

Workshare Conditions Precedent checklists

Dynamic checklists for the 21st Century



From drafts to final versions of Conditions Precedent (CP) files, fast.



Create a smoother transaction experience



Identify latest file versions



Display transaction status in a single snapshot

Workshare offers the smart way to share, organize and track document changes so you don't get distracted triple checking files and amends, and can stay focused on the task in hand. Checklists give every party involved in the CP process a transparent view of everything that's going on to support the delivery of CP files in an organized and controlled environment.

You are trusted by banking clients to deliver everything needed to secure a loan. Workshare is trusted by 98% of the world's largest law firms, and we can help with your CP process. Workshare provides the only truly dynamic way to take each file related to a matter from draft to final version fast. Everything is stored in a central, online checklist, which makes access and organization easier. Each file is anchored to a line in your checklist for you to populate as you go.

Instead of handling a deluge of emails and managing edits from your inbox, you can use Workshare to circulate the files in your CP list. You can also ensure all parties that need to review a file are able to comment directly into documents. Changes and amendments can be assimilated and approved faster, progressing matters toward final signoff from a single platform. Progress your transaction online from its foundation to its close by checking the status of each matter with a simple traffic light system.

You should use Workshare if you want...

Calm and order – All files relating to a transaction are online and ordered in one place. Documents can be shared, reviewed and amended, with all comments highlighted, meaning you're able to progress toward the final version with calm efficiency.

The best CP experience – With authority and control over each file anchored in your checklist, you can stem the flow of emails and deliver everything related to the loan in a smart and simple way, vastly improving the experience for you and your clients.

Reclaim your workday.

Less email. More productive. Our customers see an average **80% reduction** in email and save up to 2250 days of unbillable time each year.

Enjoy a simple, less stressful and more productive work life.

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Improve workflow

Make the journey of your checklist smooth and simple. From initial empty rows with status zero, marked red as outstanding and no files included, to fully complete and approved. Using the smart way to prepare each file, your checklist can be populated with the status updated as the transaction progresses. Then get to full authorization and signoff with every line showing green.



Control versioning and text comparisons

With Workshare you will be able to quickly and easily tell which is the latest version of a document that has been circulated for review. Without wasting time searching for files or checking whether all input has been received, you can move between the draft document, a document management system and email and always identify the latest version of your file.



Manage status at a glance

Status labels show you a traffic light system that moves from red to green as matters progress. The last column in each row of your checklist will show the status – outstanding, in progress, or awaiting approval. This is a simple and intuitive way to stay on top of your transaction. You will know what you need to do and where you need to progress matters with a single view of your transaction at a glance.

Related content

<https://www.workshare.com/product/deal-checklists>

About Workshare

Workshare is dedicated to helping professionals compare, protect and share their high stakes documents. Since 1999, Workshare has developed and released intelligent technology for business services firms. Now, more than two million professionals use Workshare around the world.

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