

contracts³⁶⁵[®]

Leveraging Microsoft 365 For Contract Management

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Introductions



Russ Edelman

Founder and
Chief Product Evangelist



Dave Sandstedt

Vice President
Marketing

What We'll Cover Today

01

Industry Data

- CLM Trends
- Key AI Trends

02

Why MS 365 For CLM

- MS 365 Building Blocks
- Going Native MS 365

03

C365 Introduction

- What Is Contracts 365 & Why We Built It
- The Role Of AI (& CLM Infrastructure)

04

30-Second Contracting

- A Day In The Life Demo of Contracts 365

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Average Contract Value Erosion 2014-2023



1%

(Conservative Estimate)

**For a \$100M Organization, Even 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% of Sales Cycle

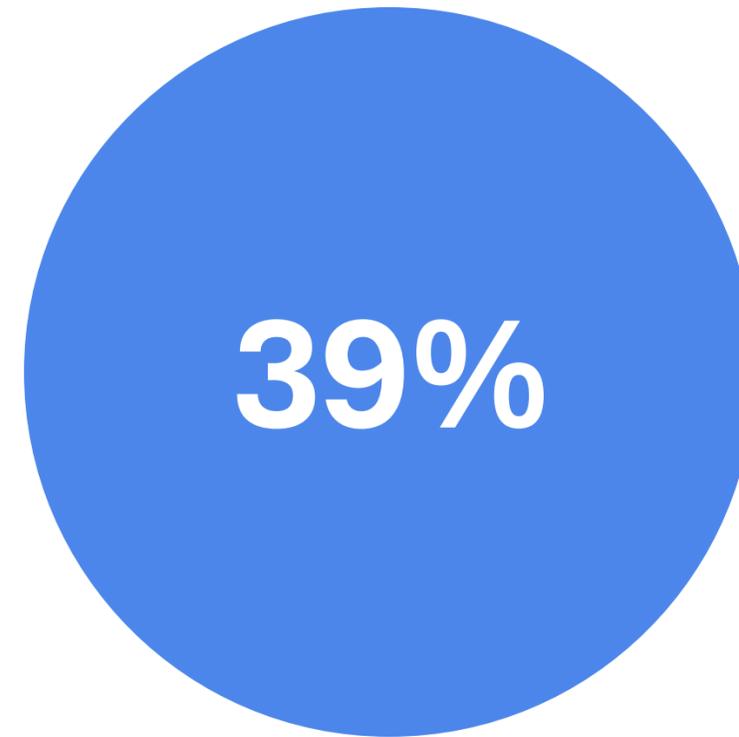
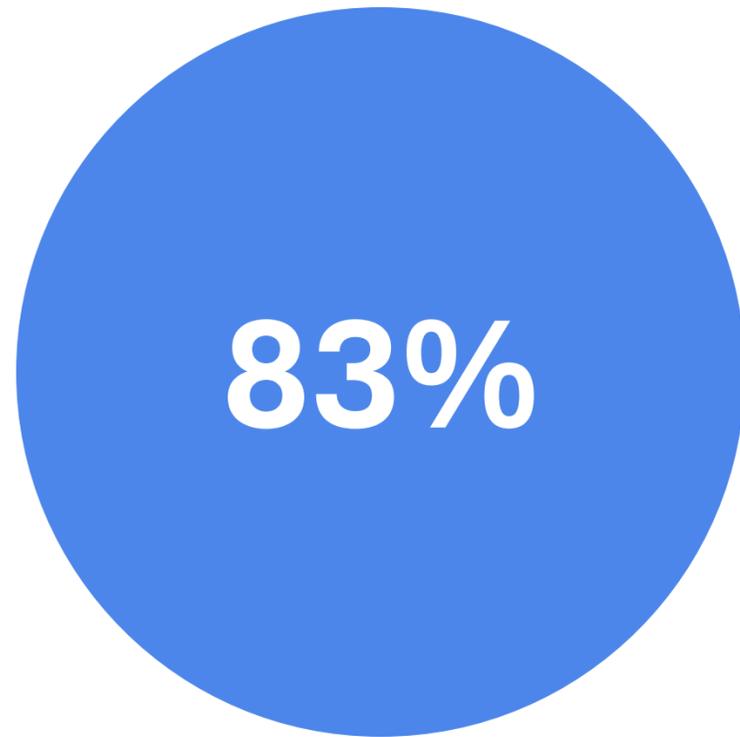
Consumed by the Contracting Process

