

contracts³⁶⁵[®]

WEBINAR

The Deep Dive:
Contracts 365 AI
Negotiation Companion

April 28, 2026

Introductions



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Powerful contract management software
for businesses that run Microsoft 365.

The screenshot shows the contracts365 dashboard interface. At the top, there is a search bar and navigation links for Dashboard, Tasks, Records, Counterparties, Documents, Obligations, Templates, and Reports. The user is identified as Samantha. The dashboard features a 'New Contract' button and a 'My Dashboard' section with a 'Business Overview' tab. The overview includes five key metrics: 12 Initiated, 134 Active, 5 Upcoming Expirations, 46 Auto Renewal, and 28 Expired. Below this is a 'Record Lookup' section with filters for Record ID, By Person, and By Counterparty. A file upload area is also present. The 'Favorites' section displays four contract items: 'Pending Approval Summer Campaign - 390' (Corridor Co.), 'Newly Created Statement of Work Q4FY25' (Mila Advanced Materials, Ltd.), 'Primary Agreement Master Services Agreement' (Design Partners, Inc.), and 'Pending Review and Approval JM_Project Budget.xlsx' (Corridor Co.). Each item has a star icon and a specific action button like 'Contract Manger Triage' or 'Move to Legal Review'.

What We'll Cover Today

01

**Negotiation Infrastructure
Fundamentals**

02

**Negotiation Setup
Practicalities**

03

**Part 1:
Negotiating A Contract**

04

**Part 2:
Obligation Extraction**

05

**Part 3:
Clause Deviation**

06

**Contracts 365
Overview**

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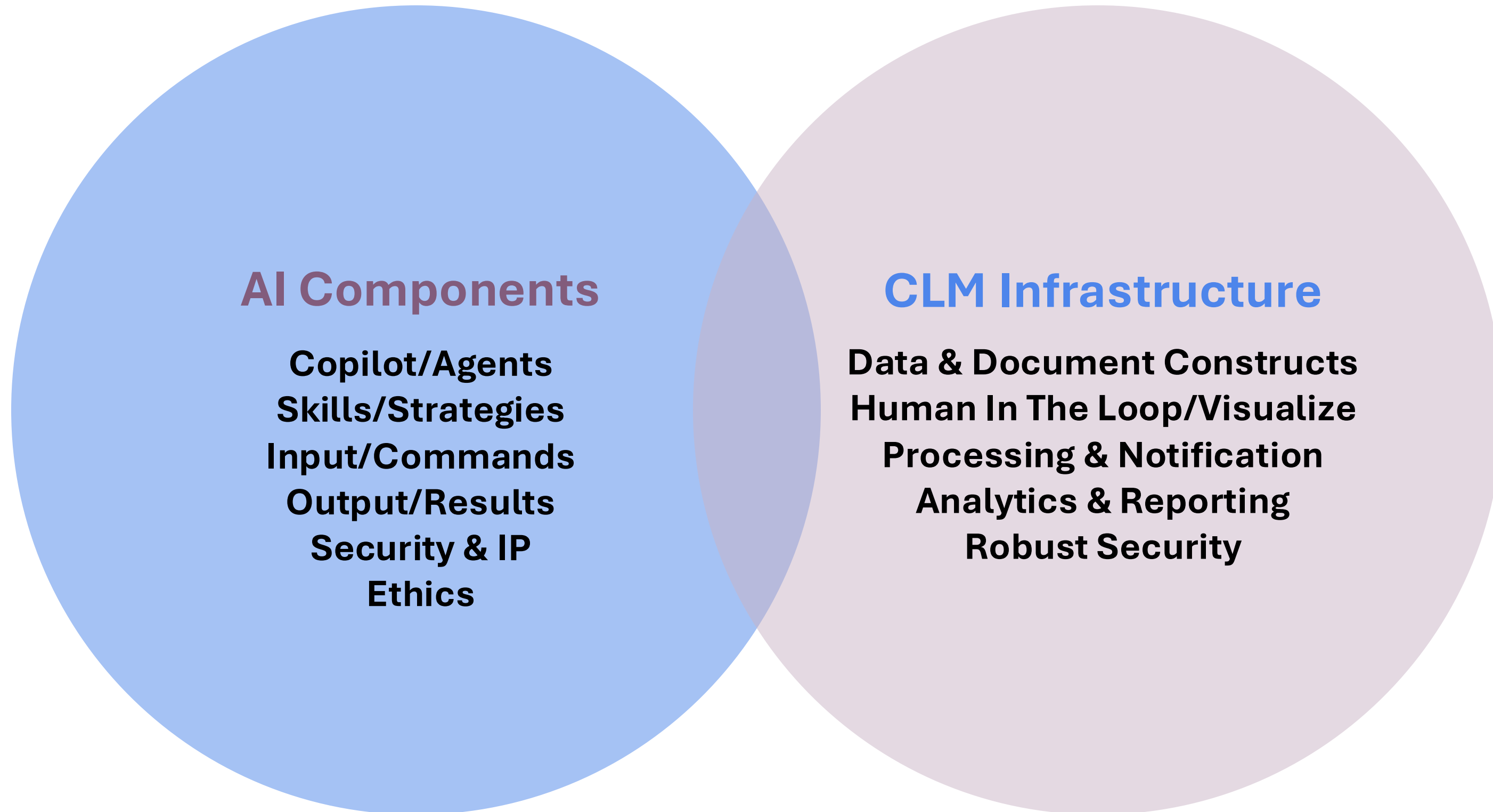
05

