



Leveraging Microsoft 365 For Contract Management

April 30, 2025

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Introductions



Russ Edelman

Founder &
Chief Product Evangelist



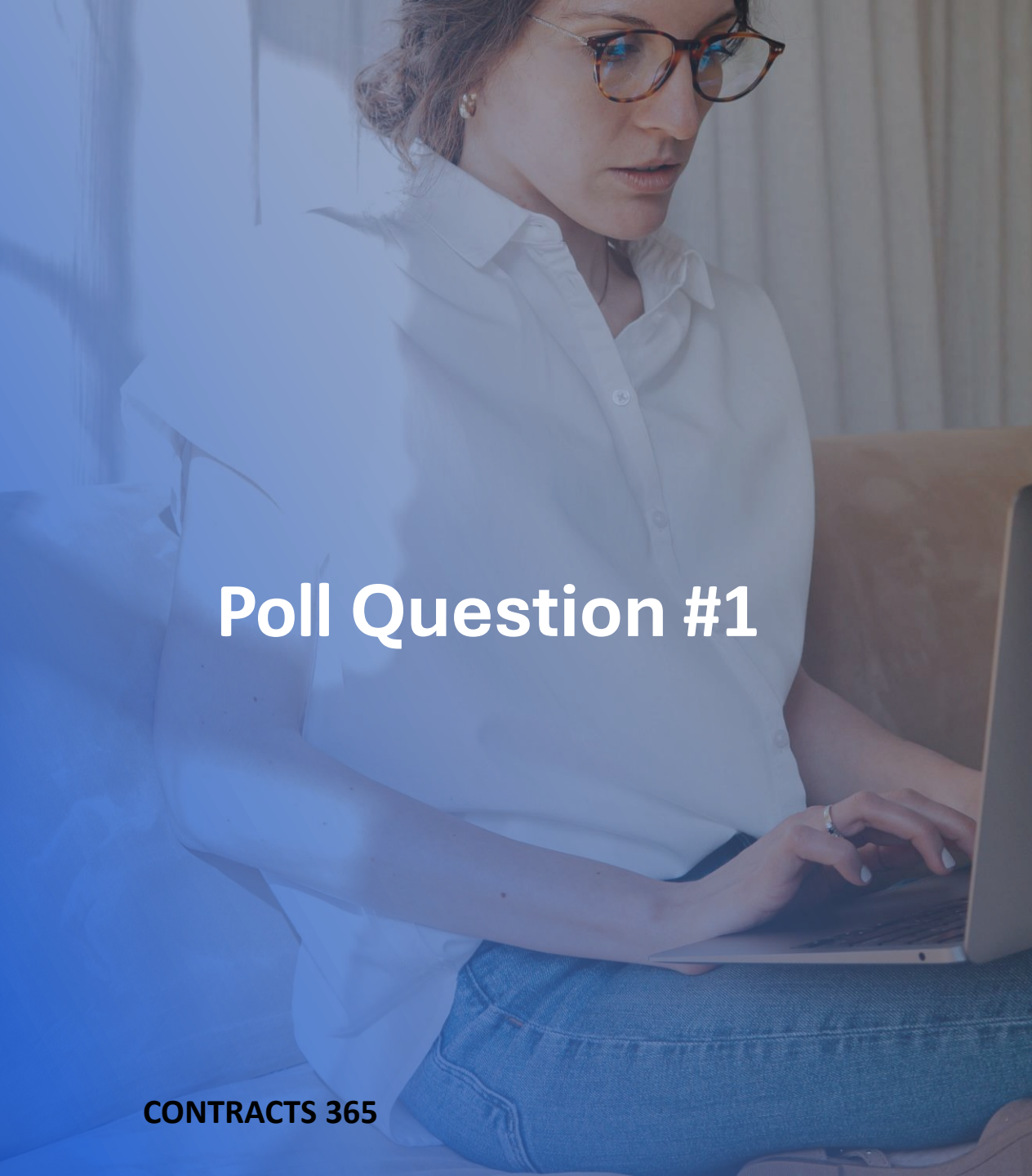
Craig Bertoldi

Vice President
Sales

98% of legal departments in Fortune 500 companies use Word, compared to 75% in other departments.

