

contracts³⁶⁵[®]

WEBINAR

Seamless Sales: Contract Management In Microsoft Dynamics 365

May 19, 2026

What We'll Cover Today

01

Introduction

02

**Why Contracts
Matter**

03

**Benefits & Five Primary
Use Cases For Integration**

04

**Dynamics 365 CRM &
CLM Deconstructed**

05

**Real-World ROI
Metrics**

06

**Company Intro &
Product Demo**

Introductions



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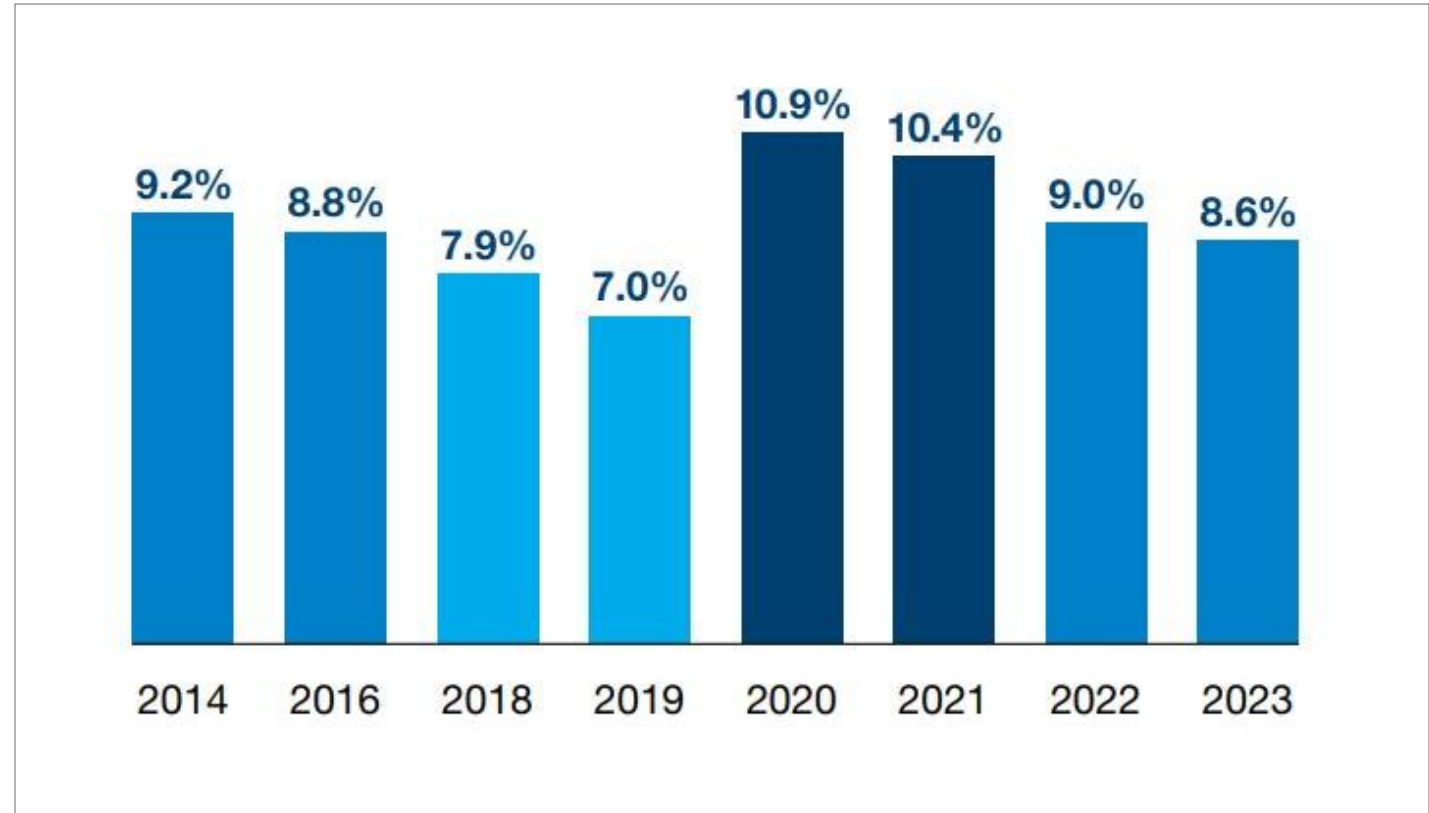
02



