

The logo for contracts365, featuring the word "contracts" in a white, lowercase, sans-serif font, followed by "365" in a smaller, superscripted font, and a registered trademark symbol (®) to the right. The background of the slide is a dark blue gradient with a bright blue light streak at the bottom.

contracts³⁶⁵®

WEBINAR

Why Most Contract Reporting Fails

(And What To Measure Instead)

July 28, 2025

What We'll Talk About Today

01

**Human
Vital Signs**

02

**Industry Data Points
& Reporting Failures**

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



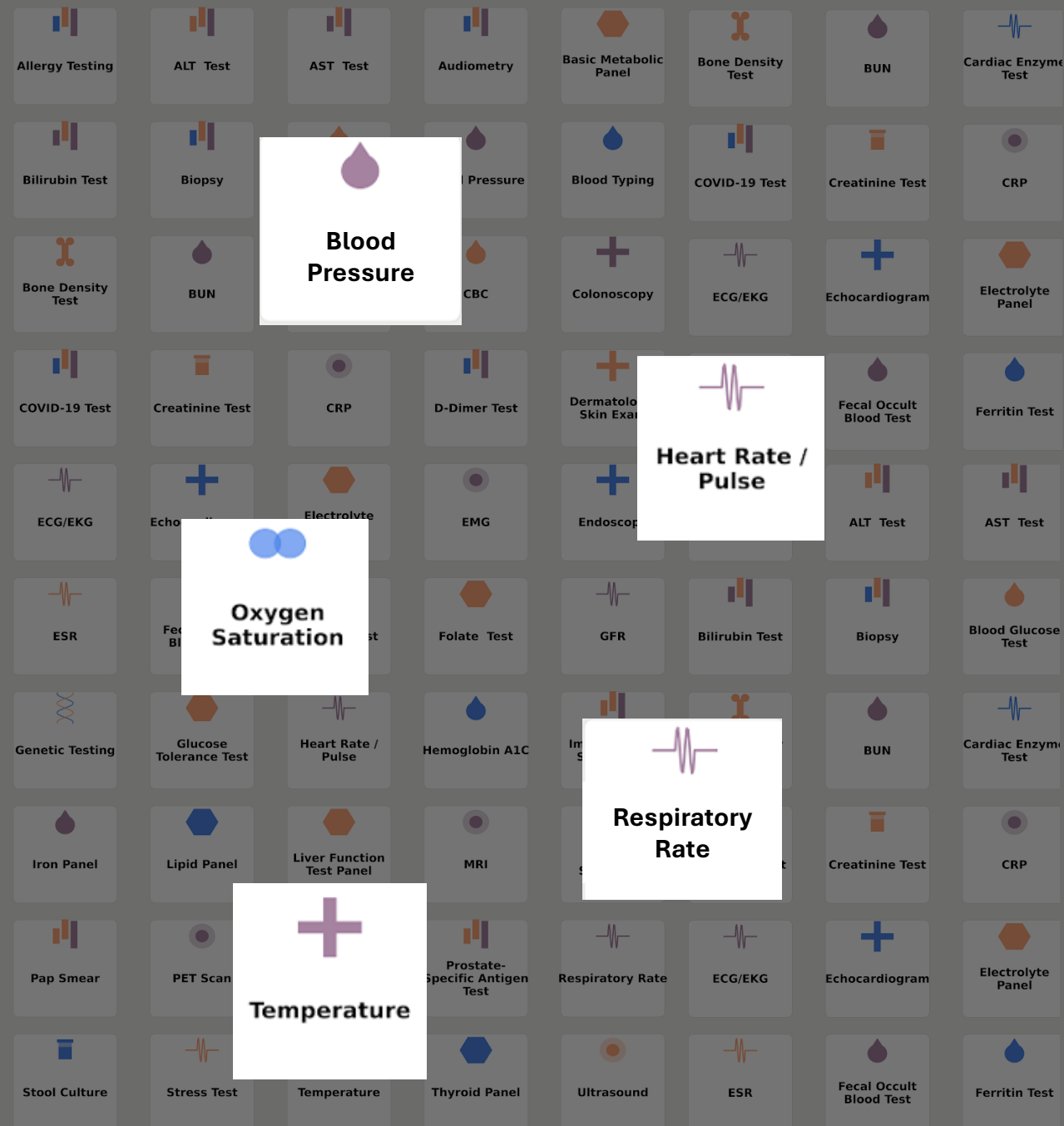
Dave Sandstedt

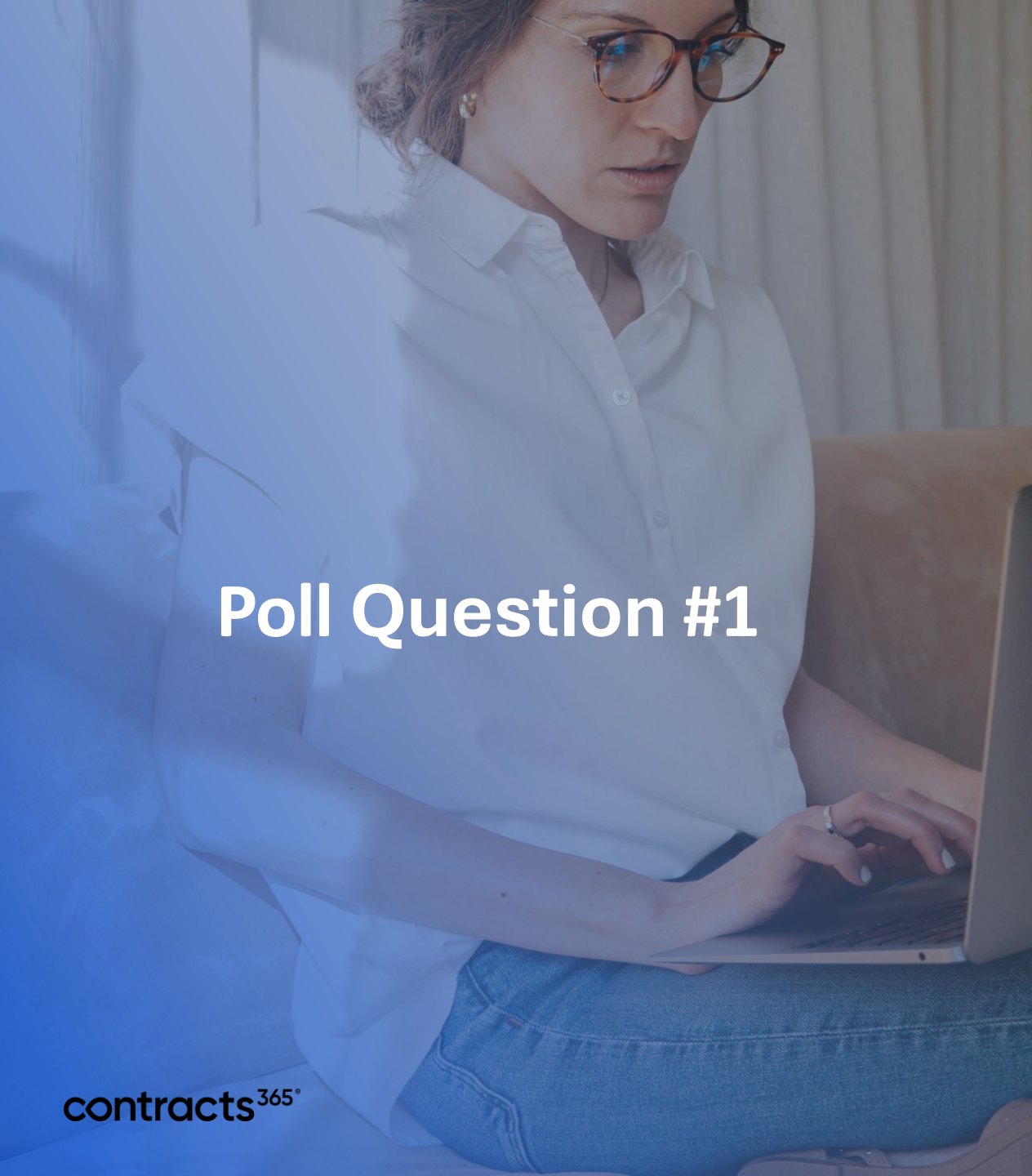
Vice President
Marketing

01

Story 1: Human Vital Signs

Common Human Tests





Poll Question #1

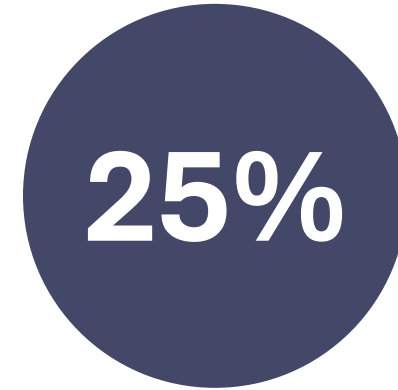
Who cares about contract reports in your organization?