Source: Gartner Report 2023

contracts³⁶⁵



Poll Question #1

***How are you using Microsoft 365 tools
for contract management today?***

- ✓ Creation of Contracts / Documents
- ✓ Storage of Contracts / Documents
- ✓ Workflow Approvals
- ✓ Reminders for Milestones / Renewals
- ✓ AI for Metadata Extraction



Microsoft Facts

- ✓ Microsoft is the second most valued company in the world with a current market cap of 3.13T USD
- ✓ 90%+ of Fortune 500 firms use Microsoft 365
- ✓ Nearly 70% of the Fortune 500 now use Microsoft 365 Copilot
- ✓ Microsoft 365 has over 345 million paid seats globally, with approx. 39,930 users engaging with the platform every hour
- ✓ 1k+ researchers worldwide focused on AI
- ✓ \$1B+ is Microsoft annual investment in cybersecurity research & development



PLATFORM

Office Productivity & Repository

- ✓ Word is the standard for contract creation & editing (redlining) for contract professionals.
- ✓ Word-Excel-PowerPoint offer concurrent editing in web or desktop versions.
- ✓ SharePoint Online provides a robust repository & metadata structure with security delivered at the enterprise level.
- ✓ Teams delivers collaboration & communication internally & for negotiation.
- ✓ Copilot is a now a reality that people and companies are exploring and using.





PLATFORM

The Microsoft Cloud

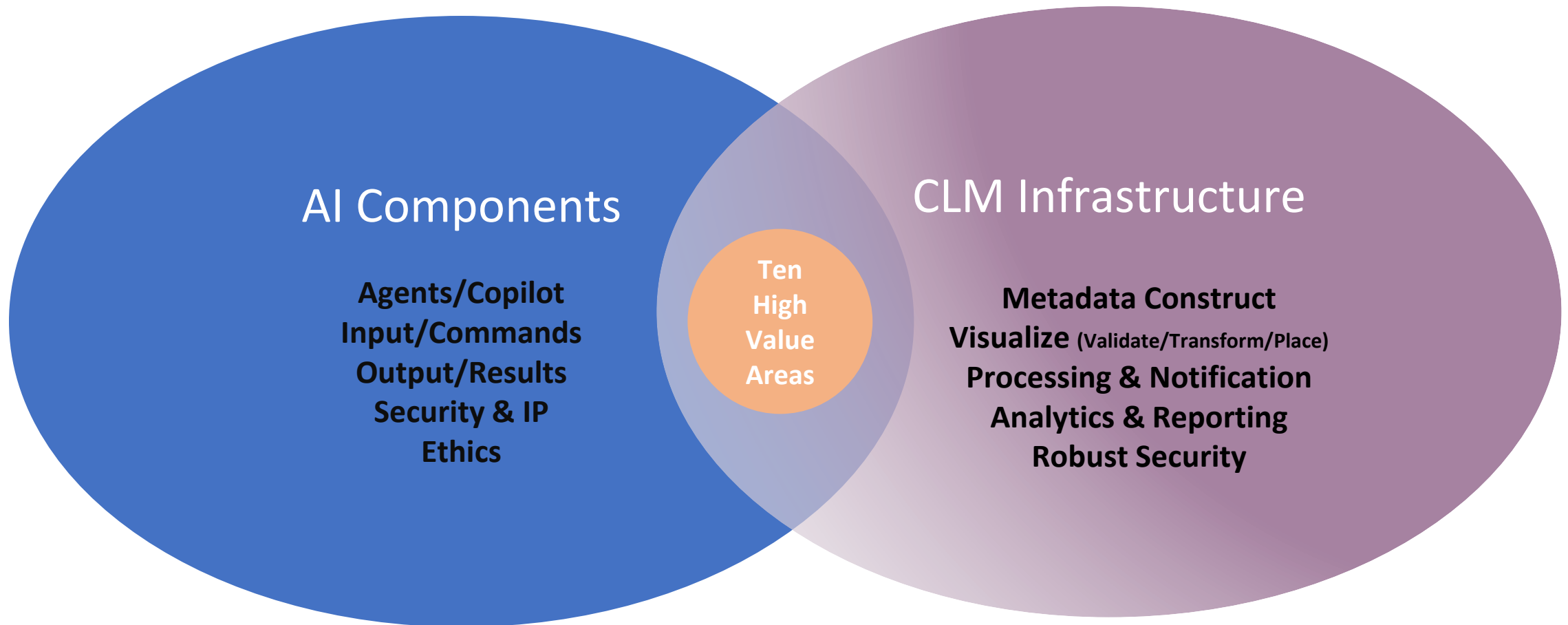
- ✓ Contracts stored in the Microsoft Cloud are stored on your terms, in your geo & with better protections than what usually can be provided on premise.
- ✓ Azure Active Directory (Entra ID) provides a rich security infrastructure with full visibility across the security landscape.
- ✓ Microsoft Information Protection (MIP) secures your contract documents control outside of your network.



