
- ✗ Obligations that depend on undefined third parties
- ✗ Conflicting terms between documents
- ✗ Missing or unclear dispute resolution pathway

### THE PROBLEM THIS CHECKLIST SOLVES

Identifying obligations is only the first step. The gap between knowing what a contract commits you to and actually tracking it in real work is where most problems occur. The checklist surfaces the obligations. The question then is what you do with them.

**1**

#### Extract every obligation into a plain-English list

Restate each obligation in plain language — who is responsible, what they must do, by when, and what triggers it. This becomes your operating register for the contract.

**2**

#### Assign an owner to each obligation

Every obligation needs a named person responsible for it. If no one owns it, it will not get done. For small organisations this may be you for everything — but it still needs to be explicit.

**3**

#### Get key dates into a calendar or tracking system

Notice periods, renewal windows, reporting deadlines and review dates should be in a system that creates reminders well in advance — not in a document that gets filed and forgotten.

**4**

#### Flag anything that needs a decision before you proceed

If the checklist has surfaced a risk signal or an obligation you are not sure you can meet, that needs a decision before the contract is signed or before work begins under it.

### NEED HELP TURNING YOUR CONTRACT INTO STRUCTURED OUTPUTS?

#### CLARITY

**\$235**

per contract

- ✓ Plain-English contract summary

#### INTELLIGENCE

**\$355**

per contract

- ✓ Everything in Clarity

#### ADVANCED

**\$495**

per contract

- ✓ Everything in Intelligence

- ✓ Key obligations snapshot
- ✓ Key dates identified
- ✓ Risk awareness notes
- ✓ Practical operating implications

- ✓ Structured obligations register
- ✓ Calendar-ready key dates
- ✓ Dashboard-ready dataset
- ✓ Operational notes

- ✓ Expanded obligations register
- ✓ Expanded risk notes
- ✓ Negotiation & recommendation notes
- ✓ Tracking setup guidance

## Have a contract that needs turning into something usable?

Send it through, choose the level of support you need, and get structured outputs back within 48 hours.

[Start your contract review →](#)