



# Practical and Meaningful Reporting & Dashboarding for Contract Management

**December 18, 2025**

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# What We'll Talk About Today

01

**Human  
Vital Signs**

02

**Contract Industry  
Data Points**

03

**Contract  
Vital Signs**

04

**Delivery, Reports,  
Dashboards Or More**

05

**Now What...  
Where Do We Really Start?**

06

**Contracts 365  
Intro & Demonstration**

# Introductions



**Russ Edelman**

Founder and  
Chief Product Evangelist



**Dave Sandstedt**

Vice President  
Marketing



## Poll Question #1

### How Do You Support Contract Reporting?

- ✓ We don't prepare contract reports
- ✓ We use Excel
- ✓ Our CLM System...and then reformat output
- ✓ Our CLM System's formatted reports
- ✓ Some type of BI Tool
- ✓ Other

01

# Story 1 : Human Vital Signs

# Common Human Tests



02

# Contract Industry Data Points

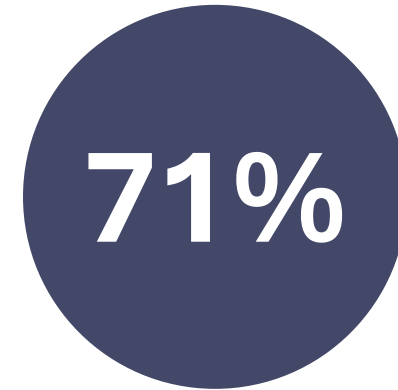
# Industry Data Point



Of Organizations Lack Clear Accountability  
for Contracting Performance



# Industry Data Point



Of Companies Cannot Locate  
At Least 10% Of Their Active Contracts

# Industry Data Point

25%

Only 20-30% (average of 25%) Of  
Companies Have A Genuinely Formal &  
Consistent Reporting Process

03

# Contract Vital Signs

# Contract Vital Signs | Story 2 : Supplier Risk Report

A Small SaaS Software  
Company Produces An  
Important Monthly Report

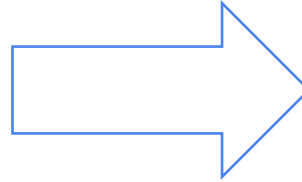
The Report Gets Delivered  
To The Board Of One Of Top Ten  
Most Valuable Companies

It Drives Key Decisions To  
Determine Key Supplier  
Management Risk & Action

**The Power Of One Report Can Influence So Much...**

# Rethinking...Contract Vital Signs

**“Contract” Vital Signs  
+  
Strategic Report**



**Critical Thinking**

Who Needs



What Information



When Is It Needed



In What Format



Actions To Be Taken

# The Source Of Contract Vital Signs

## Where Does The Data Reliably Come From...

Your **Contract** Database?

Your **ERP** System?

Your **CRM** System?

Another **LoB** System?

## What About...

**Duplicative** Data?

**Hierarchical** Data?

**Integration** Across Systems?

Data **Refreshes**?

# Contract Vital Sign Focus Areas By Persona

Persona/Role	Primary Focus	Common Reporting Categories
General Counsel	Risk, compliance, legal exposure	Deviations, risk heatmaps, obligations, expirations
Board Of Directors	Strategic Oversight	Top-value contracts, risk summary, revenue/spend-at-risk
Contract Managers	Operational Efficiency	Cycle times, SLAs, workflow aging, repository integrity
Sales Ops	Revenue Acceleration	Renewals, cycle time, deal exceptions, value by territory
Procurement	Spend Control & Supplier Risk	Spend analysis, renewals, supplier risks, savings
Requestors	Visibility & Deadlines	My requests, expirations, obligations, request status

# I...We...Want | Report Examples

## **The Classic...**

All Contracts Expiring and/or  
Renewing In Next XX Days

## **How 'Bout Them Obligations**

Missed Obligations & Risks Soon  
To Materialize

## **The Efficiency Hound**

How Long Does My Approval  
Process Take

## **Big Minds @ 50,000 Feet**

Top X% Of Active Contracts Which  
Show Contract Value

## **The Slice & Dice**

Show Me Contracts By Region Or  
Department Or Product Line Or...

## **Audit Anyone?**

I Need These Contracts With This  
Information & I Need Them Now

## **Exposure Avoidance**

Need To Know Which Contracts  
Have This Language Now

## **Ummm...Where Are We With**

I'd Like To See All Contracts Or My  
Team's Contracts By Status

## **Little Old Me...**

I Simply Want To See My Contracts,  
My Obligations, My Stuff

And These Are Just Some Examples, Which Don't  
Take Industry-Specific Reporting Into Account



04

# Delivery, Reports, Dashboards Or More

# Reports, Dashboards, Both?

## Reports Are Great When...

- Users Don't Like To Access "The System"
- Users Don't Have Access To "The System"
- The Formatting and/or Data Sources For The Report Are Very Complex
- There Is No Need To "Drill Down" Into Live Data
- Reports Are Easy To Configure – Tabular and Graphically Oriented