- ✓ Contract Managers
- ✓ Chief Legal Officer/General Counsel
- ✓ Finance Leadership
- ✓ Sales/Procurement Leadership
- ✓ General Users

02

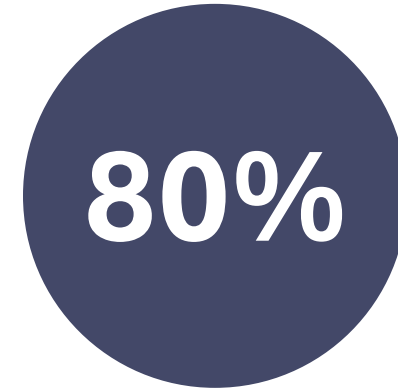
Industry Data Points & Reporting Failures

Industry Data Point

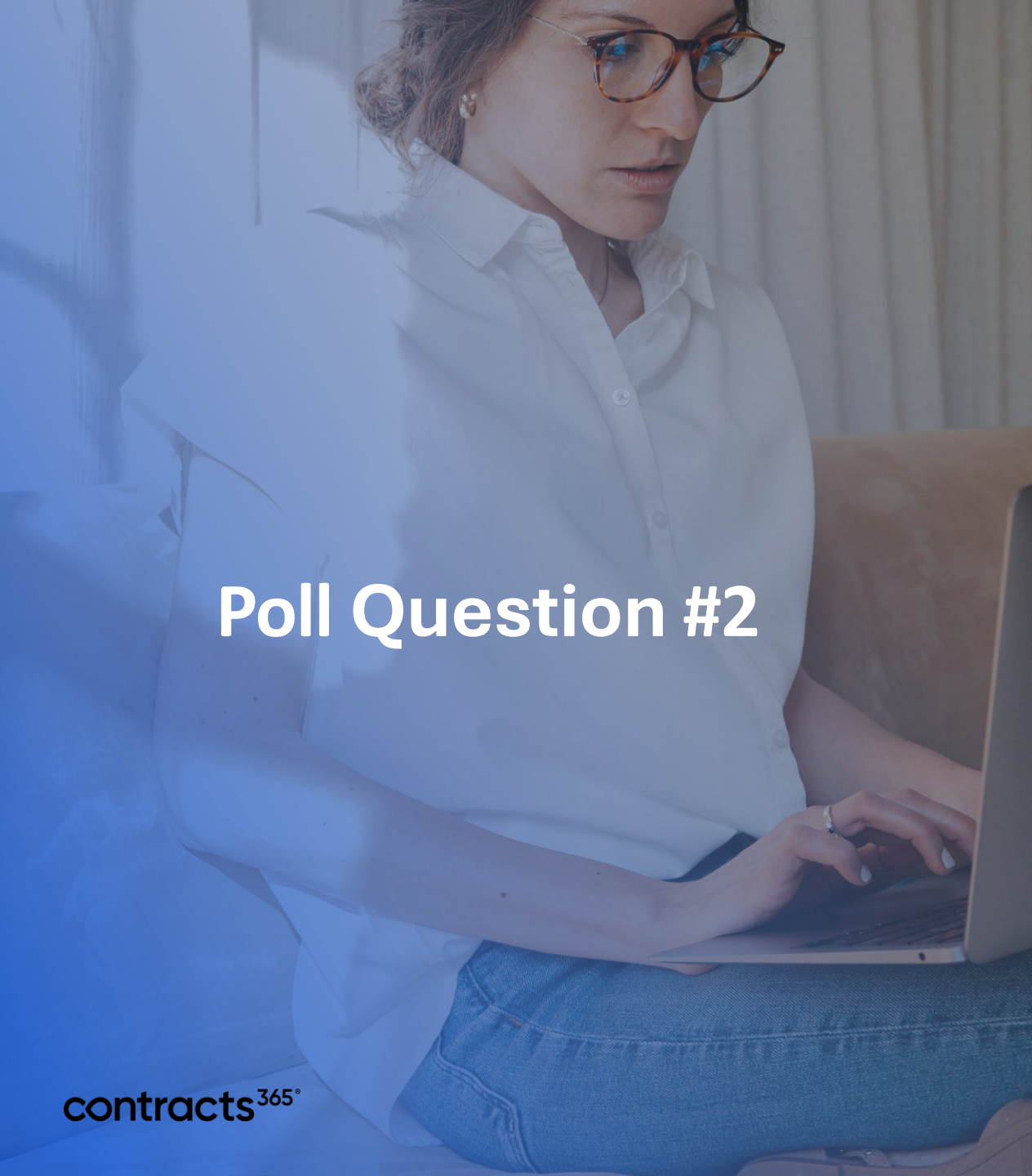


Only 20-30% Of Companies
Have A Genuinely Formal & Consistent
Reporting Process

Industry Data Point



Of Organizations Lack Clear Accountability
for Contracting Performance



Poll Question #2

How Do You Support Contract Reporting?

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

Reporting Failures

Reason	What Reporting Failures Looks Like In Practice	How To Prevent Reporting Failures
Data Integrity	Missing, duplicated or inconsistently defined contract data causes users to distrust the reports.	Establish a data dictionary, required fields, controlled values, data owners and routine quality reviews.
Wrong Questions	Dashboards display contract activity but fail to answer the questions needed to make decisions.	Define each audience, business question, KPI, target, drill-down and resulting action before building reports.
Fragmented Systems	Data spread across CLM, SharePoint, ERP, CRM, spreadsheets & email produces incomplete reporting.	Designate an authoritative source for each data element and integrate systems to eliminate manual re-entry.
User Adoption	Users bypass workflows and fail to update required fields, leaving reports that do not reflect operational reality.	Embed data capture into normal workflows, minimize manual entry (with AI when possible) & “Default Behavior”, train users and monitor data completeness.
Not Actionable	Reports identify problems but do not specify responsible owner, required action, deadline or escalation path.	Define named owners, recommended actions, due dates, escalation rules and a regular review cadence.

03

Contract Vital Signs

Contract Vital Signs | Story 2 : Supplier Risk Report

A Small SaaS Software
Company Produces An
Important Monthly Report

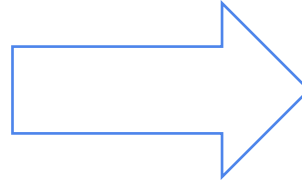
The Report Gets Delivered
To The Board Of One Of Top Ten
Most Valuable Companies