\$3,000,000

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

(for businesses with 1,000 employees)

AI “Positive/Beneficial” Sentiment



2026 AI Projections

AI Becomes
Invisible

Make Or Break
For AI Agents

LLMs Drive
Scientific
Breakthroughs

Vibe Coding On
The Rise

AI Reasoning
“Levels Up”

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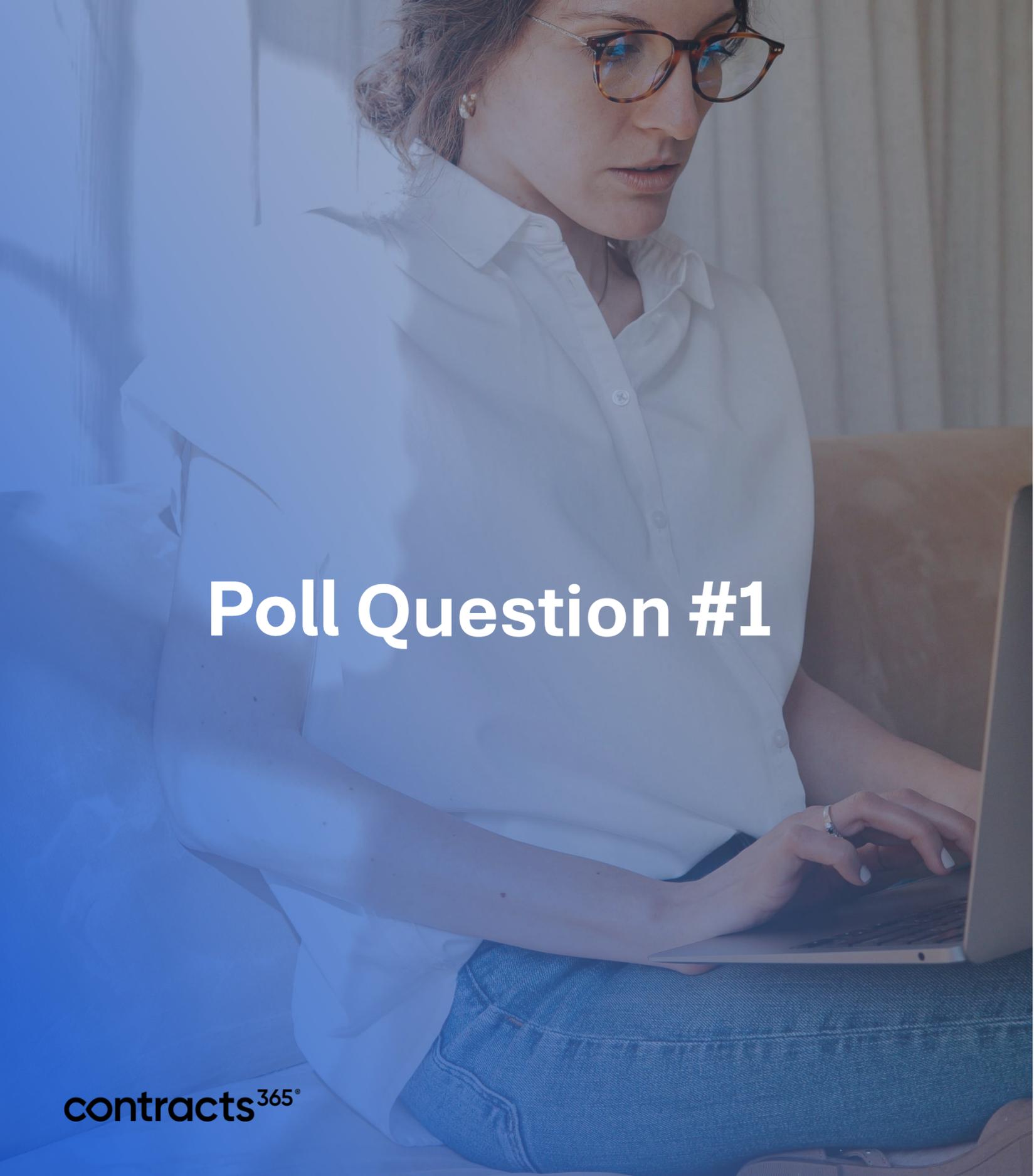
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Poll Question #1

Are you currently using a Contract Management System?