Why Contracts Matter

**Every Transaction
Begins With A Contract**

Contract Value Erosion



Source: World CC Benchmark Report 2023

1%

(Conservative Estimate)

**For a \$100M Organization, Just 1% Equals
\$1,000,000 of Lost Revenue Annually**

3.4 Weeks

**Average Time to Get Contract Approved
in Mid-Large Organizations**

33%

**Amount of the Workforce
Involved in Contracting**

18%

**Amount of the Sales Cycle
Consumed by Contracting**

\$3,000,000

**Annual Cost of Searching
or Recreating Lost Documents**

(for businesses with 1,000 employees)

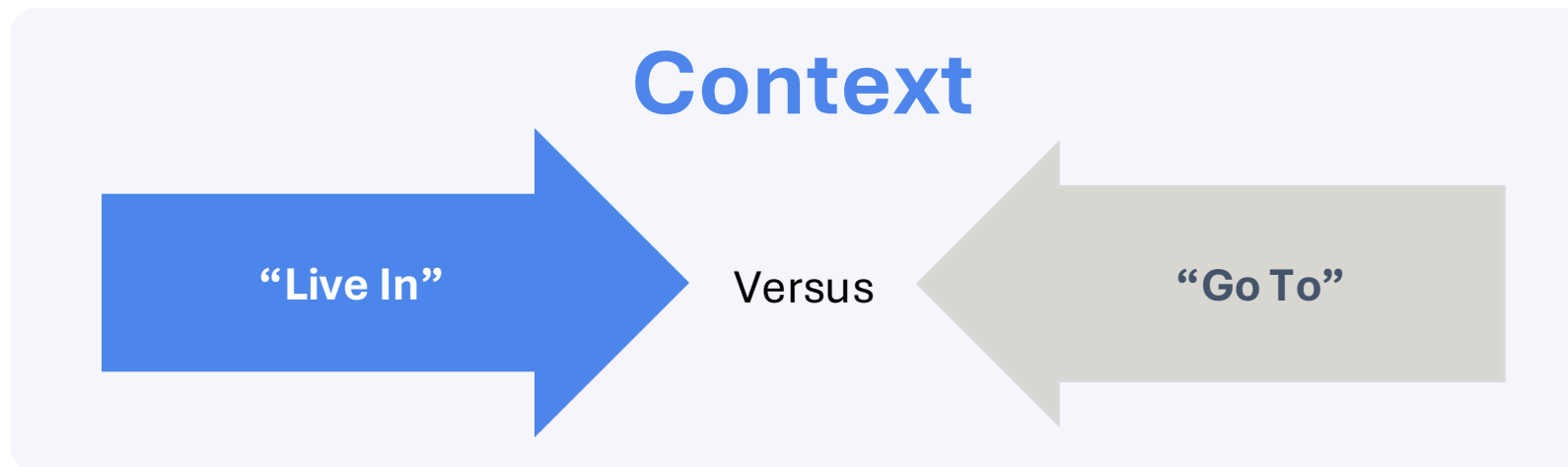
03



Business Functions & Benefits

The “Live-In” Benefit of Great Integration

- Integration between disparate yet complimentary systems often introduces complexities to deliver meaningful functionality
- When integrating D365 Sales with a Contract Lifecycle Management (CLM) system, the contextual setting that must be understood is: “Where do users ‘live’?”
- Microsoft’s mantra for Dynamics 365 is “Staying In The Flow Of Work” — which is consistent with other CRM systems when it comes to optimal user experiences.