**Part 3:
Clause Deviation**

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**Contracts 365
Overview**

The Intersection of AI & CLM

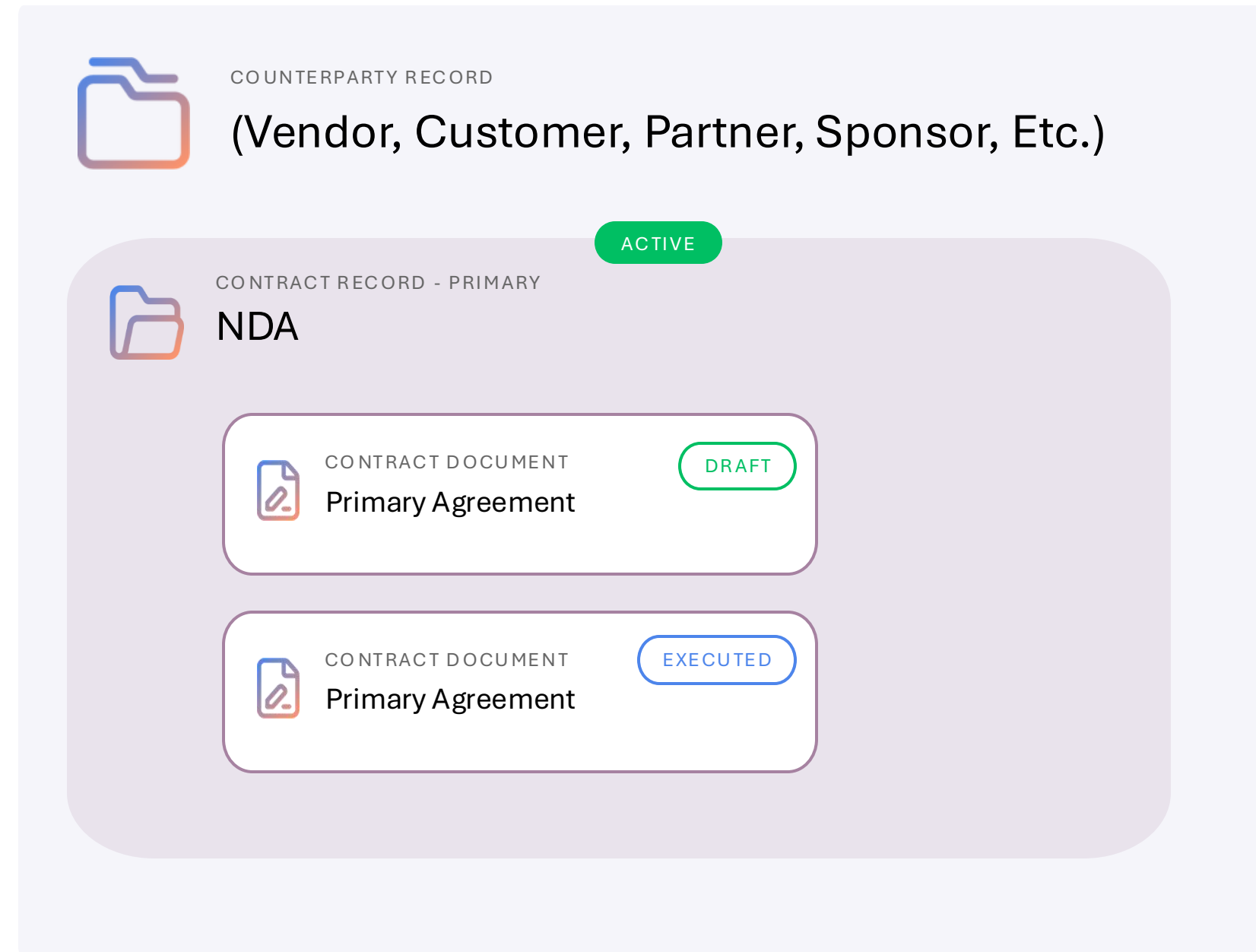


Data & Document Constructs

Overview

Storing and relating the data and documents together within a centralized repository becomes a critical aspect of effectively negotiating contracts.