- ✓ None
- ✓ Exploring a CLM system
- ✓ Currently using and happy
- ✓ Currently using and not happy

Microsoft 365 – The CLM Foundation

Foundation Components

- The Gold Standard for Productivity Tools
- Global Scale & Unlimited Capacity
- Basic Repository In SharePoint On-Line
- Basic Document Assembly
- Extensive & All-Encompassing Security
- Extensible With Power Automate & Power BI For Dashboards
- AI For Metadata Extraction via Copilot and basic content comparison
- Microsoft Copilot & Agents For AI
- Expansive API For Development
- Continuous Evolution & Innovation

C365 Introduction (with Partners)

- CLM Specific User Experiences
- Predefined CLM Reporting & Dashboards
- Support For Complex Contract Relationships (Parent/Child Contracts, Related Items, etc.)
- CLM Specific Workflows & Integrations For Negotiation & E-Signature
- Advanced Document Assembly For All Document & Contract Types
- Advanced AI for Contracting Process
- Obligation & Compliance Management
- Certified Integrations With Other Systems (Dynamics, Salesforce, Adobe Sign, DocuSign)
- Leveraging Next Gen AI For Contract Specific Target Areas

Native Microsoft for Contract Management

Key Building Blocks

LoB Integration



Dynamics 365



Power Platform



salesforce



Adobe Sign

DocuSign

LoB Systems

Automation/Reporting/AI

Power Automate

Power BI

MS365 Copilot/Agents

Productivity Applications



Centralized Repository



Secured Cloud Platform



Microsoft Azure



Microsoft
Entra ID

Native Microsoft for Contract Management

Step By Step By Step

Test, Test & Test

Continually Innovate

Change Management

LoB Integration

1. Using Power Automate, APIs Integration Platforms or Microsoft-integrated applications, identify integration strategy
2. Configure and/or code the integration to support your business requirements
3. Be prepared to keep up with the latest APIs or other programming techniques to ensure the integration does not break

Automation/Reporting/AI

1. Immerse yourself into the world of Power Automate programming to build workflow and approval processes
2. Become fluent with Power BI and SharePoint Views for displaying content as appropriate and for scheduling reports
3. Learn about and build out Power Forms to have custom form experiences for your contract records and data

Productivity Applications

1. Integrate key applications into your solution and allow for users to work within “their” apps
2. Ensure that approvals and other key workflow activities are properly captured for audit purposes
3. Consider how Copilot (Knowledge Agents/Intelligence) will start to play a role into your contracting landscape

Centralized Repository

1. Build out document libraries and lists and determine how these support Contract Records and subordinate data
2. Establish all data fields, including data relationships
3. Design for scale in accordance with your organization’s volume and complexity requirements

Secured Cloud Platform

1. Define a security model that works in accordance with your company policies and meets business requirements
2. Ensure that Single Sign-On (SSO) is properly implemented and linked to your contracting process
3. Leverage user password management protections and proper security protocols

Native Microsoft for Contract Management

Step By Step By Step

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Continually Innovate

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1. Using Power Automate, APIs Integration Platforms or Microsoft-integrated applications, **identify integration strategy**
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Productivity Applications

1. Integrate key applications into your solution and **allow for users to work within “their” apps**
2. Ensure that approvals and other key workflow activities are properly captured for **audit purposes**
3. Consider how **Copilot/Agents** will start to play a role into your contracting landscape

Centralized Repository

1. **Build out document libraries and lists** and determine how these support **Contract Records Hierarchy**
2. **Establish all data fields**, including **complex data relationships**
3. **Design for scale** in accordance with your organization’s volume and complexity requirements

Secured Cloud Platform

1. Define a **security model** that works in accordance with your company policies and meets business requirements
2. Ensure that **Single Sign-On (SSO)** is properly implemented and linked to your contracting process
3. Leverage **user password management** protections and **proper security protocols**

Is Microsoft 365 Well-Suited For Contract Management?