## Dashboards Are Great When...

- Users Are Comfortable With "The System"
- Users Can Access "The System"
- Dashboards Are Easy To Create/Adjust/Personalize
- Drill Down Support Is Important To Dive Into Data, Records, Etc.
- Dashboards Are Typically Secured In That People Only See Their Information
- Dashboards Are Better Suited For Taking Action As Links Can Be Easily Embedded

## Both Are Great When...

- One Recognizes That Reports and Dashboards Can Easily Coexist
- At times, Reports Are Better and At Other Times, Dashboards Are Better
- You Have The Ability To Provide Users With Both

# What Do We Mean By Actions?



**Automatically Send An Email Or  
Notification/Alert To Someone**



**Create, Update Or Delete  
Something In CLM Or Other System**



**Initiate A Workflow To Support  
Exceptions Or Confirmations**



**Let's Meet – Attention Is Needed  
Based Upon Report/Dashboard**



**Something Else**

05

# **Now What... Where Do We Really Start?**

# Back To Our Theme...Practicality

Contract Vital Signs | Who Needs What and When and In What Format?

Ideally, Reports & Dashboards Are Easy To Create...But If Not, Be Prepared to Custom Reports.

Ask, How Will This Make The Report/Dashboard User More Efficient?

What Requires Maintenance, The System(s) Or The Report? Ideally...The System(s)?

When Reporting/Dashboard Requirements Change, What Are The Implications?

And...What Actions Will The Report/Dashboard User Be Able To More Easily Take?

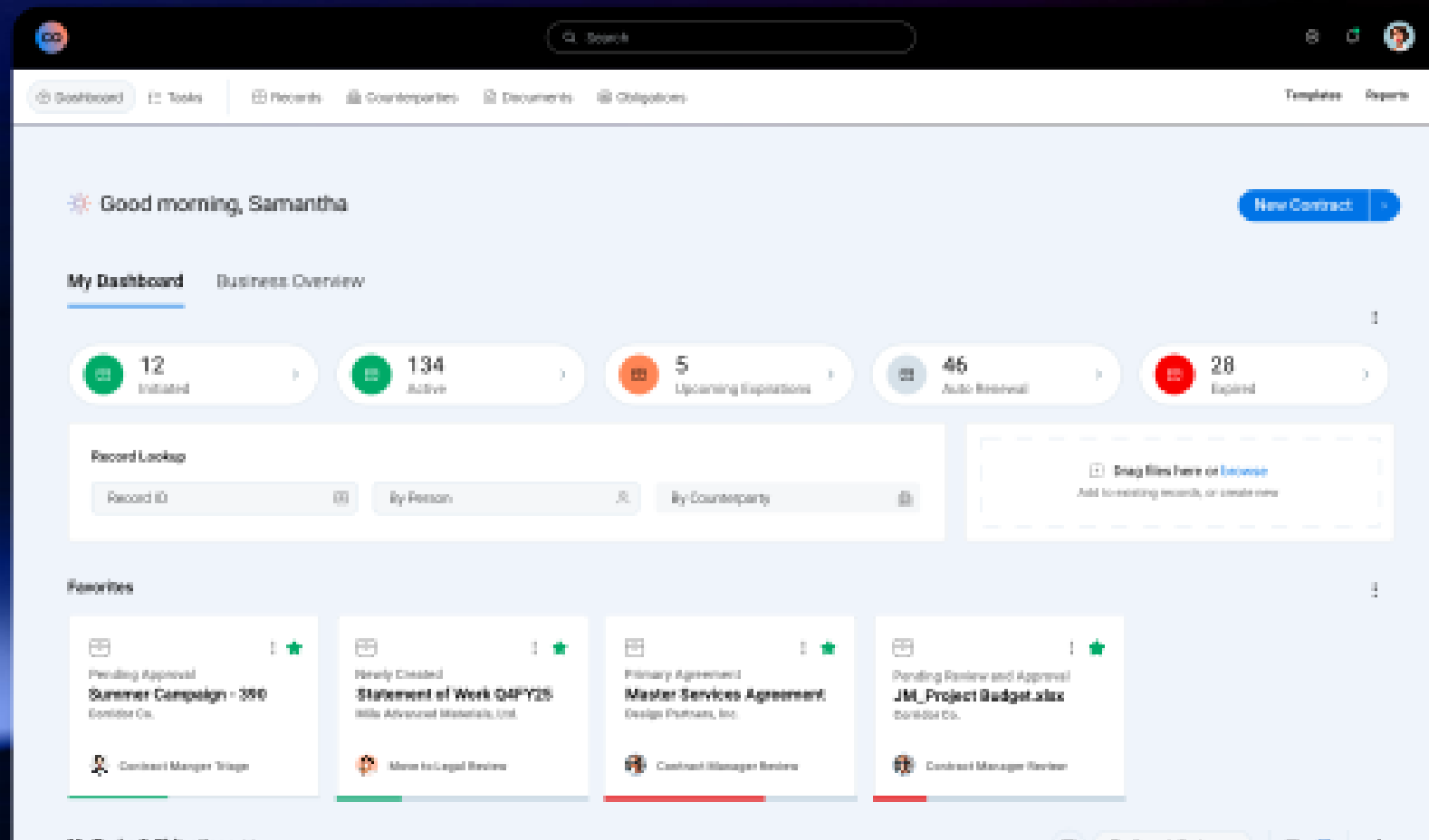
06

# **Contracts 365**

## **Intro & Demonstration**

# contracts<sup>365</sup>

Powerful contract management software  
for businesses that run Microsoft 365.