If centralization and standard (meta)data are not established, then there is no consistency, which leads to inconsistent storage and findability with no mechanism to validate key data.



Visualize (Human In The Loop)

Overview

We count on AI to perform a lot of the heavy lifting; however, legal expertise remains a necessity to ensure that AI processes properly.

To ensure this takes place, there is a consistent need to easily see how AI is impacting the negotiation process by visualizing information for verification & action.

Supplier shall comply with applicable laws in the provision of services. Customer shall comply with all laws relating to its use of the services, including data protection and export control regulations.

7. Confidentiality

Each party shall maintain the confidentiality of the other's proprietary information. Supplier's obligations are limited to using reasonable care and do not apply to information that becomes public or is disclosed by Customer.

Confidential | Do Not Distribute

Page 1

Supplier Master Services Agreement

8. Security Compliance

Supplier shall implement reasonable administrative, technical, and physical safeguards to protect Customer data. However, Supplier does not guarantee against all security incidents

CONFIDENTIALITY (4)

In Progress Review Clause

Rebalance Security section to avoid overbroad Supplier no-liability position

Revise to (1) remove/limit the broad Supplier liability disclaimer so Supplier remains responsible for unauthorized access caused by Supplier systems, personnel, or failures to...

Review Clause

Strengthen Supplier confidentiality obligations and narrow overbroad exceptions

Revise to (1) remove the carve-out that eliminates Supplier confidentiality duties for information "disclosed by Customer" (it is overly broad and could swallow the obligation), (2...

Review Clause

Compelled disclosure clause improperly waives Supplier liability

Remove the blanket liability waiver for compelled disclosure and strengthen the compelled-disclosure process by: 1) deleting the statement that Supplier has no liability for compelled...

Review Clause

Return/destruction allows Supplier retention without safeguards

Tighten Supplier's ability to retain confidential information by: 1) limiting retention to the minimum required by law (not discretionary archival retention) and requiring continued...

Processing & Notification

Overview

Once AI performs its critical processing, the need for defined and predictable process automation must be readily available with a streamlined and simplified user experience.

The screenshot displays a contract management interface with a workflow at the top: Contract Manager Triage Task | Standard - Non-Email Initiated, Requestor Manager Task Assignment, Negotiate with Counterparty, Send for Electronic Signature, Data Validation, and Complete. Below the workflow, there are tabs for Draft Documents, Executed Documents, Draft Amendments, Related SoWs, Child Contracts, Workflow, Other Tasks, and E-mail. The main content area shows a table with 1 item:

