

Spotting Playbook Drift Before It Becomes a Risk: A Checklist

START HERE

2 items

Pull every active agreement signed in the last 24 months

Include amendments and order forms. Gaps in version history are themselves a drift signal.

Note which deals were negotiated under time pressure or outside the normal process

These are where deviations most likely slipped through undocumented.

LIABILITY AND INDEMNIFICATION

2 items

Are your liability caps consistent, or have higher caps crept in across deals?

Flag any cap that exceeds your insurance policy limits.

Do your indemnity obligations align with what your insurance actually covers?

Gaps here are common and rarely caught until a claim is made.

AUDIT RIGHTS

2 items

Which agreements include audit rights, and what do they actually cover?

Security-only, financial, and operational audit rights carry very different resource implications.

Have audit rights appeared in agreements where your playbook doesn't allow them?

Counterparty counsel routinely copies provisions from enterprise agreements into smaller deals.

SECURITY ADDENDA AND TERMINATION

3 items

Do your security addenda say materially the same thing across customers?

Divergence usually shows up first in subprocessor lists and incident response timelines.

Are termination notice periods and auto-renewal windows consistent across your portfolio?

Inconsistent notice periods and missed auto-renewal windows create avoidable operational problems.

Has termination for convenience been granted to counterparties where your playbook doesn't allow it?

This is a significant concession that often gets made without being flagged.

FIX AND UPDATE

4 items

Document every deviation you found, with deal context and who approved it

This is your deviation log. You need it before you can update the playbook accurately.



Decide which deviations need amendment and which are acceptable to carry forward

Not every deviation is a problem. Some reflect how your standard has actually evolved.



Update the playbook to reflect any position that appears in more than 15% of agreements

At that frequency it is no longer a deviation. It is your new standard.



Set a recurring quarterly review

Put it on the calendar. Drift accelerates when review cadence lapses.



Draftwise can automatically do all of this for you: apply your institutional knowledge to every agreement, surface deviations in real time, and keep your playbook aligned with your best deals.

Talk to sales: sales@draftwise.com