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

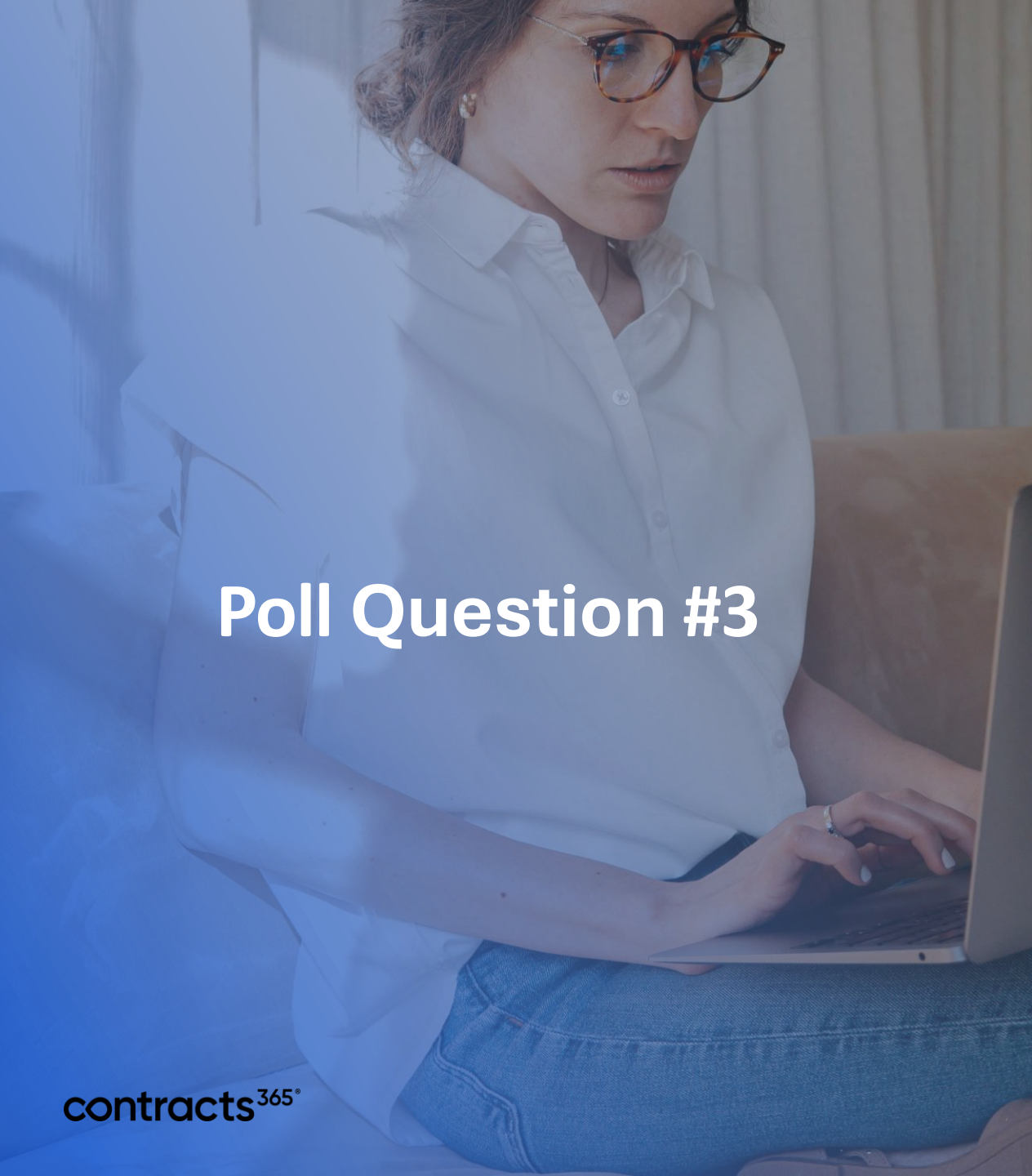
Ummm...Where Are We With

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



Poll Question #3

Where Is Your Contract Data Stored?

- ✓ CLM System
- ✓ Email & Spreadsheets
- ✓ SharePoint
- ✓ ERP System
- ✓ CRM System

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 for 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?

