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DEEP DIVE

Next-Generation Contract Workflows In Action

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Introductions



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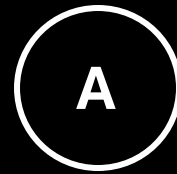
Vice President
Marketing

Deep Dive Demo

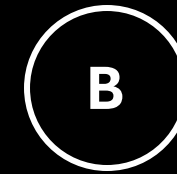


Workflow Reimagined

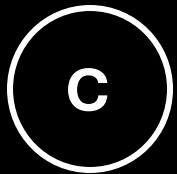
- Concentration Areas



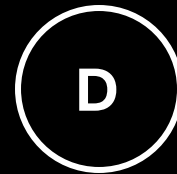
Modern Contract Workspace



No-Touch NDA Workflow



Group Collaboration & Review



Customer MSA

- Multi-Step Process With
Dynamic Changes Initiating In CRM



Workflow Metrics

Modern Workflow | Concentration Areas

One workflow (or a few) can accommodate most contract types

Workflow steps are **visually** represented to support the business processes

Workflows can **easily be restarted** without losing key metrics data

Workflow **administration** is **easily** configured

No-Code “**Packaged**” **integrations** with other systems

Streamlined **workflow sub-tasks** allow for improved work segmentation

Steps in **workflow auto-advance** based upon actions taking place

Insightful metrics and workflow history are readily available to authorized users

Scenario A | Modern Contract Workspace

Three Points

1 Easy-To-Configure Workspace

2 One Page Tells The Story

3 Dynamic Adjustments Are Available Within The Workflow

Demonstration

What did you think?

Scenario B | No-Touch NDA Workflow

Three Points

1 Requestor Submits

2 Correct NDA Is Generated & Sent To Signatories For Internal Templates

3 Once Signed By All Parties, The Executed Contract Is Automatically Returned With Notifications

Demonstration

What did you think?

Scenario C | Group Collaboration & Review

Three Points

1 The “Un-Structured” Workflow – All People Can Collaborate Together

2 Real-Time Discussion Threads With Notifications Are Available

3 Ad-hoc Tasks Can Be Initiated In Simplified Capacity

Demonstration

What did you think?

Scenario D | CMSA - Multi-Step Process & Dynamic Changes

Three Points

- 1 The Contract Workspace Is CRM (Salesforce or Dynamics 365)
- 2 All Data Gets Posted From CRM to Contracts 365
- 3 Workflow Is Initiated Automatically (Emails, Doc Gen, Contract Workspace, Dynamic Salesforce Updates)

Demonstration

What did you think?

Scenario E | Workflow Metrics

Three Points

- 1 Metrics Are Exposed At Contract Level
- 2 Cross-Contract Reporting Is Fully Supported
- 3 Different Workflow “Measures” Can Be Introduced For Specific Segments Of Workflow

Demonstration

What did you think?

Hey, thanks!

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