

Bringing CLM and CRM together for people who know the value of optimized technology

A supply chain and enterprise technology consulting firm streamlines its sales experience with Contracts 365[®] for Microsoft Dynamics 365.

INDUSTRY

Technology Consulting

OBJECTIVE

To fully integrate the company's customer relationship management system (CRM) with its contract lifecycle management application (CLM) for greater efficiencies and a faster sales cycle

RESULTS

- Moved from a manual, homegrown solution to a world-class CLM solution
- Seamlessly integrated Contracts 365 and Dynamics 365 Sales for improved sales efficiency and team collaboration
- Vastly simplified and sped up contract requests, drafting and approvals by leveraging information directly from Dynamics 365 Sales

Customer Profile

Founded in 2002, enVista is a leading supply chain and enterprise technology consulting firm that provides supply chain optimization services, retail services, automation and robotics, Microsoft solutions, and IT managed services. The company has offices in Carmel, Indiana, and Chicago, Illinois, and serves thousands of leading brands across the globe, helping optimize and transform physical and digital operations to improve customer service while maximizing their clients' cost savings and profitability.

Business Challenge

As a technology consulting firm, enVista understands the importance of leveraging purpose-built technology. And, because they support Microsoft solutions for countless customers, they also recognize the value of maximizing their IT investment—and the powerful insights and ease of use that comes with embracing the Microsoft ecosystem.

Why they chose Contracts 365[®]

So, it's no surprise that, after a robust RFP process, enVista selected Contracts 365 as their contract management application as they transitioned from a home-grown approach to a highly efficient and industry leading CLM solution.

enVista's legal team decided to roll-out Contracts 365 across the organization but, at the time, decided to keep its customer relationship management (CRM) separate.

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Amy Mader, General Counsel

The early results

“Contracts 365 had already proven its value in our contracting process on so many fronts,” said Amy Mader, enVista’s General Counsel. “When the Dynamics integration was introduced, it added an entirely new and efficient value proposition that was immediately appreciated by our sales organization.”

For many salespeople, their CRM is their homebase, cataloging key customer data, monitoring customer interactions, and staying abreast of where accounts are in the sales cycle. Contracts 365 is designed to tightly integrate with Microsoft Dynamics 365, so Contracts 365 functions as if it is natively built into the software. This allows salespeople to create new contracts, auto-populate forms with existing customer information, and request approvals without ever leaving their Dynamics’ dashboard. Salespeople no longer have to redundantly enter data into Contracts 365 which is readily available within their Dynamics 365 Sales application.

“With the Dynamics integration module, our sales teams are now able to request and access contracts in less than 30 seconds”

Amy Mader, General Counsel

“Contracts 365 is ideally suited for both buy-side and sell-side contracts,” noted Mader. And the sales cycle has already seen positive effects. “With the Dynamics integration module, our sales teams are now able to request and access contracts in less than 30 seconds.”

Contracts 365 for Dynamics not only speeds up requests, it helps improve the entire sales process—signaling sales opportunities with expiration notifications, improving negotiation with up-to-date customer information, ensuring contract compliance with pre-approved language, and giving the entire organization better visibility into the contract process. So, sales teams can keep clients updated and close deals faster, and legal teams can stay focused on their highest value tasks.

With Contracts 365 for Dynamics, even minor improvements can have a big impact. enVista started by allowing salespeople to submit a request and find a contract without having to leave their CRM. It can be further leveraged to automatically create new opportunities for upcoming renewals—without manual intervention. As these capabilities add up, they provide an efficient, cohesive, and effective process for everyone involved.

That’s the difference optimized—and tightly integrated—contract management technology can make.

contracts³⁶⁵

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ABOUT CONTRACTS 365

Contracts 365 is powerful contract lifecycle management software purpose-built for companies that run Microsoft 365®. With 100,000+ users worldwide, Contracts 365 delivers greater efficiency, usability, privacy, and control for contract-driven organizations in real estate, life sciences, energy, supplier management and beyond. See why customers like AARP, Urban Outfitters, YMCA, and Zeiss put their trust in Contracts 365. Learn more at contracts365.com.