



Suhas Bhairav

AI Obligation Tracking Playbook

Automate obligation extraction and tracking for contracts with auditable workflows.

A practical playbook to automate contract obligations while preserving human review where needed.

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suhasbhairav.com

What to automate in obligations

Identify the things that can be reliably captured by AI from contracts. Reserve human review for interpretation, risk judgments, and unusual terms.

Key move Start with a small set of contracts to validate accuracy before rolling out.

PRACTICAL CHECKLIST

- 01** Automate extraction of obligations, owners, deadlines, and renewal terms from contracts (e.g., NDAs, licenses) using clause-type classifiers.
- 02** Capture notice periods and triggering events to support proactive renewals and escalations.
- 03** Assign owners and accountable stakeholders to each obligation.
- 04** Store evidence of completion and status updates in the contract CMS.
- 05** Identify dependencies between obligations (e.g., linking renewal to vendor performance reviews).
- 06** Tools and data needs: CMS, OCR, NLP extractor, integration layer, audit-ready storage.

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Weekly adoption plan

Adopt in small weekly increments. Start with a pilot of standard contracts, then expand to complex agreements.

Key move Pilot with a small contract set; document learnings before scaling.

PRACTICAL CHECKLIST

- 01** Week 1: Define obligation taxonomy, owners, and data sources; align with existing CMS fields.
- 02** Week 2: Run AI extraction on a pilot contract set; add manual validation rules.
- 03** Week 3: Implement CMS fields for obligations, owners, deadlines, and renewals.
- 04** Week 4: Enable reminders and escalation paths; test trigger conditions for notices.
- 05** Week 5: Capture evidence of completion; build audit trails in the CMS.
- 06** Week 6: Review performance metrics; finalize governance roles and sign-off criteria.

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Risk, approvals, and metrics

Define guardrails, required approvals, and ownership for automated obligation tracking. Specify measurement methods and procedures for handling misclassifications or missing data.

Key move Schedule quarterly governance reviews and model retraining.

PRACTICAL CHECKLIST

- 01** Appoint a workflow owner responsible for accuracy, exceptions, and changes.
- 02** Require human-in-the-loop for interpretation of ambiguous clauses.
- 03** Set approvals for automating critical obligations (e.g., regulatory renewals).
- 04** Define data retention and versioning for auditability.
- 05** Establish success metrics: coverage, accuracy, on-time notices.
- 06** Create a feedback loop with legal operations to improve models.
- 07** Ensure data governance and access controls comply with policy.

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ABOUT THE CREATOR

Suhas Bhairav

I build AI systems that combine distributed architecture, retrieval, knowledge graphs, security, and practical workflow design. My focus is AI that can be used repeatedly by real teams: understandable, reliable, and grounded in the work people already do.

EXPERTISE

- Principal systems architecture and applied AI engineering
- Production-grade AI systems, agentic workflows, RAG, and knowledge graphs
- Full-stack workflow applications across AWS, Google Cloud, Azure, on-premise, and hybrid environments
- Practical AI implementation patterns for automotive, manufacturing, finance, logistics, cybersecurity, sales, and customer operations
- Security, governance, observability, approvals, and failure-mode thinking for operational AI systems

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