AI is 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.

The Intersection of AI & CLM



10 Focus 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

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

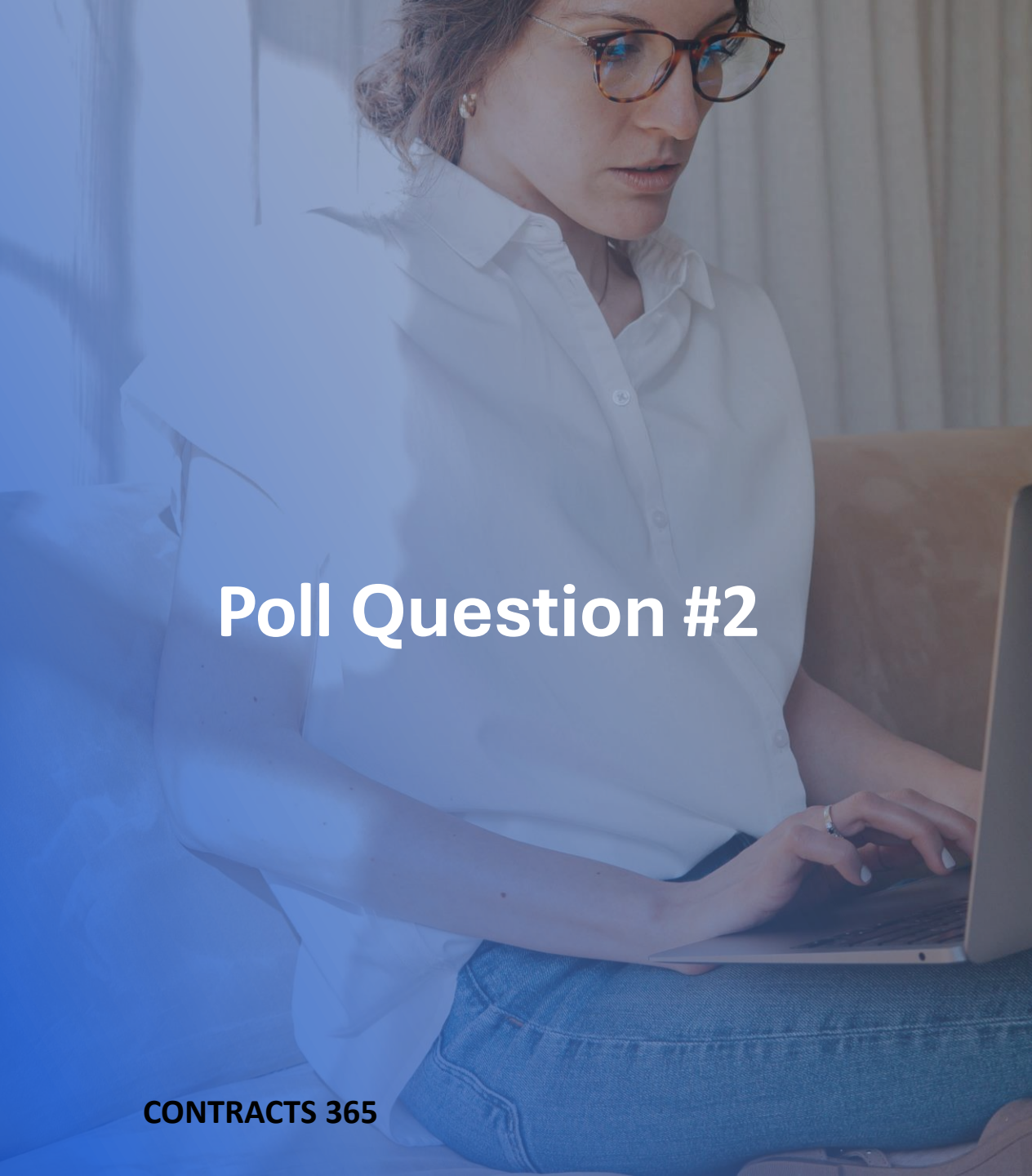
Contract & Clause Generation

“MS Copilot” Generative AI coupled with Appropriate security, IP and ethics protections

10

Correspondence & Negotiations

Generate correspondence and negotiation strategies via memorializing and approvals



Poll Question #2

How are you using AI (or testing) to support contract management?