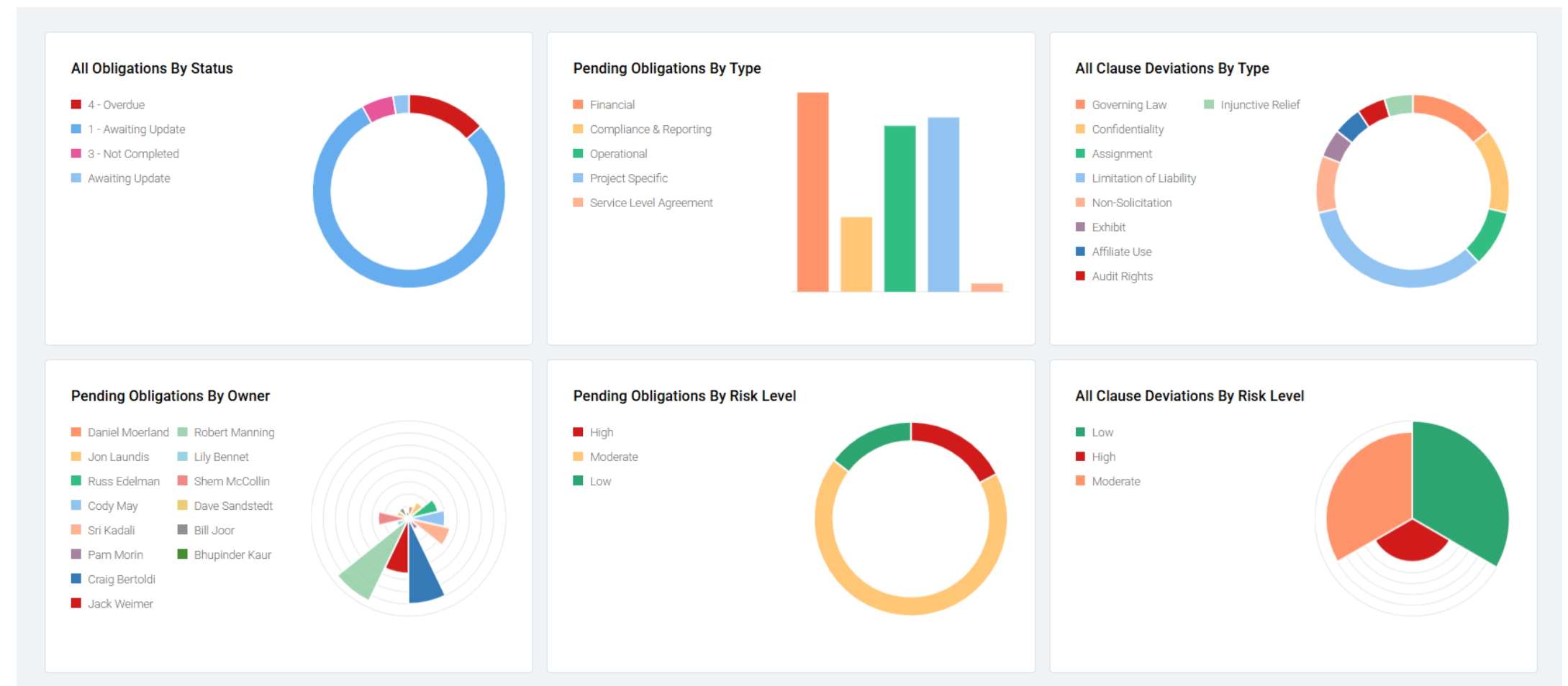
Contract Document Name	Version	Document Status	Modified	Description/Comments	Document Type
JAManufact - Confidentiality Agreement - 1077.docx	0.3	Draft	04/07/2026		Primary

On the left side of the interface, there is a sidebar with sections for Contract Team, Contract Record Details, and Metrics. The Contract Record Details section includes fields for Primary Property, Additional Properties, Legal Entity (Contracts 365, Inc.), Original Contract Value, Current/Cumulative Contract Value, Term Type (Fixed Term), Effective Date (04/07/2026), and Current End Of Term Date. There is also a link for All Properties.

Analytics & Reporting

Overview

As data is AI processed and extracted, there is a consistent need to ensure that there is an opportunity to analyze this data through dashboards and reporting mechanisms that are easily consumable by people.



Robust Security

Overview

AI Processing must fall within the appropriate data protection mechanisms that are vital to ensuring confidential information is not shared for training of other models or customer systems.

CONTRACT REPOSITORY

Contract storage in your Microsoft 365 cloud.

- ✓ Retain ownership of your contracts & data
- ✓ Your documents/data DO NOT train ANY models
- ✓ Increased security, visibility, control
- ✓ Vetted by your IT & Sec leaders
- ✓ Rapid adoption of data governance policies

