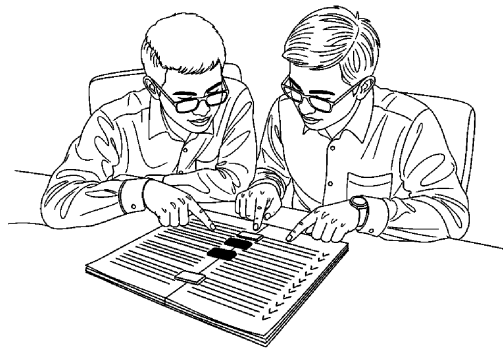


HIGH-VOLUME

WORKSHEET 2 OF 9

Weekly Contract-Portfolio Status Review

Fifteen minutes each week. Keeps the 90-day window visible before it becomes a 14-day emergency.



Complementary worksheet for
Contract Negotiation Tactics
by Ibrahim Anwar

What This Is For

The 60-to-90-day window before a contract expires is the optimal time to renegotiate, because time pressure exists in a roughly balanced way on both sides. Outside that window, the pressure distribution shifts: too early, and the other party can delay indefinitely because their current contract gives them all the certainty they need; too late, and the pressure falls entirely on you because you need a decision before the contract lapses. This weekly review keeps that window visible across every active contract so it never closes before anyone noticed.

Most operators discover a contract is expiring when they receive a renewal invoice or when the other party mentions it in passing. By then, the negotiation window has often already narrowed. The 90-day mark is the signal to start — assigning a reviewer, pulling volume and cost data, deciding whether to renegotiate, and if so, building the argument. A 15-minute weekly scan of expiry dates and auto-renewal deadlines is the minimum infrastructure that prevents that discovery from being an emergency.

Benefits

What you get when you actually run this worksheet on a real situation:

- Surfaces every contract entering the 90-day window before the window closes, so renegotiation starts with full leverage rather than time pressure.
- Forces a weekly look at auto-renewal notice deadlines — the clause most consistently missed and most consistently costly when it triggers unintentionally.
- Catches contracts where actual volume or cost has moved more than 20% from the original baseline, triggering a renegotiation analysis regardless of expiry date.
- Creates a standing agenda item that keeps contract management from being crowded out by daily operations.
- Produces a simple one-page status report that directors can review in two minutes, without needing to open the contract inventory spreadsheet themselves.

Framework To Use

— Traffic-Light Contract Status

Three status levels determine what action is required this week. Red means act now; amber means prepare; green means monitor.

Status	Condition	Required Action This Week
RED	Contract expiry within 30 days OR auto-renewal notice deadline within 14 days	Immediate decision: renegotiate, renew, or exit. Assign owner today.
AMBER	Contract expiry within 90 days OR volume/cost moved >20% from baseline	Begin renegotiation analysis. Pull data. Schedule conversation with counterparty.
GREEN	Contract expiry beyond 90 days AND no significant cost or volume drift	Monitor. Confirm next review date is correctly set in inventory.

How To Use

Follow these steps in order. Each one builds on the previous.

- 1 Open the contract inventory spreadsheet. Sort by the review date column (90 days before expiry) ascending, so the most urgent contracts appear at the top.
- 2 For each contract in the top ten rows, calculate how many days remain until the review date and enter it in column six of this worksheet.
- 3 Apply the traffic-light status: any contract with fewer than 30 days to expiry, or an auto-renewal notice deadline within 14 days, is Red. Any contract within the 90-day window or showing more than 20% cost or volume drift from its original baseline is Amber. All others are Green.
- 4 For every Red contract: decide this week whether to renegotiate, renew on existing terms, or exit. Write that decision in the status column and assign a named person to execute it.
- 5 For every Amber contract: determine what data is needed to build a renegotiation argument — actual volume, market rate comparisons, the other party's estimated switching cost. Assign the data collection task with a completion date.
- 6 Check whether any contract's actual volume or invoiced cost has moved more than 20% above or below the annual value recorded at signing. If yes, escalate to Amber regardless of the expiry date.
- 7 File the completed weekly worksheet. The previous four weeks' worksheets show which contracts have been sitting at Amber for more than a month without progressing — those need a decision, not continued monitoring.

Example Use

A mid-sized logistics operator with 14 active contracts runs the weekly review on a Monday morning. Three contracts are in the spreadsheet; two require action.

Contract A is a warehouse lease with an annual value of \$72,000. The review date in the inventory shows 62 days remaining. The lease has a 10% per year escalation clause that has been running for two years. The owner calculates the auto-renewal notice deadline: 60 days before expiry, which falls in 22 days. Contract A moves to Red.

The decision is made immediately: do not let this auto-renew. The renegotiation target is to replace the fixed 10% escalation with a CPI-based clause capped at 5%. The owner checks the current CPI for property in the relevant province (3.8% for the last 12 months) and builds a two-line argument: "The fixed 10% escalation has been running for two years. Actual CPI for this category was 3.8% last year. We propose replacing the escalation mechanism with a CPI-based adjustment capped at 5% annually." A call to the landlord is scheduled for Wednesday.