After 20 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.



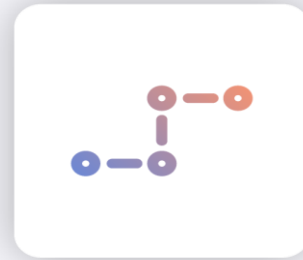
PLATFORM

**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

# contracts<sup>365</sup>

Works in all Microsoft cloud environments



Leverages apps people use every day



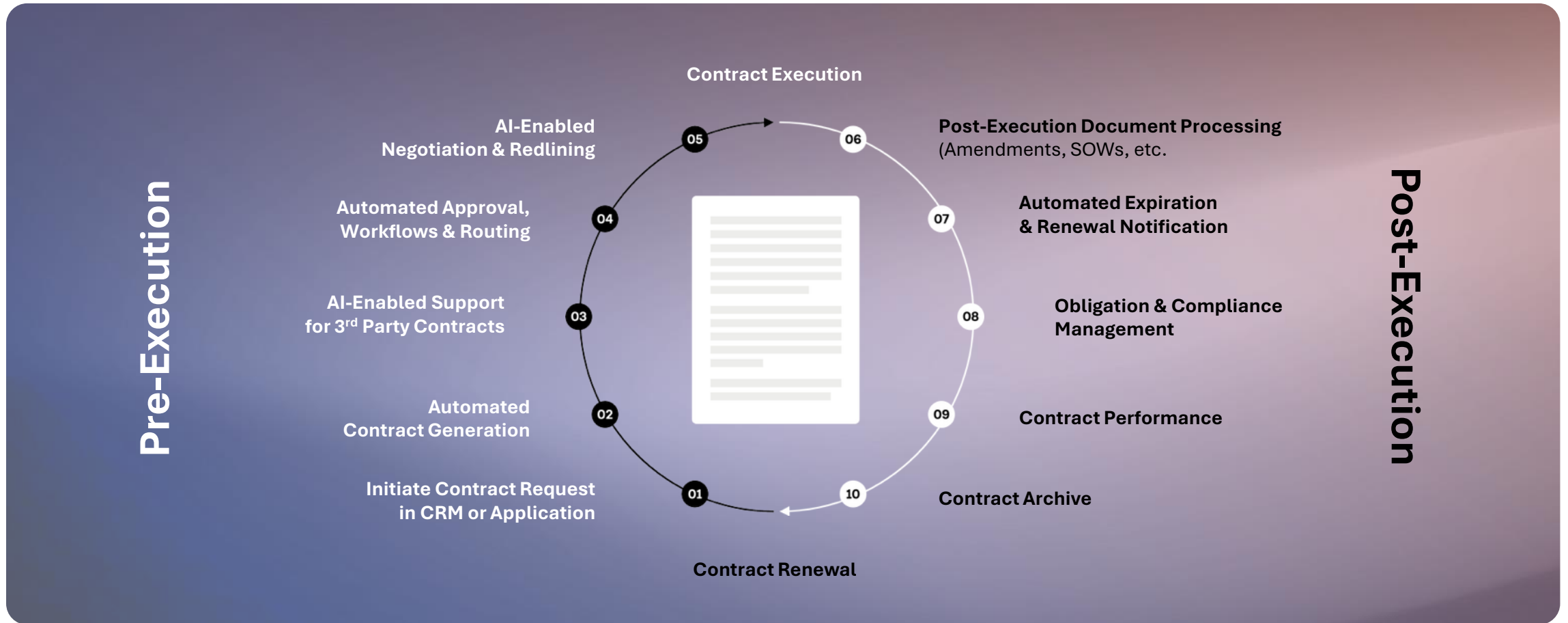
Key integrations make contract workflow easier



Advanced AI, data and security services



# 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

**Our Next Webinar—Reserve Your Spot Today!**

LIVE PANEL

# Is AI the Death of Contract Lifecycle Management?

January 13th • 11AM – 12PM Eastern



Lucy Bassli  
InnoLaw Group



Russ Edelman  
Contracts 365



Sally Guyer  
WorldCC



Mark Ross  
Deloitte Tax

CONTRACT



**How Can We Help?**

**Questions?**

Drop us an email: [info@contracts365.com](mailto:info@contracts365.com)

# Contracts 365 Reporting Demonstration



DEMO

## Contract Pro Dashboard

- ✓ Intro To C365 Dashboards
- ✓ Dashboard Widgets & Personalization
- ✓ Exploring Contract Specific Obligations



DEMO

## Risk Analyst Dashboard

- ✓ Different Role > Different Info
- ✓ Taking Action On Obligations



DEMO

## Reporting Center

- ✓ Tabular Reports
- ✓ Custom Reports (In Excel)
- ✓ Exploring Report Definitions



# Thank you!

contracts<sup>365</sup><sup>®</sup>