

**contracts**<sup>365</sup><sup>®</sup>

WEBINAR

# Leveraging Microsoft 365 For Contract Management

June 18, 2026

# Introductions



**Russ Edelman**

Founder and  
Chief Product Evangelist



**Dave Sandstedt**

Vice President  
Marketing

# What We'll Cover Today

01

## Industry Data

- CLM Trends
- Why CLM Matters

02

## Why MS 365 For CLM

- MS 365 Building Blocks
- Going Native MS 365

03

## The Role Of AI (& CLM Infrastructure)

- Initial Intersection Points
- The rise of BYOAI

04

## C365 Introduction

- What Is Contracts 365  
& Why We Built It

05

## 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**

**\$3,000,000**

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

(for businesses with 1,000 employees)

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## Poll Question #1

### **Are you currently using a Contract Management System?**

- ✓ No, Not Using One
- ✓ 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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### 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
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# Is Microsoft 365 Well-Suited For Contract Management?

Yes

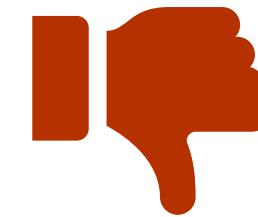


**Microsoft 365 is well suited for CLM in two capacities**

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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## Poll Question #2

### When is AI functionality important in a CLM system?

- ✓ All Aspects of Contracting
- ✓ Data Extraction
- ✓ Negotiation
- ✓ Content Generation
- ✓ Not Important At This Time



## 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.
- ✓ “Human-in-the-loop” mindset critical to confirm that the AI-infused portions of CLM are properly validated before accepting the AI outputs.

# The Initial Intersection of AI & CLM



# Ten Initial 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

# The Next Intersection of AI & CLM

## **BYOAI**

**(Bring Your Own Artificial Intelligence)**

How Does Microsoft Fit Into  
A **BYOAI** Strategy?

# BYOAI Defined In The Context Of CLM

## BYOAI

“Point” Solutions From Microsoft, Microsoft Partners or 3<sup>rd</sup> Parties for key AI processes such as **Negotiation** or **Advanced RAG Search**

## BYOAI & CLM Intersection Points

## CLM Infrastructure

**Clause Playbooks**  
**Skills & Strategy Persistence**  
**Alternative Authoritative Source Connectors (MCP)**  
**AI Based Searchability (MCP)**

Centralized/Secured Repository

Metadata Construct

Visualize (Validate/Transform/Place)

Processing & Notification

Analytics & Reporting

Robust Security

# Today's Gap between BYOAI & CLM Systems

Contract  
Lifecycle  
Management  
System(s)



 Microsoft

OpenAI

ANTHROPIC

 LexisNexis



THOMSON REUTERS

Harvey

 Spellbook

LEGORA

DRAFTWISE

 Ivo

 LexCheck

 BLACK BOILER

# BYOAI & CLM Initial Intersection Points

## Governance for AI & CLM Usage

Seamless Contract Storage From BYOAI Into CLM Repository

Seamless File Access From CLM Repository Within BYOAI

Fully Integrated Version Management Between BYOAI & CLM

Negotiation Process & Outcomes Influence Approval Workflows

Clause Playbook Access & Management

Blended Access To Primary & Alternative Authoritative Sources

Deep (AI-Based) Search Access To CLM Content With Meaningful & Secure Links

Collect disparate communications (email, chat, text) to provide comprehensive story of contract

## Comprehensive Audit History

# Examples Of Alternative Authoritative Sources

Company	Content Available
Thomson Reuters	Standard clauses, annotated templates, drafting notes, negotiation guidance
LexisNexis	Clauses, precedents, forms, checklists, multi-jurisdiction resources
Westlaw (TR)	Precedent clauses + standard documents
vLex (Clio)	Precedents, case-derived clauses, jurisdictional content
Bloomberg Law	Model clauses, sample agreements, annotated precedents
International Comparative Legal Guides (ICLG)	Cross-border legal clause guidance + jurisdiction comparisons
The Chancery Lane Project	Open-source, purpose-driven clauses (ESG/climate)
OneNDA / OneSaaS / OneDPA (Contract Standards)	Standard form clauses/templates (community-driven)
Practical Law Company (PLC – legacy TR brand)	Historically curated clause banks

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# contracts<sup>365</sup><sup>®</sup>

Powerful contract management software  
for businesses that run Microsoft 365.