Yes



Microsoft 365 is well suited for CLM in two capacities

Basic repository which doesn't require sophisticated CLM features

To serve as an underlying platform for more complex CLM features

No



Microsoft 365 is at its heart, a broad repository & collaboration platform

While “anything” can be done in Microsoft 365, you revert to building a product which requires on-going care, maintenance and never-ending innovation.

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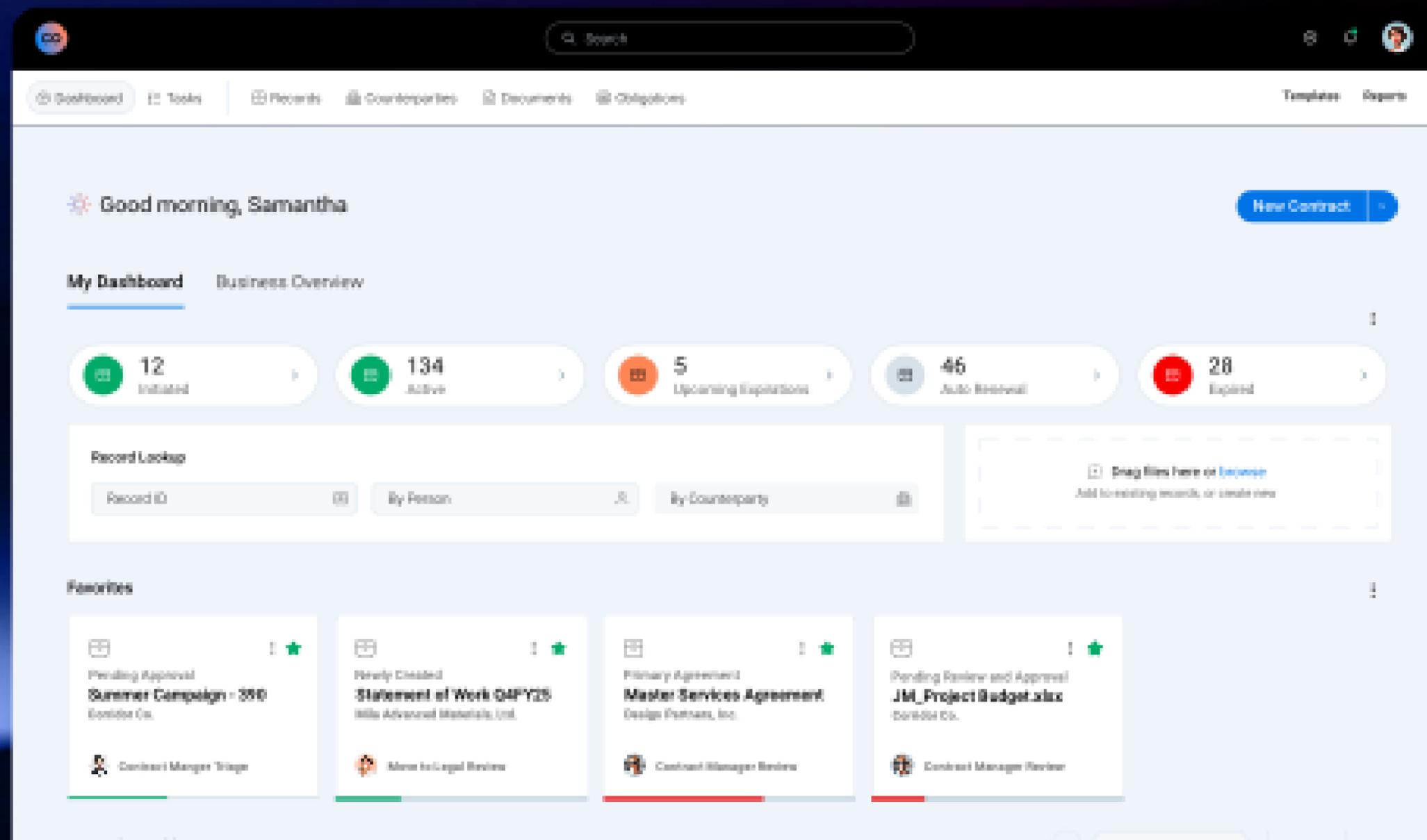
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Powerful contract management software
for businesses that run Microsoft 365.