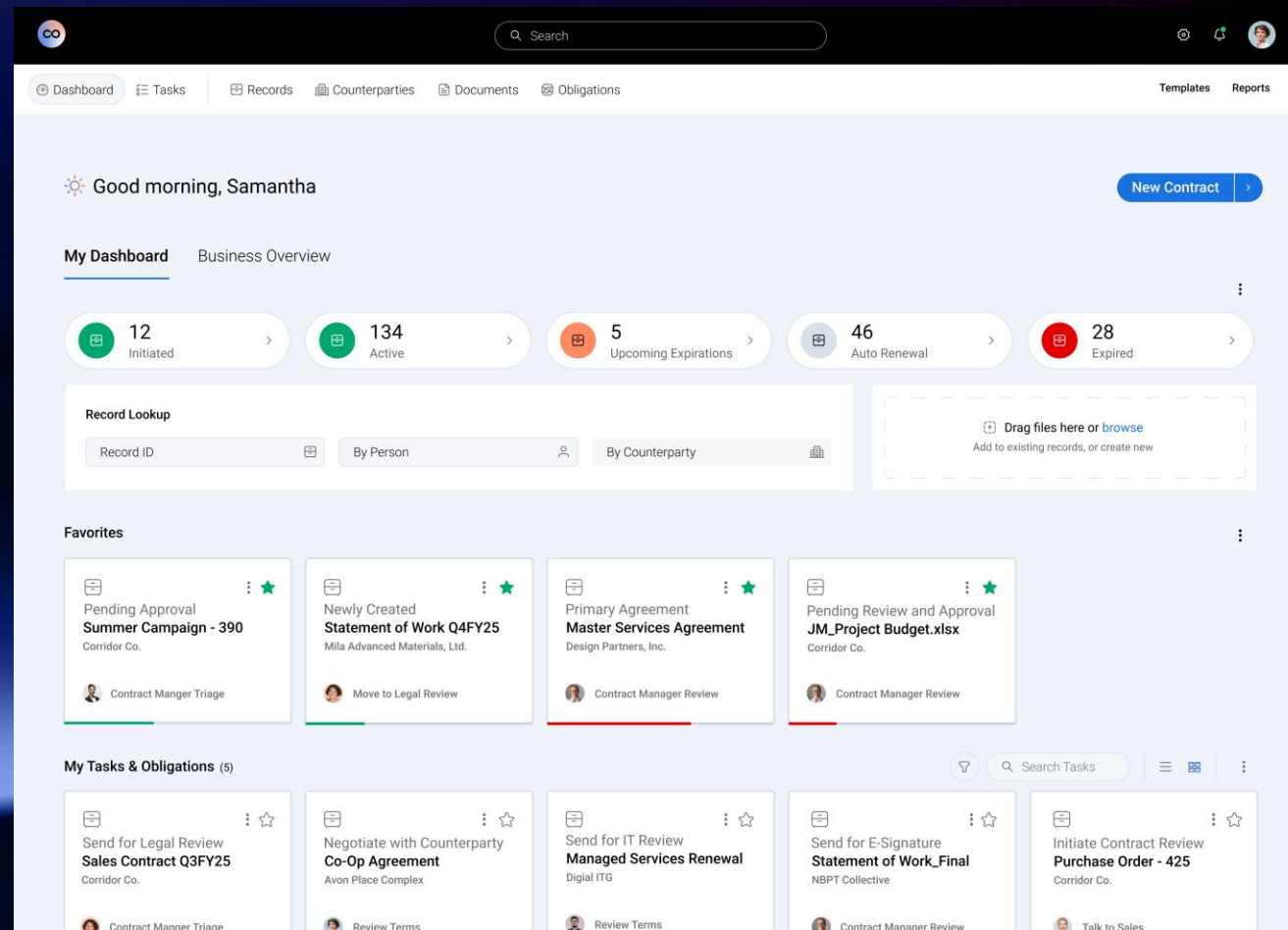
06

Contracts 365

Intro & Demonstration

contracts³⁶⁵[®]

Powerful contract management software for businesses that run Microsoft 365.



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.



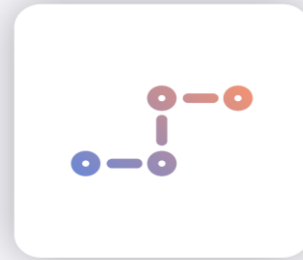
PLATFORM

Microsoft 365®



PEOPLE

User Experience



PROCESS

**Customer
Success Journey**



NO CODE

**Ready-To-Use
Solution**

SAAS-BASED APPLICATION



Contract management and automation for Microsoft 365.

- ✓ AI-powered contract lifecycle management
- ✓ Purpose-built for Microsoft 365
- ✓ Configurable workflows and governance
- ✓ End-to-end contract lifecycle automation



CUSTOMER-CONTROLLED REPOSITORY



Your contracts and contract data in your Microsoft 365 cloud.

- ✓ Retain ownership of your contracts and data
- ✓ Greater security, visibility, control
- ✓ Vetted by your IT & Security leaders
- ✓ Rapid adoption of data governance policies

Contracts 365 operates within your Microsoft 365 environment.
Your contracts and data never leave your Microsoft 365 tenant.