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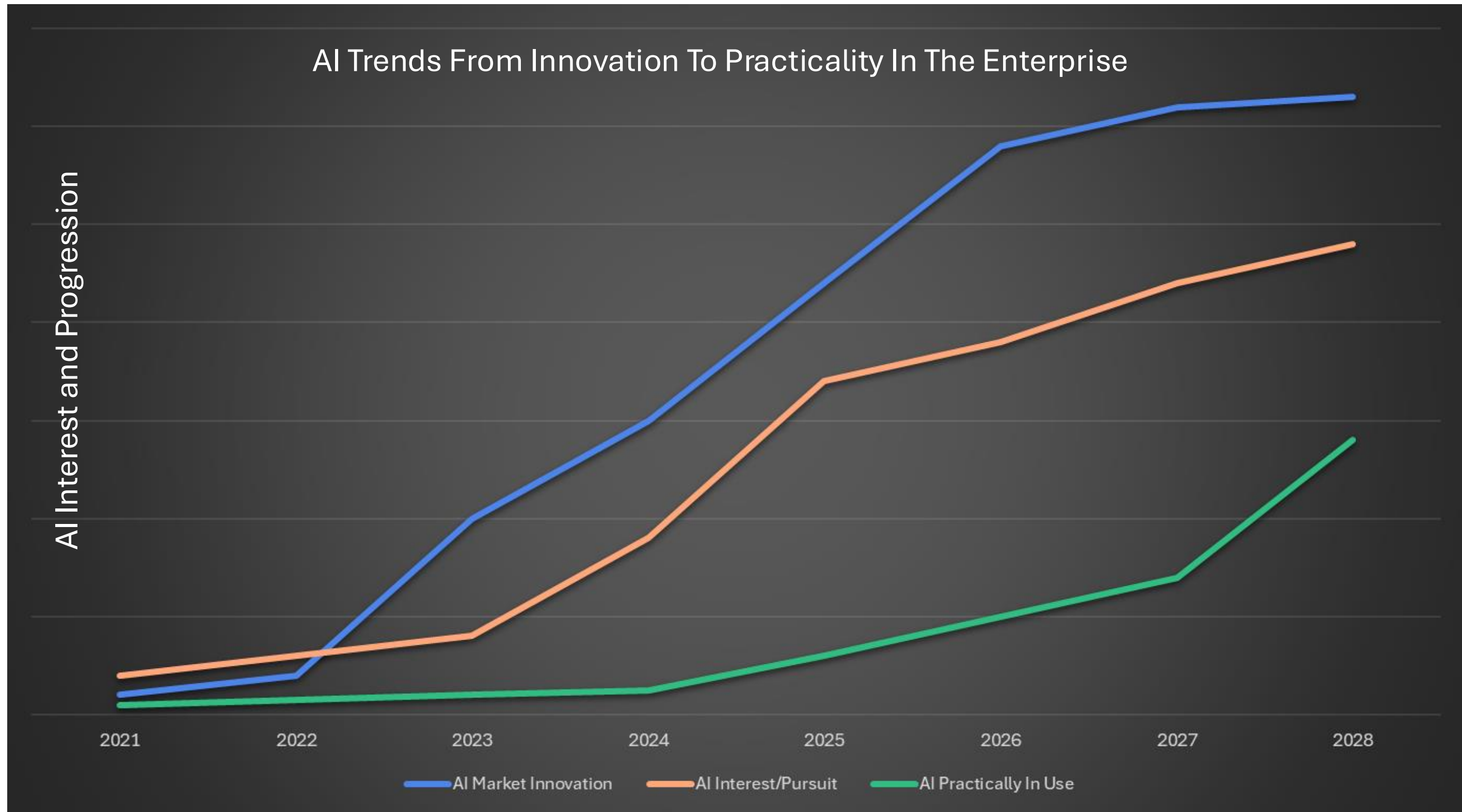
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**Contracts 365
Overview**

Practical Considerations For AI & CLM



Practical Considerations For AI & CLM

1 Quality/Recall Of AI Suggestions/Language

The quality and consistency of the suggestions and revised language varies considerably based upon a number of factors, including LLM's being used, Fine Tuning and other factors.

3 Setup & Maintenance Takes Effort

When preparing to use AI for Contract Management, there is an initial and on-going effort required to ensure that your content (e.g. clause playbooks, fine tuning, etc.) is properly established and remains current.

2 "Training" Or "Skills" | Finding The Balance

For all of the appropriate reasons, few if any organizations want to share their content to train public LLMs or share with other organizations. Yet, there is now a growing need to "train" AI systems (introduce skills) to learn from content.

4 Don't Chase Butterflies | Iterative Innovation

AI is arguably moving faster than any other technology innovation. Stay focused on your primary use cases and plan to iterate and evolve.

Practical Considerations For AI & CLM

5 Confidence Levels

As data is AI-Processed, an indicator should be made available to indicate the confidence level of the extraction. Through “suggestions”, users can easily discern.

7 Hierarchical Data Mapping & Placement

AI-Processed data will be placed into the appropriate hierarchical location. For example, a new counterparty will be added in the counterparty list and Contract Type, Effective Date, Amount will be placed into the Contract Record.

6 Real-Time Document Access & Highlighting

Users should be able to easily see the source document / content and be taken to immediately to that location for verification and/or action.

8 Automated Relationship Binding

Once AI-Processed data is written into the correct locations of the hierarchy, the data is then bound together to allow for the necessary and simplified linking experience. This allows users to see actual documents related to contract records which are in turn, related to counterparties.