The screenshot displays the contracts365 software interface. At the top, there is a search bar and navigation tabs for Dashboard, Tools, Records, Counterparts, Documents, and Obligations. The main content area features a personalized greeting, "Good morning, Samantha," and a "New Contract" button. Below this, there are two tabs: "My Dashboard" (selected) and "Business Overview". The dashboard includes five key metrics: 12 Initiated (green), 134 Active (green), 5 Upcoming Expirations (orange), 46 Auto Renewal (blue), and 28 Expired (red). A "Record Lookup" section offers filters for Record ID, By Person, and By Counterparty. To the right, there is a dashed box for uploading files with the instruction "Drag files here or browse". The "Favorites" section at the bottom lists four items: "Pending Approval Summer Campaign - 350" (Contract Co.), "Newly Created Statement of Work Q4FY25" (Wills Advanced Materials, Ltd.), "Primary Agreement Master Services Agreement" (Design Partners, Inc.), and "Pending Review and Approval JM\_Project Budget.xlsx" (Contract Co.). Each favorite item includes a star icon and a "Contract Manager Review" button.

# Where Our Customers Live



**Energy &  
Utilities**



**Entertainment &  
Hospitality**



**Financial  
Services**



**Healthcare**



**Manufacturing**



**Nonprofits**



**Pharma & Life  
Sciences**



**Real Estate**



**Retail & CPG**

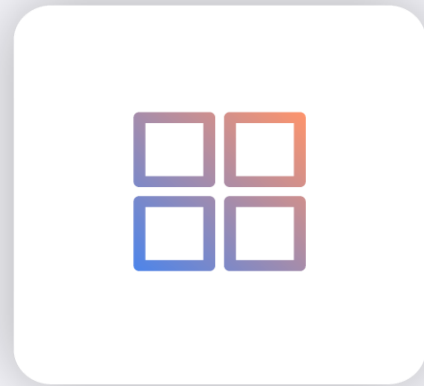


**Technology**

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.