Where Our Customers Live



**Energy &
Utilities**



**Entertainment &
Hospitality**



**Financial
Services**



Healthcare



Manufacturing



Nonprofits



**Pharma & Life
Sciences**



Real Estate



Retail & CPG



Technology

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

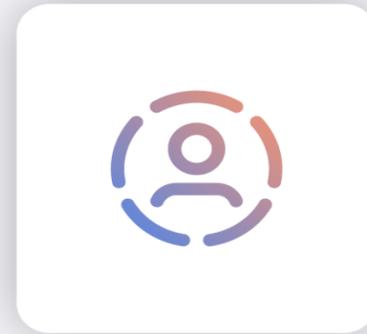
**Technical success does not
equal business success**

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



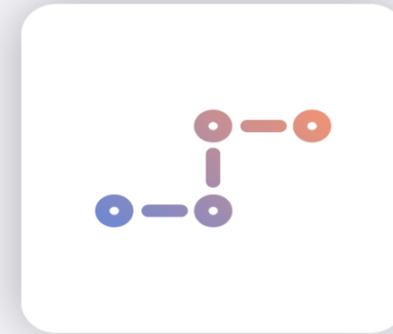
PLATFORM

Microsoft 365®



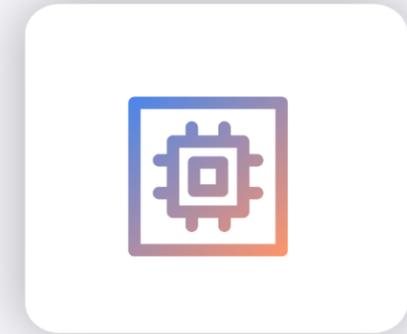
PEOPLE

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

contracts³⁶⁵

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

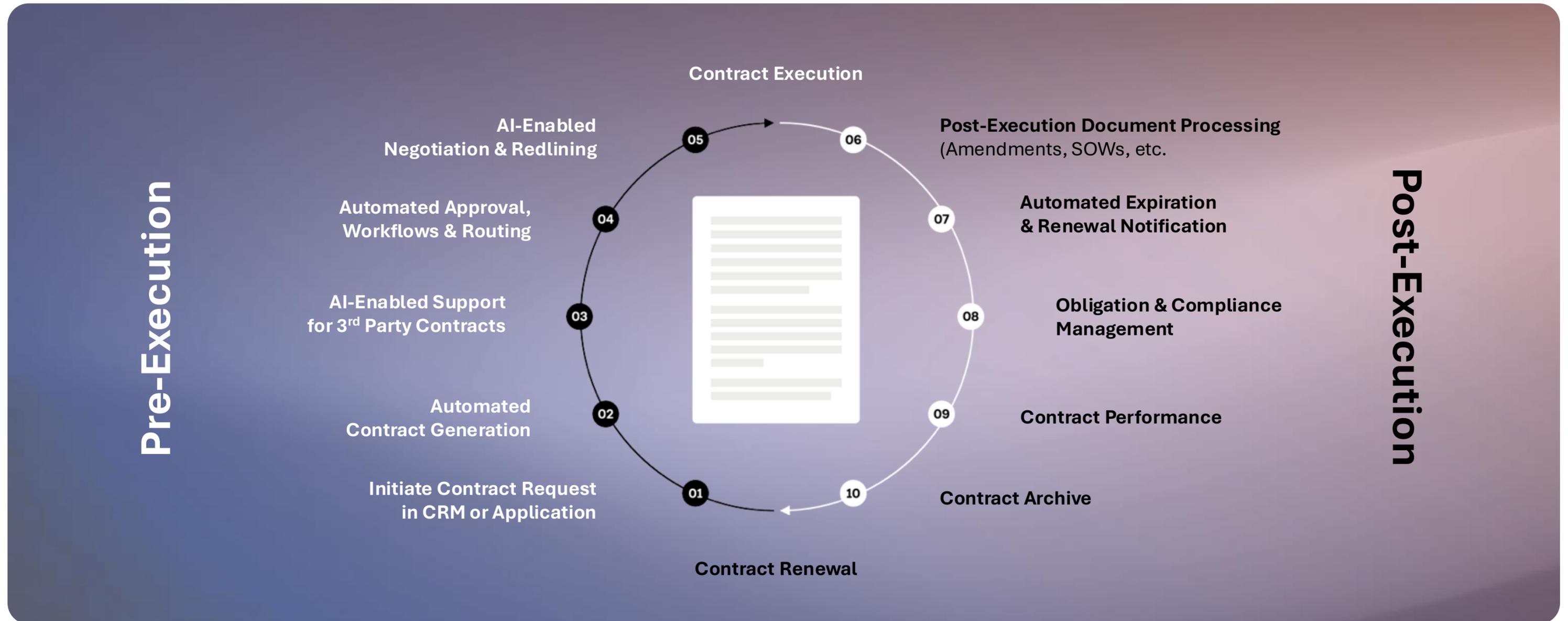


Microsoft
Defender



Microsoft
Sentinel

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



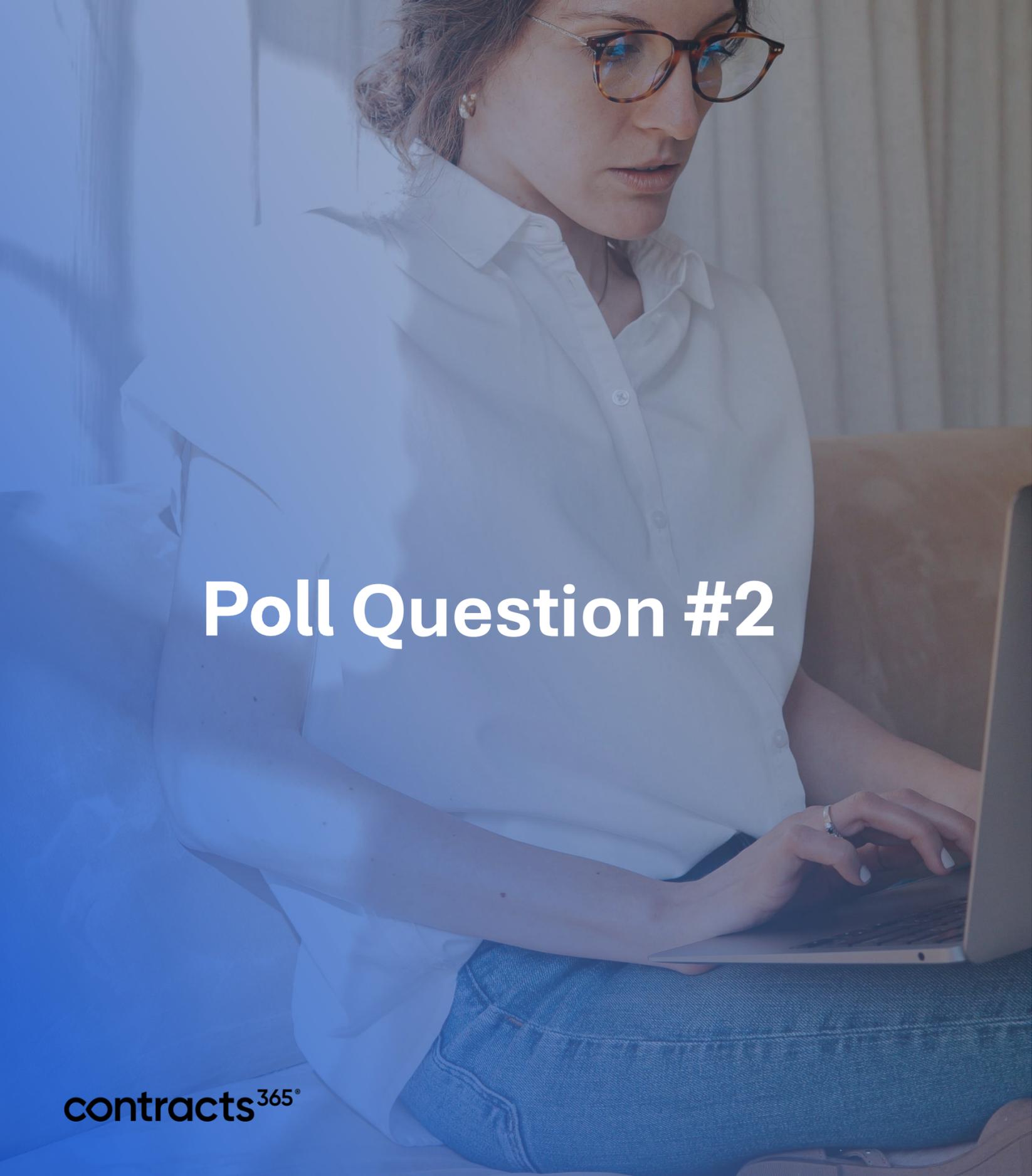
Real Estate

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



Corporate

Banking Services Capital
Investment Agreement Joint
Venture Agreement



Poll Question #2

When is AI functionality important a CLM system?

- ✓ Not Important Yet
- ✓ All Aspects of Contracting
- ✓ Data Extraction
- ✓ Negotiation
- ✓ Content Generation
- ✓ Other



AI Transforming the Foundation of CLM

- ✓ AI does not define Contract Management...it helps us to transform it.
- ✓ Two dimensions to AI & Contract Management; AI capabilities and CLM infrastructure. Make sure you have a clear grasp on them and how they interact.