The Primary **Business Functions** (and Benefits) of CLM & D365 Sales Integration

Initiate
Contract
Within D365
Sales

Show Linked
Contracts
Within D365
Sales

Single Sign
On &
Integrated
Security

Create
Supporting
Docs Within
D365 Sales

Update
D365 Sales
Based Upon
CLM Activity

The “Live-In” Benefit of Great Integration

Salespeople

What they need:

- Accelerate sales cycles by removing delays and administrative burdens.

Why Integration matters:

- Contracts move seamlessly from D365 Sales to CLM, reducing back-and-forth and helping close deals faster.

Sales Ops / Management

What they need:

- Visibility into the entire sales-to-contract process to track performance and forecast accurately.

Why Integration matters:

- Eliminate duplicate data entry, reduce errors, and provide better pipeline-to-contract analytics.

Contract Professionals

What they need:

- Access to accurate deal data from Sales to draft, review, and finalize contracts efficiently.

Why Integration matters:

- Ensures the right data flows automatically from D365 Sales, reducing rework and keeping contracts compliant and consistent.

IT / Compliance

What they need:

- Secure, proven integrations between enterprise systems that meet compliance and governance standards.

Why Integration matters:

- Creates a standardized, predictable environment for managing and protecting data, reducing risk and IT overhead.

04



Dynamics 365 CRM & CLM Deconstructed

The Primary **Business Functions** (and Benefits) of CLM & D365 Sales Integration

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Where to Initiate

- Most organizations use the “standard” Tables/Data Entities.
- Dynamics 365 Sales provides ability to create Custom Tables which may be appropriate for initiation purposes.

How to Initiate

- Initiating the Request should never be more than one click away for anyone using D365 Sales.
- Once initiated, the experience should be very seamless with an immediate return to their starting point once completed.

CLM Data Requirements

- The creation of a contract is often dependent upon key data from the D365 Sales: Contract Amount, Customer, PO # and other information collected in the sales cycle.
- This information needs to be easily and transparently posted from D365 Sales to the CLM system when initiating requests.



Where to Initiate

- Dynamics 365 Sales are built upon a large number of Tables; identify which contracts show for each Table/Object.
- When a contract is created at the Opportunity level, should it display at the Account level or at some Custom Table that was created within your organization?

How to Initiate

- Most CLM systems will have a large collection of data fields available for display within D365 Sales.
- e.g. Fields can vary based upon the Data Entity displaying the Linked Contracts. (Additional consideration must be given to if the Contract Records and/or Contract Documents are displayed.)

Actions to be Taken

- With Contracts now available within the system, what should the Sales team members be able to do?
- e.g. Should they be able to access more information, initiate a negotiation, open the actual documents, participate in a workflow process or take some other type of action?





Single Sign On & Integrated Security

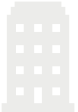
SSO Support


- Well-designed integrations must take SSO into account for as D365 Sales users to avoid unnecessary logins/credentials.
- “Identity Providers” should be consolidated for authentication, password policy management and related security implications


Integrated Permission Access


- The importance of having a consolidated and integrated permission/security model is also a powerful factor for well-designed integrations.
- Ideally, there should be a mechanism that allows for corporate security groups in one Identity Provide to be leveraged across both CLM and D365 Sales.

Understanding Parent-Child Document Relationships


 Account/Counterparty
MedLand, Inc.


 Contract Record
MedLand NDA

 Contract Document
MedLand NDA-Draft.docx

 Contract Document
MedLand NDA-Signed.docx

 Contract Record
MedLand MSA

 Contract Document
MedLand MSA-Draft.docx

 Contract Document
MedLand SOW1-Draft.docx

Create Supporting Docs Within D365 Sales



Contract Record Selection

- Support is needed to select which Contract Record will be the “parent” of the new Supporting Document.

Data Inheritance From Contract Record

- Configurability is needed to inherit data from the Contract Record and use for generating a new Supporting document.

Contract Document Specific Data

- Data specific to the Supporting document should be available within Dynamics 365 Sales for auto-populating into the CLM.





