

## For ClearPoint Health, integrating Contracts 365 and Dynamics 365 was a clear win.

Empowering an employee benefits platform that harnesses the power of a community to generate market-leading insurance discounts for SMBs.

### INDUSTRY

Healthcare Insurance

### OBJECTIVE

Seamlessly integrate customer relationship and contract management technologies

### RESULTS

- Moved a from disparate, homegrown solution to a world-class CLM technology
- Seamlessly integrated CLM and CRM systems to improve team collaboration
- Vastly simplified and sped up contract requests and approvals

### Customer Profile

ClearPoint Health, based in Columbia, SC, is a digital alternative funding solutions marketplace that empowers benefit advisors to offer progressive, transparent and affordable health insurance to small and mid-sized businesses. With a focus on innovation, transparency and clinical integration, ClearPoint Health provides solutions that not only meet the financial needs of employers but also enhance the healthcare experience for employees.

### Business Challenge

Healthcare insurance is an incredibly contract-intensive business. As a relatively new player in the space, ClearPoint Health had been using disparate and highly manual systems to manage their contracts. But, as they continued to grow, it became apparent that finding a reliable Contract Lifecycle Management solution was becoming an enterprise imperative.

### Why They Chose Contracts 365

Fortunately, as ClearPoint Health began exploring new CLM vendors, they also added a new member to their legal team, one with deep experience in the CLM space.

“ClearPoint was close to going forward with another product when I joined,” said Taylor Stott-Trout, Deputy General Counsel, “But I thought it was worthwhile introducing them to the team and the product at Contracts 365.”

Stott-Trout had been a key part of the CLM vendor review and implementation at her prior employer, and they had enthusiastically chosen Contracts 365. Because ClearPoint Health also leveraged Microsoft as their IT platform, she felt Contracts 365 would be an ideal fit. She also knew that Contracts 365 offered an industry-leading Dynamics 365 CRM integration.

Because ClearPoint Health works with numerous counterparties—advisors, employers, and healthcare vendors—their business relies on highly efficient customer relationship management. Contracts 365 is designed to integrate tightly with Dynamics 365, allowing users to request and create contracts with a click of a button, and without ever leaving their Dynamics dashboard. Forms are auto-populated with CRM data, and contracts can move into approvals faster than ever before.

“Contracts 365 has consistently proven to be the best CLM solution available for Microsoft customers,” Stott-Trout noted. “After reviewing competitive products, it was clear. There is simply no better solution that integrates with Dynamics 365 Sales.”

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*Taylor Stott-Trout,  
Deputy General Counsel*

As their CLM initiative moved forward, the ClearPoint Health team also came to understand how important it was to have a reliable and flexible partner. And as Stott-Trout envisioned, Contracts 365’s ability to leverage ClearPoint Health’s existing Microsoft Cloud infrastructure proved to be highly effective, and consistent with their security and architecture preferences.

## Looking Ahead

“Contracts are such an important part of business today; they are intrinsic to nearly every aspect of a company’s operations. So, it’s not uncommon for us to get to know our customers very, very well,” commented Jasmin Steely, Chief Operating Officer of Contracts 365. “I think it’s an incredible reflection on our product and the entire Contracts 365 team when those customers recommend us to their colleagues or new organizations. Those types of relationships are the cornerstone of what we do, and we work as hard as we can to live up to the high standards Taylor has established for us over the years.”

Today, ClearPoint Health can manage its contracts as efficiently as it manages innovative healthcare insurance programs for its customers. And that’s a clear win for everyone.

# contracts<sup>365</sup>

## ABOUT CONTRACTS 365

Contracts 365 is powerful contract life cycle management software purpose-built for companies that run Microsoft 365®. With 100,000+ users worldwide, Contracts365 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 New Balance, Square Enix, Urban Outfitters, and Zeiss put their trust in Contracts 365. Learn more at [contracts365.com](https://contracts365.com).

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