Practical Considerations For AI & CLM

9 Field Validation

When raw text is AI-Processed, such as a counterparty name and address, the data must be validated against counterparty lists, state/province lists, country lists & more.

11 Currency Value Format & Validation

Like “date” information, values can be spelled out and formatted differently and these need to be transformed and then validated to achieve a higher level of accuracy.

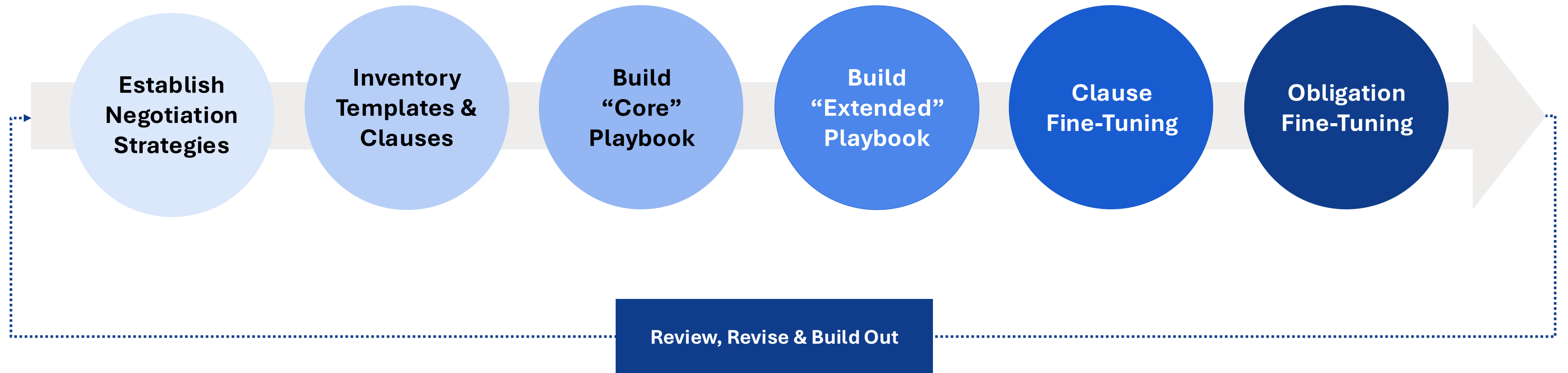
10 Date Format Transformation & Validation

AI-Processed date information (spelled out, formatted differently) needs to be transformed into an actual date field & then validated to ensure that the date is accurately stored.

12 Dynamic Creation Of New Values

When a new AI-Processed value (e.g. new counterparty), the extracted information can automatically populate the validation lists which can influence workflow and other downstream activities.

Setup



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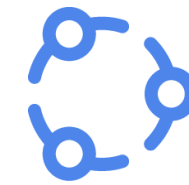
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**Contracts 365
Overview**

Part 1 | Negotiate A Contract

Thoughts To Consider

- Support For 3rd Party Or Internal Paper
- Primary Positions, Along With Fallback Support
- Synthesize Before “Blanket Swap”
- Collaborating With Others In Your Organization
- How Best To Send Out
- Incorporating Relevant Language Into Your Playbook



DEMO

Scenario/Steps

- ✓ Review Negotiation Strategies
- ✓ Review Clause Playbook
- ✓ Open Negotiation KPI Tile
- ✓ Contract From 3rd Party Review
- ✓ Suggestions
- ✓ Rewrite & Chat
- ✓ Assign Suggestions

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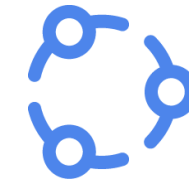
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**Contracts 365
Overview**

Part 2 | Extracting Obligations

Thoughts To Consider

- Return To CLM Infrastructure | Need To Store Obligations
- Obligations For Your Company Or Counterparty
- Obligation Notifications, Reporting & Alerting
- Obligations Can Turn Into Risks (Or Opportunities)
- Some (Many) Contracts do not have formal Obligations



DEMO

Scenario/Steps

- ✓ Initiate “AI-Processed” Obligations
- ✓ Save Obligation(s)
- ✓ Review Obligations Within Contract Record
- ✓ Review When Obligations Turn Into Risks

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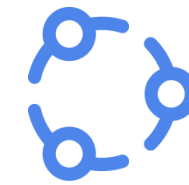
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**Contracts 365
Overview**

Part 3 | Extracting Clause Deviations

Thoughts To Consider

- How To Define A Clause Deviation
- Who Cares About Deviations & Why
- Deviation Reporting & Dashboards
- Why AI-Based “Deep Search” Is Not Yet Reliable



DEMO

Scenario/Steps

- ✓ Review AI-Processed Deviations Against Playbook
- ✓ Extract Deviations & Review In Context Of Contract Record
- ✓ Dive Into Risk Analyst Dashboard

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WEBINAR

Seamless Sales:

Contract Management In Microsoft Dynamics 365

May 19th • 11:00AM Eastern

Discover how leading organizations close more deals at a faster rate by optimizing the integration of CLM and CRM applications.