**Update D365
Sales Based
Upon CLM
Activity**

Data Transfers

- Automatically transfer data from the CLM system to D365 Sales based upon a pre-defined data mapping process.

Event-Driven Process

- Allow for flexibility when defining what event would initiate the writing of data from the CLM system to D365 Sales. For example, when a contract has been executed, the Opportunity Status may get updated.

Data, Documents, or Both

- Depending upon how information is to be inserted into D365 Sales, there may be a need to post only data (e.g. status example above) or populate a D365 Sales link field with a link back to Contract (and/or documents) in the CLM system. Also note that none of these are mutually exclusive.



New Counterparty Creation

- When initiating a contract from within CRM, it is important to have the ability to dynamically create the related counterparty (or not).

CLM Initiates New D365 Sales Opps

- The CLM system should have the ability to dynamically create full D365 Sales Opportunities based upon events (e.g. upcoming renewal date).

Related Deal Data

- D365 Sales by default has related Tables (e.g. Product or Service) for the Opportunity. If these related Tables are in use, you may need to populate comparable structures in the CLM.

Extended Data Support

- Support for standard Tables within D365 Sales is critical
- There is a growing trend to build out other Tables to support Sales-related functions, which are very important as well.



What About Finance/BC/GP (ERP) Systems?

1

Master Data Validation

“System of Record” data (e.g., counterparties, products) are copied from ERP system to Contracts 365 to eliminate and/ or reduce redundant data.

2

Content Posting

Once a contract has reached a designated status (e.g., Active), data can be copied/pushed automatically from Contracts 365 to ERP.

3

Contract Enabling ERP Systems

Allow for Contracts 365 to be accessed within the ERP system for simplified access.

4

Transaction Data Support

“System of Record” data (e.g., counterparties, products) are copied from ERP system to Contracts 365 to eliminate/reduce redundant data.

5

Initiate C365 Request From ERP System

Initiate a C365 request for a contract or other key data entity from an ERP system which posts ERP data directly to Contracts 365 with a link back.

05



Real-World ROI Metrics

Customer ROI Metrics



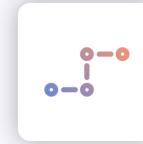
Three Activities

- Submit Request From D365
- Find Contract
- Check Status



People

- 1 Attorney
- 1 Contract Manager
- 17 Salespeople
- 7 Senior Leadership
- 10 Business Users



Economics

- Pre-Automation: \$1.2M
- Post-Automation: \$169k

Customer ROI Metrics

Process Assessment Find A Contract							
Activity/Task	Count Per	Role	Number Of	Pre Automation		Post Automation	
	Year		People In Role	Minutes/Unit	Estimated Cost	Minutes/Unit	Estimated Cost
Attorney - Searches For & Finds Contract	45	Attorney	1	4.00	\$13,522	0.50	\$1,690.20
Contract Professional - Searches For & Finds Contract	220	Contract Professional	1	4.00	\$58,173	0.50	\$7,271.63
Sales Person - Searches For & Finds Contract	90	Sales Person	17	6.00	\$376,005	0.50	\$31,333.74
Senior Leadership - Searches For & Finds Contract	20	Senior Leadership	7	6.00	\$75,721	0.50	\$6,310.10
Business User - Searches For & Finds Contract	135	Business User	10	6.00	\$287,297	0.50	\$23,941.41
Process Assessment Find A Contract Estimated Totals					\$810,718		\$70,547

Process Assessment Check Status Of Contract							
Activity/Task	Count Per	Role	Number Of	Pre Automation		Post Automation	
	Year		People In Role	Minutes/Unit	Estimated Cost	Minutes/Unit	Estimated Cost
Sales Person - Check Status Of Contract	225	Sales Person	17	2.00	\$313,337	0.50	\$78,334.34
Senior Leadership - Check Status Of Contract	20	Senior Leadership	7	2.00	\$25,240	0.50	\$6,310.10
Business User - Check Status Of Contract	30	Business User	10	2.00	\$21,281	0.50	\$5,320.31
Process Assessment Check Status Of Contract Estimated Totals					\$359,859		\$89,965