Contract B is a distribution agreement with annual value of \$180,000. It has 4 months until expiry. But the actual volume delivered over the last 12 months has been \$216,000 — 20% above the \$180,000 baseline in the contract. Contract B moves to Amber. The volume increase means the vendor's switching cost has grown proportionally. A renegotiation analysis is assigned: pull 12-month volume data, estimate the vendor's cost to replace this customer, and prepare a conversation about improved payment terms in exchange for a volume commitment clause.

The weekly review takes 18 minutes. Contract A prevented an unwanted auto-renewal on unfavorable escalation terms. Contract B's growing leverage was caught before it was forgotten.

Reflection Prompts

After filling in the worksheet on the previous page, work through these.

1. Which contracts enter the 90-day window in the next four weeks? List them and assign a named person responsible for the renegotiation or renewal decision today, not when the window has already started.
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2. Has any contract's actual invoiced cost or delivered volume moved more than 20% from its original baseline? Flag those for renegotiation analysis regardless of expiry date – volume growth is a leverage argument that does not wait for the calendar.
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Tips and Traps

TIPS

- Do this on the same day and time every week. The habit matters as much as the method. A contract review that depends on remembering to do it will be skipped during busy periods — which are exactly the periods when a deadline is most likely to pass unnoticed.
- Set two calendar reminders for every auto-renewal notice deadline: one at 90 days before the deadline, and a second at 14 days. The 14-day reminder is the failsafe for the 90-day reminder that got buried.
- Keep four weeks of completed worksheets on file. A contract that has been Amber for three consecutive weeks without progressing is a sign that the responsible person does not have enough information or authority to act. Escalate it.
- When a contract enters Red, the decision must happen that week, not be carried to the next review. Red means the window is closing faster than the review cycle.

TRAPS

- Treating the weekly review as a reading exercise rather than a decision exercise. Each row in the worksheet requires a status and an assigned action, not just an acknowledgment that the contract exists.
- Counting calendar days to expiry rather than business days to the auto-renewal notice deadline. A contract expiring in 45 calendar days may have a notice deadline in 15 business days if the clause specifies calendar days for the notice period. Read the clause, not just the date.
- Skipping the volume and cost drift check because 'nothing has changed significantly.' A 20% drift accumulates in small monthly increments that individually seem insignificant. Calculate year-on-year, not month-on-month.

Appendixes

Appendix A – Eight-Column Contract Inventory (Column Definitions)

Column 1 : Contract partner name (legal entity, not representative)

Column 2 : Contract type (lease / vendor / distribution / employment / services / financing)

Column 3 : Annual contract value (\$) – use 12-month trailing average if volume-dependent

Column 4 : Contract effective date (not signing date)

Column 5 : Expiry date + auto-renewal clause details:

- Does auto-renewal exist? (Y/N)
- Notice deadline to prevent renewal (days before expiry)
- Renewal period if triggered (months)

Column 6 : Key clauses – 3-5 word summaries per clause

e.g. "10%/yr escalation, 30-day termination, 24-mo renewal"

Column 7 : Review date = expiry date minus 90 days

This is the most important date in the inventory.

Mark it in the calendar the day the contract is signed.

Column 8 : Last negotiation notes – what changed, what did not, what argument worked

Appendix B – Volume Drift Calculation (For Renegotiation Trigger)

Use to determine whether current volume justifies a renegotiation conversation independent of the expiry date:

Original baseline volume : \$_____ /year (from contract)

Current volume (12-month) : \$_____ /year (from invoices)

Drift percentage : $(\text{Current} - \text{Baseline}) / \text{Baseline} \times 100$

If drift > +20% : your switching cost to the other party has grown.
Renegotiation argument is stronger.
Flag contract as Amber regardless of expiry date.

If drift > -20% : your volume commitment is below the original basis.
Check whether this triggers any minimum-purchase or take-or-pay clause in the contract.

Vendor switching cost estimate at current volume:

Search and evaluation time : _____ weeks x your value/week

Onboarding period : _____ months x your volume/month

Quality risk premium : _____ % of current annual value

Total estimated switching cost : \$_____

That total is what the vendor pays if they lose you. It is the floor for how many concessions they will make to keep the business.



WHERE THIS WORKSHEET COMES FROM

Contract Negotiation Tactics

A Clear Contract Is a Healthy Relationship

by Ibrahim Anwar

This worksheet is one of nine in the *Contract Negotiation Tactics* companion worksheet pack. The full pack is grouped into three categories: high-volume worksheets you can run weekly, niche-search worksheets for rare but high-value situations, and specific-case worksheets that walk you through a single concrete scenario.

Every framework, decision filter, and figure used in these worksheets is drawn from the chapters of the source book. The book sets the diagnosis, the worksheets give you the form to act on it.

Available on Google Play Books

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