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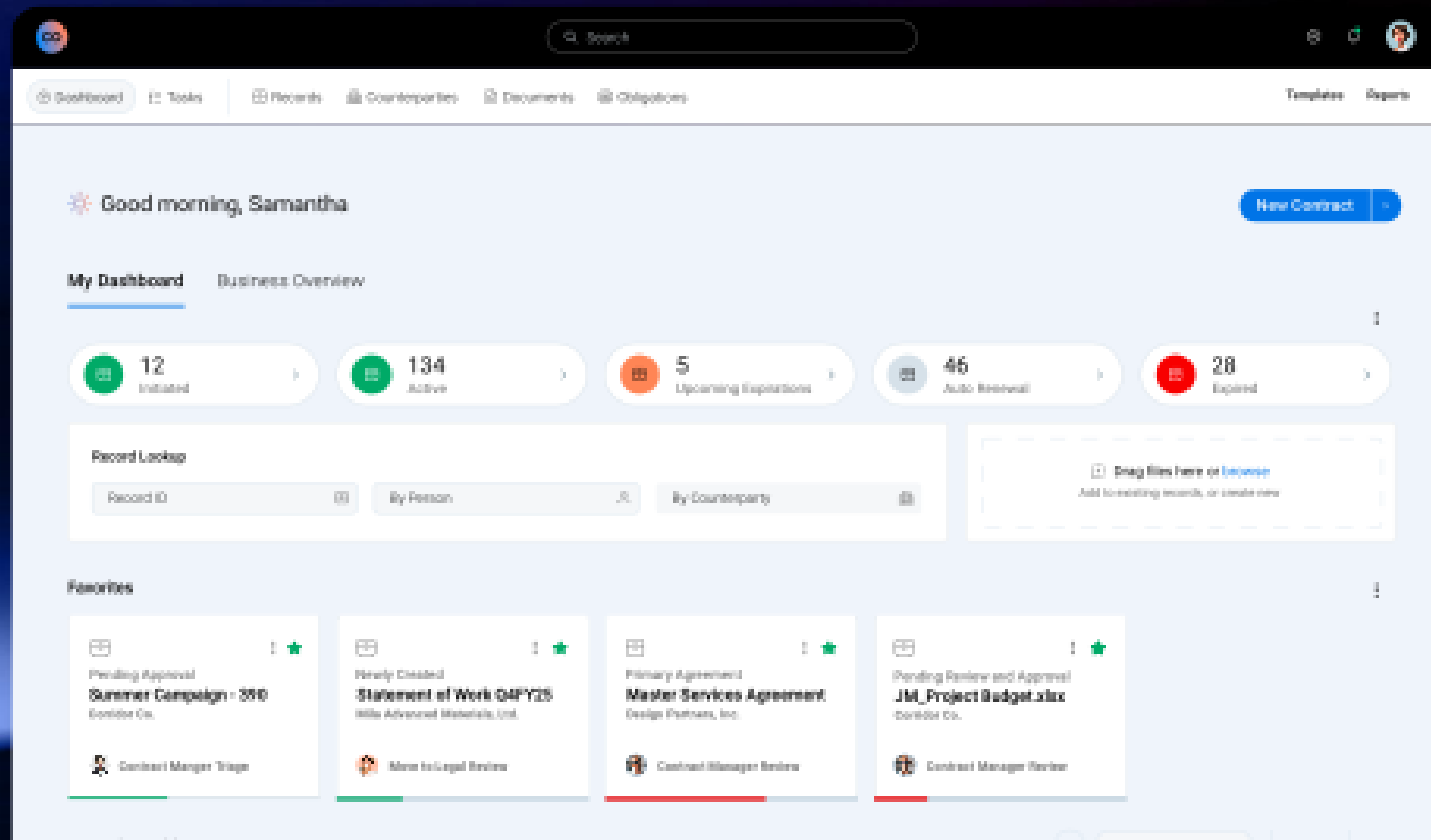
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**Contracts 365
Overview**

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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

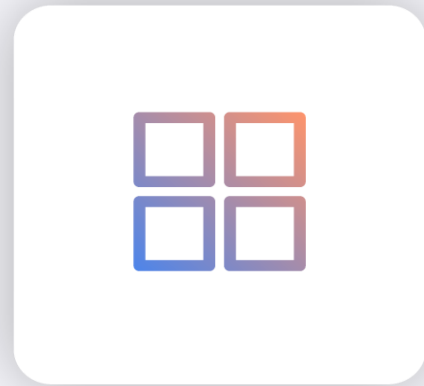


Technology

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.