Process Assessment Contract Request Submission							
Activity/Task	Count Per	Role	Number Of	Pre Automation		Post Automation	
	Year		People In Role	Minutes/Unit	Estimated Cost	Minutes/Unit	Estimated Cost
Sales Person - Contract Request Submission	13	Sales Person	17	5.00	\$46,079	1.00	\$9,215.81
Process Assessment Contract Request Submission Estimated Totals					\$46,079		\$9,216

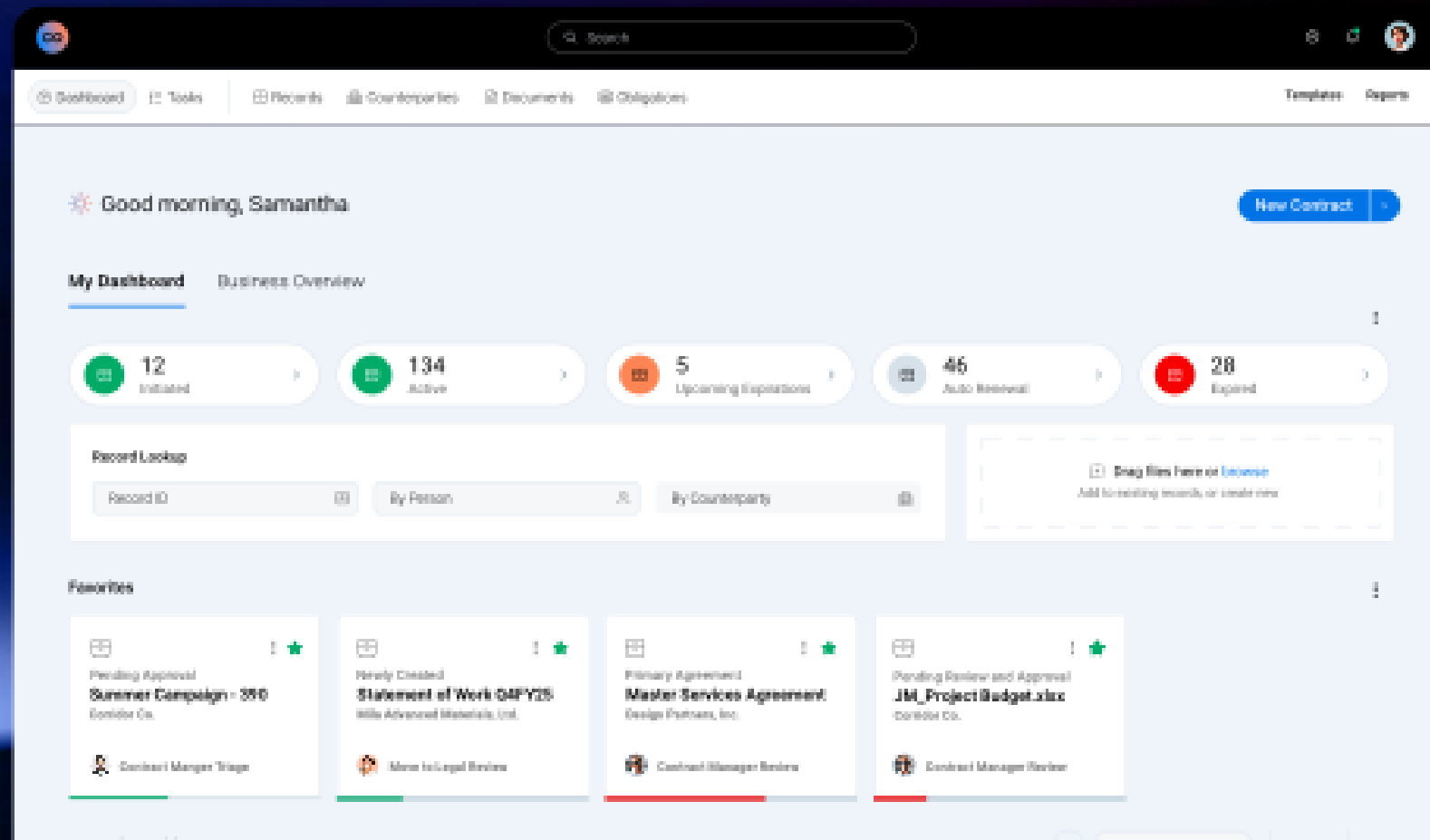
06



Company Intro & Product Demo

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Powerful contract management software
for businesses that run Microsoft 365.



After 25 years in business supporting a variety of global brands, we have arrived at one fundamental truth:


**Technical success does not
equal business success**

That's why we built Contracts 365 differently, from the ground up.




PLATFORM

Microsoft 365®




PEOPLE

User Experience



PROCESS

Customer Success Journey



NO CODE

Ready-To-Use Solution



SAAS USER EXPERIENCE

Architected for organizations that have embraced the Microsoft vision.

- ✓ Purpose-built for contract management
- ✓ Modern user experience & extremely easy to use
- ✓ Highly configurable for most use cases



CONTRACT REPOSITORY

Contract storage in your Microsoft 365 cloud.

- ✓ Retain ownership of your contracts & data
- ✓ Increased security, visibility, control
- ✓ Vetted by your IT & Sec leaders
- ✓ Rapid adoption of data governance policies

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Works in all Microsoft cloud environments