- ✓ Security, IP & Ethical Protections are vital to the success of AI enabling CLM capabilities.
- ✓ “Trust and Validate” mindset critical to confirm that the AI-infused portions of CLM are properly validated before accepting the AI outputs.

Impact On Contract & Legal Professionals

AI Is A Net Positive

Strategic from Admin implications largely hinging upon how thoughtfully it is implemented and adopted.

Agentic AI Is Next Beyond Generative AI

Moving towards “orchestrated systems” acting autonomously which are more dynamic & context aware.

Contracting Is Repositioned Not Replaced

Focus is to move away from the routine activities and focus on proactive and strategic opportunities.

Volume & Complexity Drive AI Value

Organizations with large portfolios of contracts find AI especially useful when looking to streamline.

Contract/Legal Pros Must Upskill

AI fluency is and will continue to become increasingly in demand. Get curious as your first steps to fluency.

Segmentation & Customization Is Critical

Not all contracts are created equal & AI needs to be applied where appropriate for low/high value contracts.

AI Requires Human Oversight/Governance

AI-based systems require training and fine-tuning, monitoring and human-based validation.

Cross-System Data Integration Is Feasible

AI aids in connecting diverse data that is impacted by CLM systems for real-time monitoring & decision making.

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The Intersection of AI & CLM

AI Components

Copilot/Agents
Input/Commands
Output/Results
Security & IP
Ethics

10 High-Value Focus Areas

CLM Infrastructure

Metadata Construct
Visualize (Validate/Transform/Place)
Processing & Notification
Analytics & Reporting
Robust Security

Ten High Value Areas For AI & CLM

1

Metadata Extraction

Extract metadata with simplified visualization & data placement

2

AI Negotiation

Compare 3rd party agreement against playbook, gen AI to provide guidance and new language

3

Clause Extraction

Clause extraction for variant analysis, memorialization & processing

4

Obligation Extraction

Obligation extraction with standard attribution, jeopardy management and reporting

5

Contract Summarization

Generate document or metadata-based summaries for workflow review and execs

6

Contract Language Translation

Translate & save documents into alternative languages with auto-detection

7

Deep Search/Agents & Automation

Next gen AI-based search for private and public repositories & process automation

8

AI-Influenced Workflow

Dynamically detect workflow patterns and adjust approval processes accordingly

9

Contract & Clause Generation

"MS Copilot" Generative AI coupled with appropriate security, IP and ethics protections

