



Contract Administration Records and Follow-Up Course



AGILE LEADERS
Training Center

Contract Administration Records and Follow-Up Course

Overview

Contract Administration Records and Follow-Up Course is a five-day foundation course for contract administrators, coordinators, project support, commercial assistants, and operations staff who leave with a Contract Administration Control File. Participants practice contract file management, obligations tracking, contract correspondence, payment records, and change logs through registers and follow-up routines. The course addresses missing records, unclear ownership, and delayed actions. Agile Leaders Training Center presents contract administration as disciplined operational follow-through.

Who Should Attend

- Contract support functions responsible for files, registers, and routine follow-up
- Procurement coordination functions responsible for supplier records and approvals
- Project support functions responsible for deliverables, dates, and action tracking
- Commercial support functions responsible for payment and change documentation
- Operations functions responsible for service records and issue escalation

The course assumes participants can read workplace documents and maintain records and leaves out contract drafting, negotiation, claims analysis, advanced commercial strategy, and jurisdiction-specific legal advice.

Departments and Industries

The course supports departments and industries that administer supplier, service, and project agreements.

- Contracts, procurement, commercial, and legal operations support
- Projects, finance, supplier coordination, and records management
- Technology, telecommunications, and professional services
- Facilities, construction, energy, and utilities
- Healthcare, hospitality, logistics, and manufacturing

Learning Objectives

By the end of this course, participants will be able to:



- Build a controlled contract file and register set
- Use duty, deliverable, date, and approval trackers
- Apply correspondence and meeting-record controls
- Analyze payment, change, and issue records
- Prioritize actions and escalation routes
- Evaluate renewal and closeout file readiness

Course Agenda

Day 1: Setting Up Contract Records

- Contract Document Index Template
- Controlled Contract File Structure
- Key Terms and Requirements Extract
- Role and Contact Responsibility Matrix
- Record Naming and Version Checklist

Day 2: Tracking Duties and Communications

- Contract Obligation Tracking Register
- Deliverable and Due-Date Schedule
- Contract Correspondence Control Log
- Meeting Action and Decision Record
- Approval Routing Status Board

Day 3: Supporting Delivery and Payments

- Service Receipt Evidence Checklist
- Performance Data Filing Guide
- Invoice and Payment Status Tracker
- Supplier Issue Escalation Map
- Risk and Mitigation Update Register

Day 4: Recording Changes and Closeout

- Contract Change Request Log
- Change Notice and Approval Checklist
- Current Contract Version Record
- Renewal Decision Preparation Sheet
- Exit and Closeout File Checklist



Day 5: Contract Administration Practice

- Exercise: Assemble a Controlled Contract File
- Exercise: Update Duties and Action Trackers
- Exercise: Reconcile Payment and Delivery Evidence
- Exercise: Record a Change and Escalation
- Capstone Exercise: Contract Administration Control File

Practical Exercises

The course uses suggested activities to practice contract administration in routine business settings.

- Suggested activity: organize a technology service contract file and identify missing records.
- Suggested activity: track facilities-service duties, deliverables, correspondence, and approvals.
- Suggested activity: reconcile logistics delivery evidence with an invoice and payment record.
- Suggested activity: prepare a change log, escalation record, and closeout checklist for a supplier agreement.

FAQs

Who suits the Contract Administration Records and Follow-Up Course, and what does it assume?

It suits personnel supporting routine contract records and actions and assumes they can read business documents, coordinate colleagues, and maintain accurate files.

How does contract administration differ from contract management strategy?

Contract administration focuses on files, registers, correspondence, approvals, payments, changes, and follow-up, while contract management strategy addresses governance, commercial direction, supplier relationships, and broader performance decisions.

What records belong in a contract administration file?

A contract administration file should contain the approved contract, schedules, contacts, correspondence, meeting records, duty and deliverable trackers, approvals, payment evidence, changes, issues, performance records, and closeout documents.

How should contract obligations be tracked?

Contract obligations should be tracked by requirement, owner, due date, dependency, evidence, approval status, exception, follow-up action, and completion record.



What should a contract closeout file confirm?

A contract closeout file should confirm completed duties, accepted deliverables, final payments, resolved actions, returned information and assets, retained records, renewal decisions, approvals, and authorized closure.

Conclusion

Participants leave with a Contract Administration Control File for their working environment. The file connects documents, contacts, duties, deliverables, correspondence, approvals, payments, changes, issues, renewal, and closeout. Teams can use it to assign routine follow-up, retrieve evidence, and preserve an audit trail across contract handovers.



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