Dynamics 365



Power Platform



Microsoft 365



Microsoft
Entra ID



Microsoft Azure

Leverages apps people use every day



Key integrations make contract workflow easier



Adobe Sign

DocuSign

Advanced AI, data and security services



Microsoft
Foundry

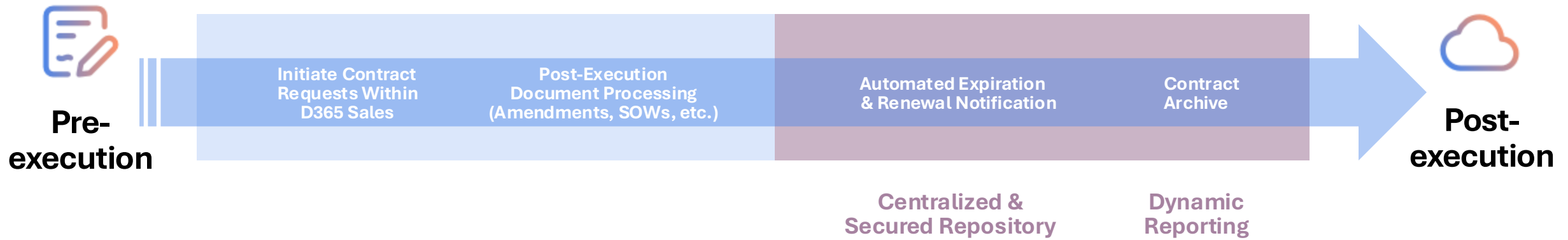


Microsoft
Defender

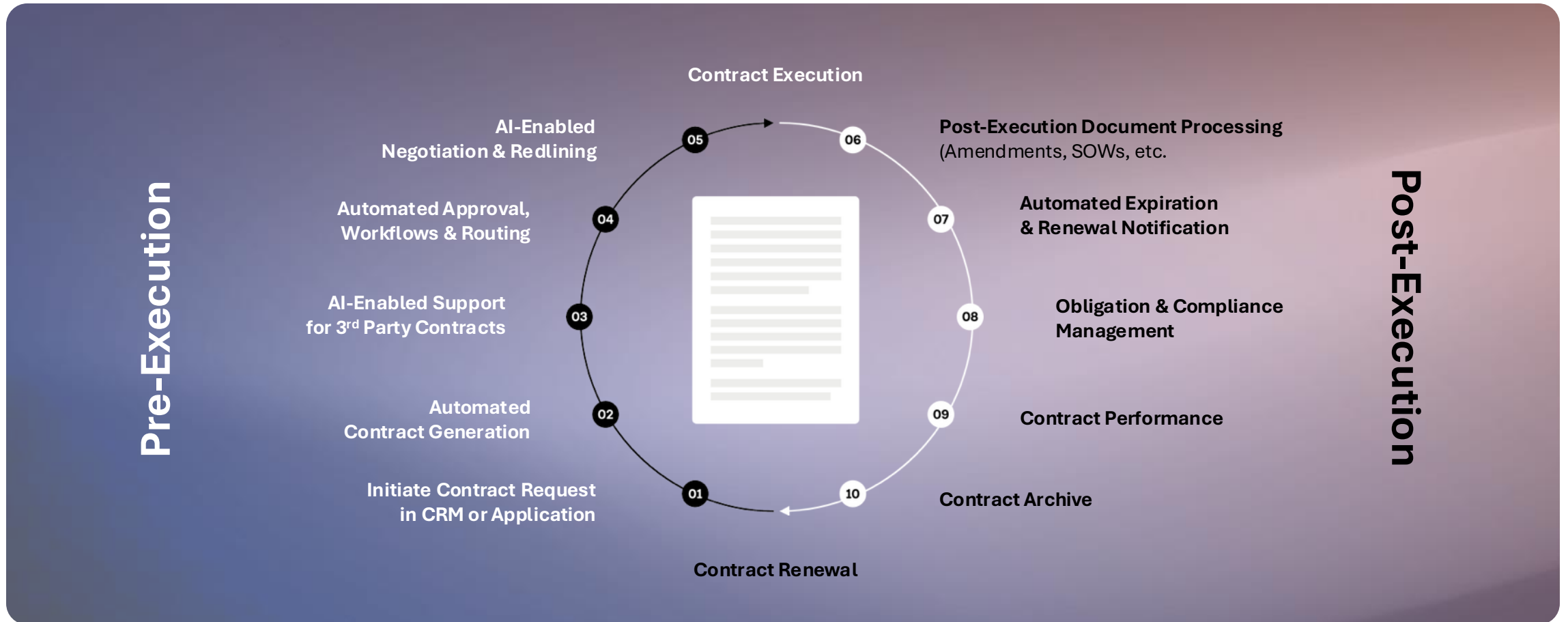


Microsoft
Sentinel

Contract Management at First Glance



Delivers greater efficiency for all contract lifecycle activities



Centralized & Secured Repository

Dynamic Reporting

Role-Based Dashboards

Integration With Other Systems

Easily handles any type of contract.

Buy Side

- Agency Agreements
- Business Associate Agreement
- Clinical Trial Agreement
- Confidentiality (Non-Disclosure) Agreement
- Consulting Agreement
- Equipment Purchase Agreement

Sell Side

- Confidentiality (Non-Disclosure) Agreement
- Customer Master Services Agreement
- Equipment Sales Agreement
- Framework Agreement
- Settlement Agreement



Employment

- Employment Agreement
- Employment Services
- Separation Agreement



Distribution & Partnerships

- Distribution Agreement
- Partnership Agreement
- Resell Agreement



Real Estate

- Construction Agreement
- Facilities Agreement
- Investor Side Letter
- Lease Agreement
- Property Mgmt. Agreement
- Property Services Agreement



Corporate

- Banking Services
- Capital Investment Agreement
- Joint Venture Agreement

Demonstration: Contracts 365 in Dynamics



DEMO

Dynamics CRM User

- ✓ Find a contract
- ✓ Submit a contract request
- ✓ Check contract status



DEMO

Core Team

- ✓ Access CM Portal
- ✓ Approve a contract
- ✓ Look at workflow
- ✓ Review workflow metrics

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WEBINAR

Leveraging Microsoft 365[®] for Contract Management

See how organizations around the world are using Microsoft 365, AI, and their own secure Microsoft Cloud to process contracts more effectively.

Join us live: June 18th • 11:00AM Eastern

Thank you!

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