- ✓ Automated Data Extraction from Contracts
- ✓ Automated Obligation Extraction from Contracts
- ✓ Contract / Clause Summarization
- ✓ Contract / Document & Clause Creation
- ✓ We are not using AI in contracting process

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
- Basic AI For Metadata Extraction via Syntex and basic content comparison
- Microsoft Copilot/Agents For Generative Content
- Expansive API For Development
- Continuous Evolution & Innovation

Enterprise CLM (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/Agents for Contracting Process
- Obligation & Compliance Management
- Proven Integrations With Other Systems (Dynamics, Salesforce, Adobe Sign, DocuSign)
- Dynamic Security models that accommodate complex scenarios

Native Microsoft for Contract Management

Key Building Blocks

LoB Integration



Dynamics 365



Adobe Sign

DocuSign®

LoB Systems

Automation/Reporting/AI

Power Automate

Power BI

SharePoint Syntex

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, Syntex and 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 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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2. Ensure that approvals and other key workflow activities are properly captured for **audit purposes**
3. Consider how **Copilot, Syntex and 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



**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***



**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.***

Powerful contract
management software for
businesses that run
Microsoft 365.

contracts³⁶⁵®

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



OpenAI



Microsoft

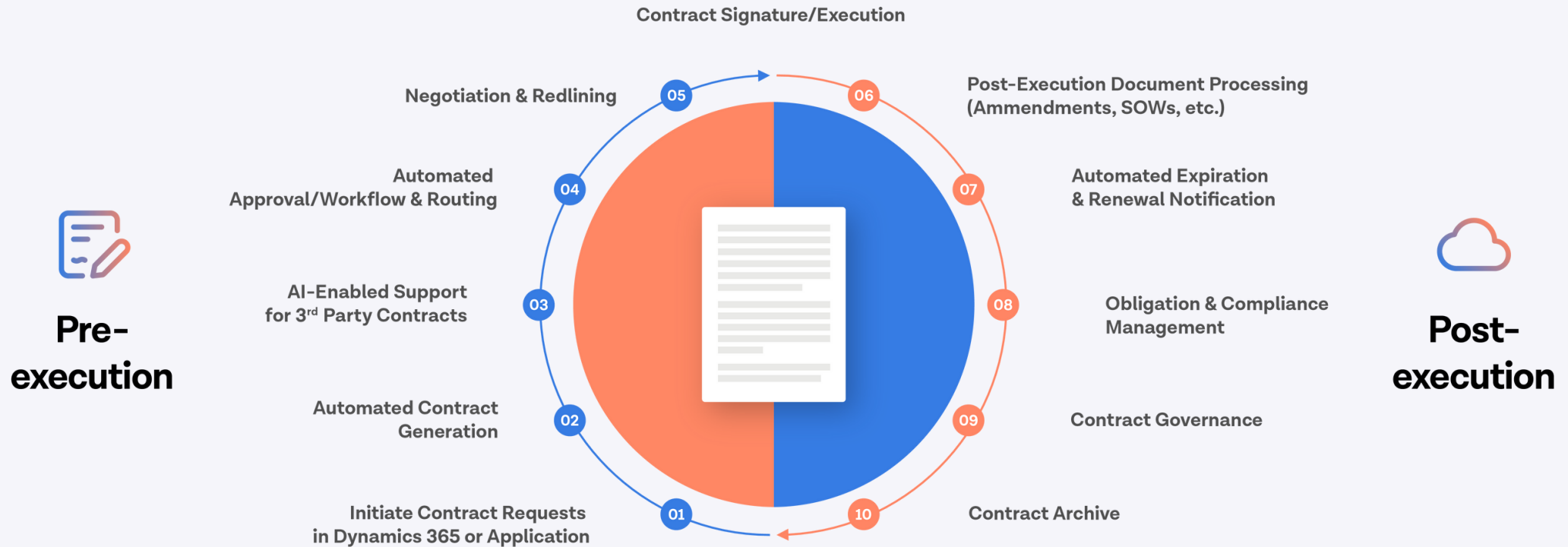


Microsoft
Defender



Microsoft
Sentinel

Delivers greater efficiency for all contract lifecycle activities



Centralized &
Secured Repository

Dynamic
Reporting

Role-Based
Dashboards

Integration With
Other Systems

Our Next Webinar

The Practicalities of AI & Contract Management

**Wednesday May 21, 2025
11AM EST**

How Can We Help?

Questions?

Get in touch: info@contracts365.com

Demonstration



DEMO

Business User

- ✓ Find a contract
- ✓ Submit a contract
- ✓ Check Contract Status



DEMO

Contract Pro

- ✓ Access CM Portal
- ✓ Approve a contract
- ✓ Look at workflow
- ✓ Review workflow metrics

Thank you!

contracts³⁶⁵[®]