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

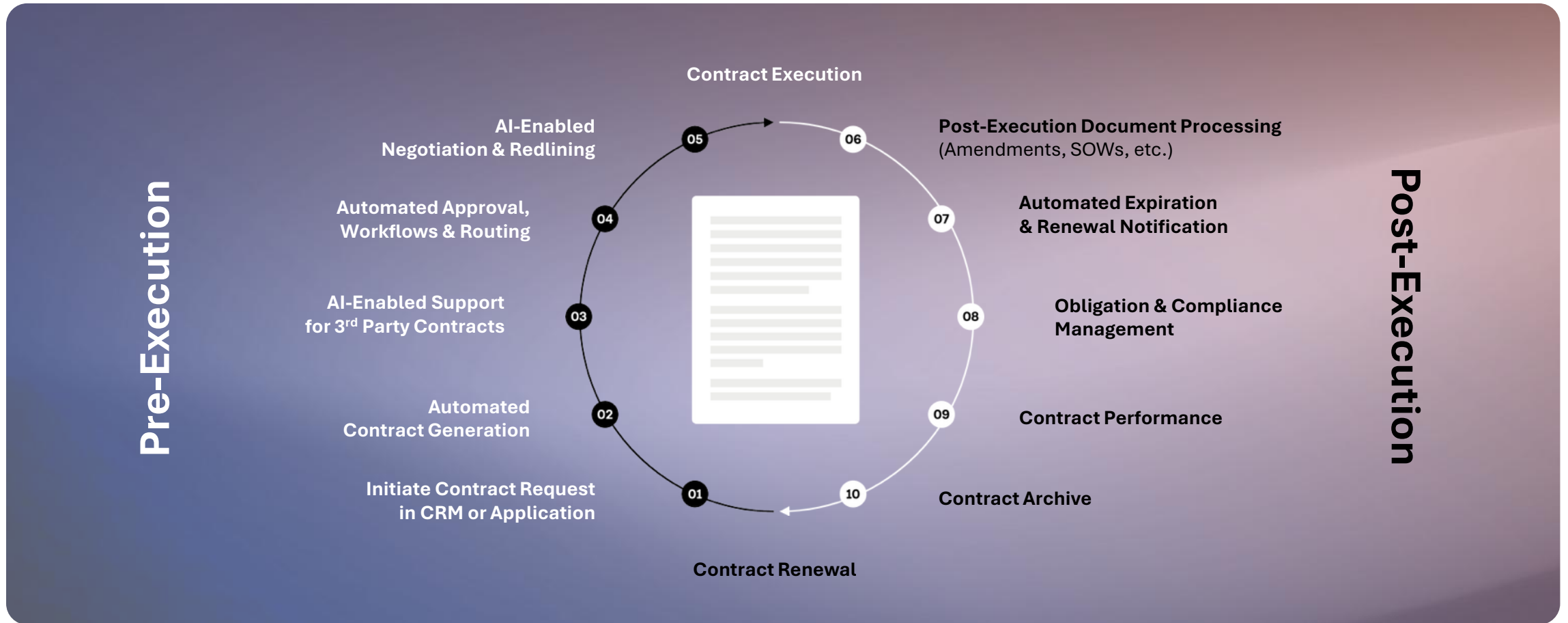


Microsoft
Defender



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

Two-Part Webinar Series: Modern Contract Workflows

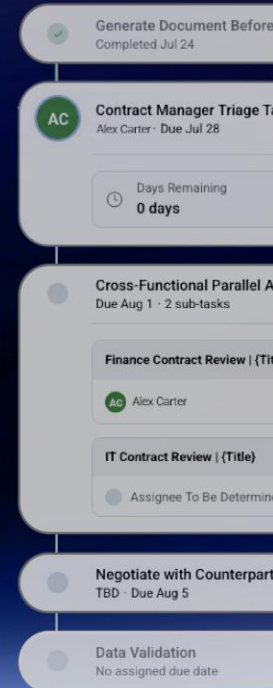
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WEBINAR

Rethinking Contract Workflows: Why Traditional CLM Falls Short

Explore how contract workflows are evolving—and what organizations should expect from a modern contract management platform.

Join us live: September 15th • 11:00AM Eastern



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WEBINAR

Next-Generation Contract Workflows in Action:

A Deep Dive into Contracts 365

See how the contract workspace is being reimagined bringing workflow, tasks, documents, participants, and business context together in a single experience.

Join us live: September 22nd • 11:00AM Eastern

Part I – September 15th

Part II – September 22nd

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How Can We Help?

Questions?

Drop us an email: 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!

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