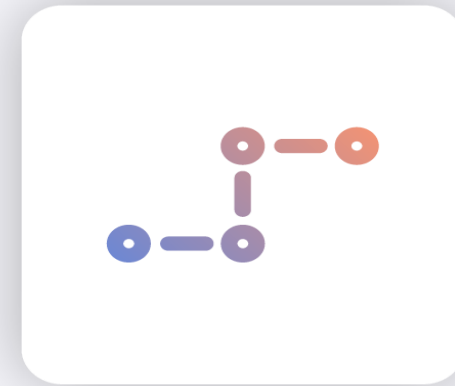
PLATFORM

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

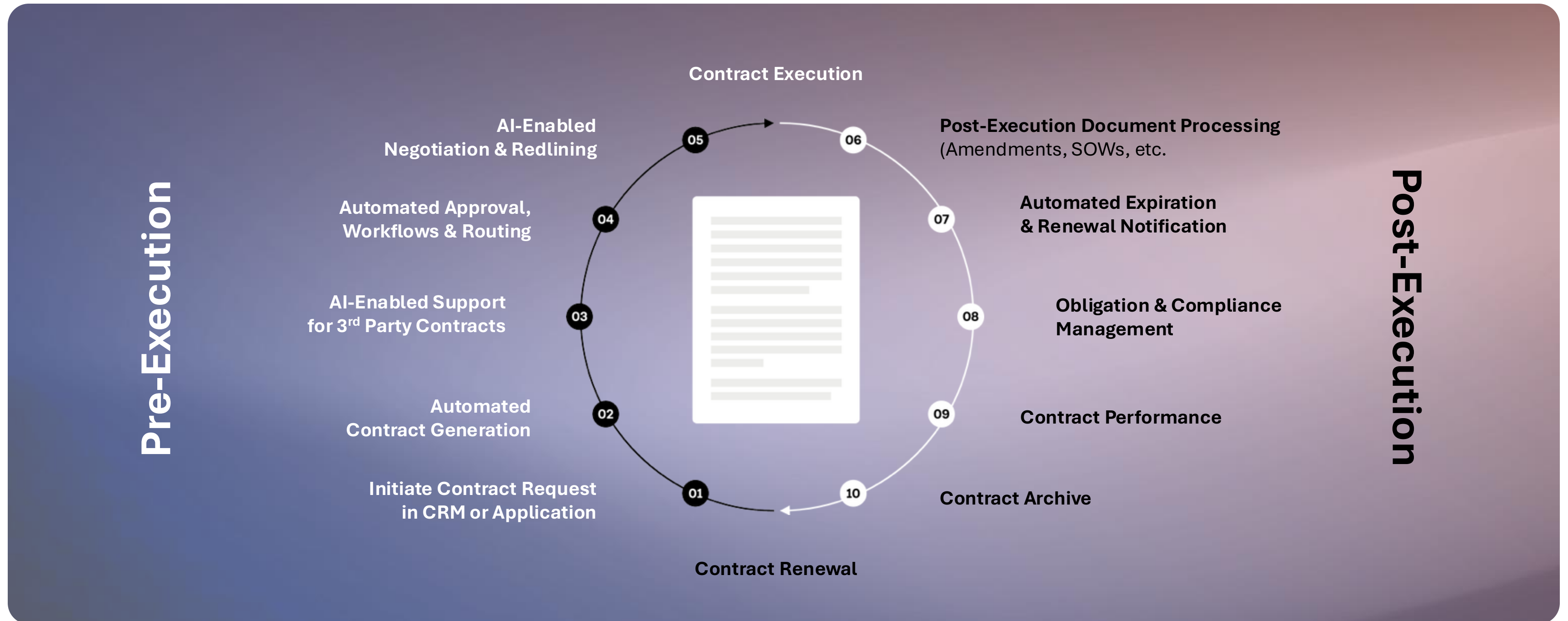


Microsoft
Defender



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

Hey, thanks!

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