10

Correspondence & Negotiations

Generate correspondence and negotiation strategies via memorializing and approvals

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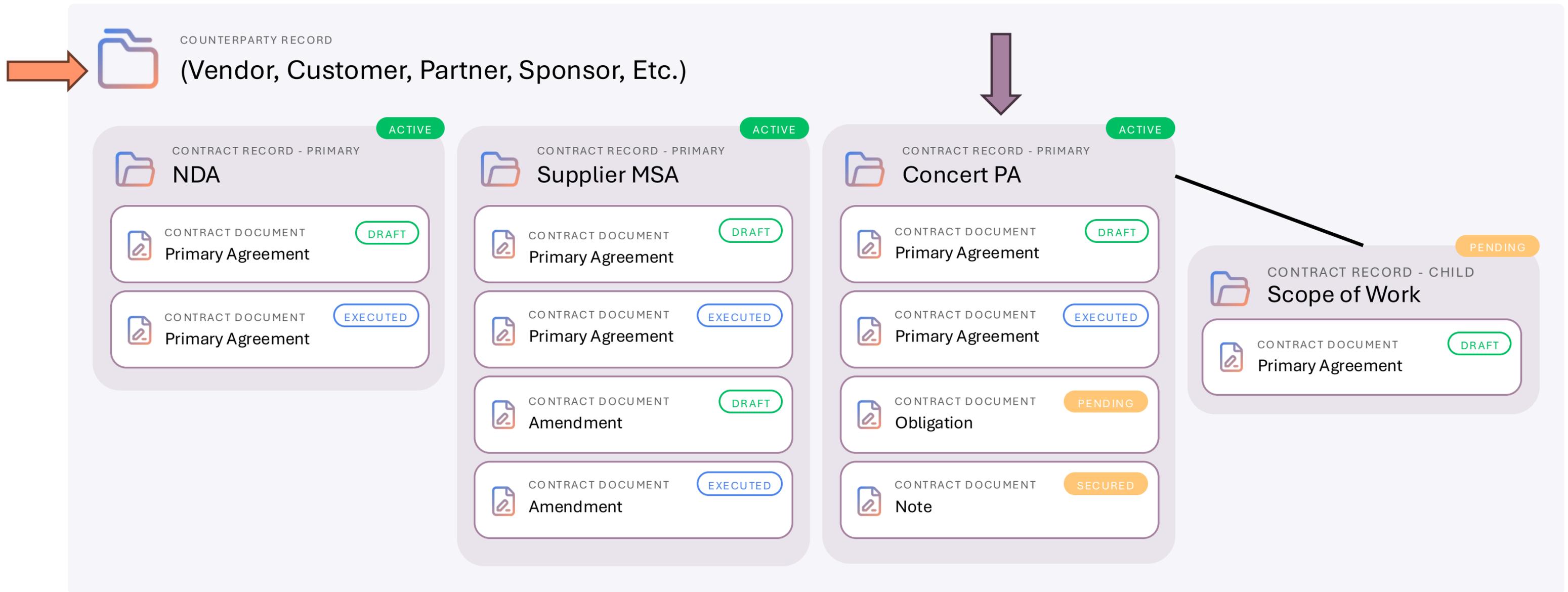
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Digital contracts have paper roots.

- Most of what we do in the digital world of Contracts 365 is drawn directly from the manual, paper processes of the past
- Except, now, we've streamlined, automated, and supercharged them
- But, when it comes to getting the backend set up, it's helpful to remind yourself of the “old way” we used to do things



Relationships: How Files are Organized



30-Second Contracting Demonstration



DEMO

Business User

- ✓ Simplified Access
- ✓ Personalized Dashboard
- ✓ Contract Intake With AI



DEMO

Contracts & Legal Team

- ✓ Access Contract Pro Dashboard
- ✓ Receive 3rd Party Contract
- ✓ Initiate Negotiation



DEMO

Risk Analyst

- ✓ Access Risk Analyst Dashboard
- ✓ Review Clause Deviations
- ✓ Review Overdue Obligations

Hey, thanks!

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