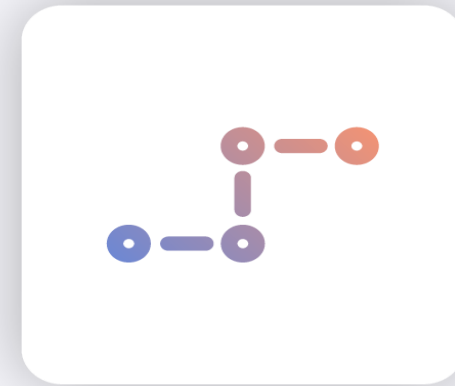
PLATFORM

**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

# contracts<sup>365</sup>

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

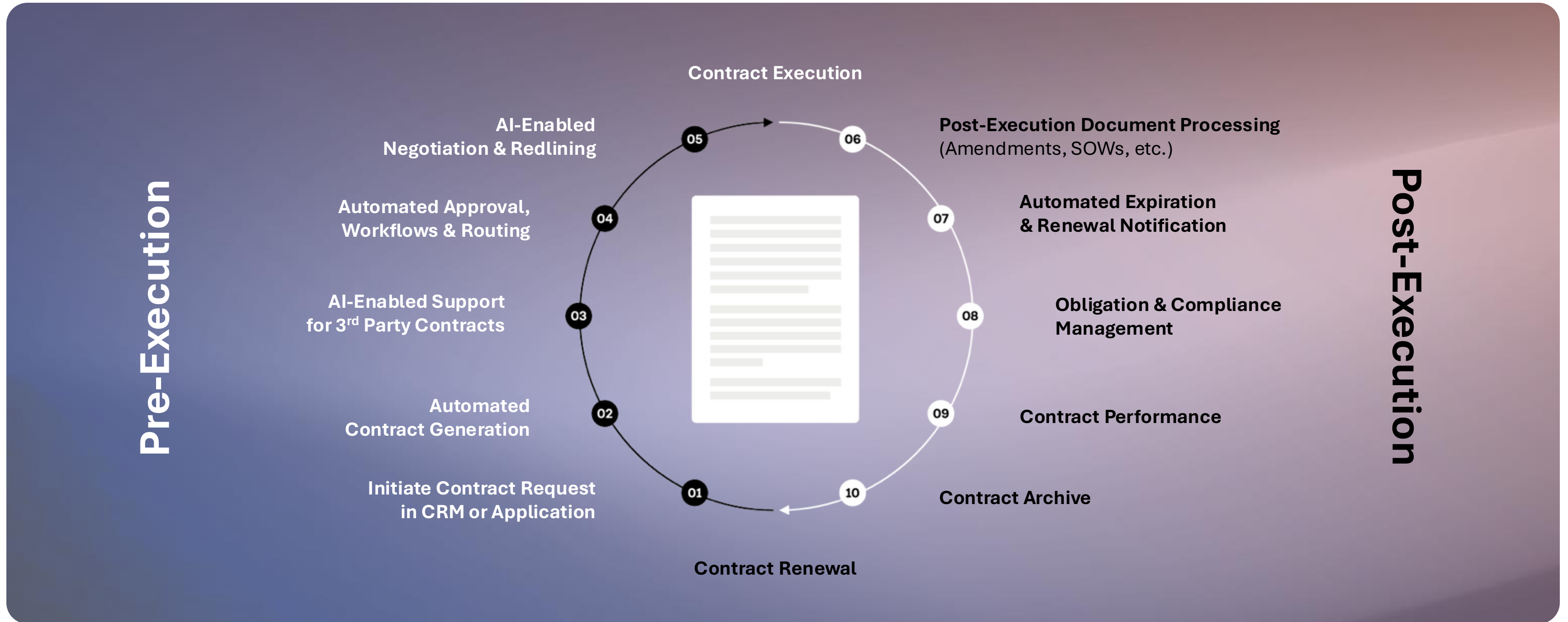


Microsoft  
Defender



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

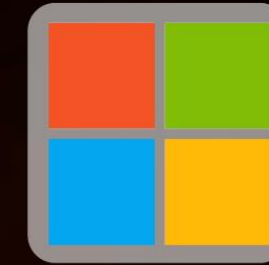


### Corporate

Banking Services Capital  
Investment Agreement Joint  
Venture Agreement

# Our Next Webinar—Reserve Your Spot Today!

contracts<sup>365</sup><sup>®</sup>



WEBINAR

## Why Most Contract Reporting Fails (And What To Measure Instead)

See how meaningful contract reporting helps Microsoft-focused organizations surface risk, track performance, and turn contract data into operational insight.

**Join us live: July 28th • 11:00AM Eastern**

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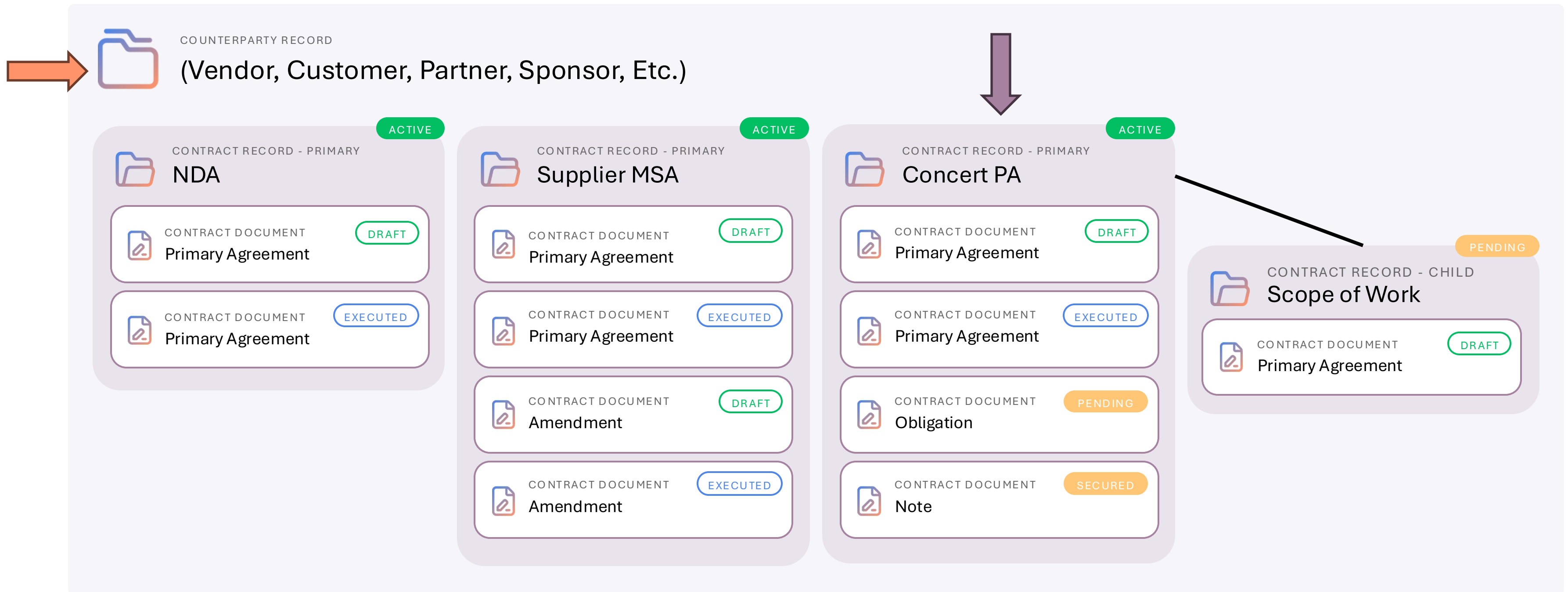
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# Digital contracts have paper roots.

- 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 3<sup>rd</sup> Party Contract
- ✓ Initiate Negotiation



DEMO

## Risk Analyst

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

**Hey, thanks!**

**contracts<sup>365</sup><sup>®</sup>**