



# The Power of Seamless CLM & CRM

Managing contracts more effectively  
within Salesforce & Dynamics 365

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# Introductions



**Russ Edelman**

Founder &  
Chief Product Evangelist



**Dave Sandstedt**

Vice President  
Marketing



# Poll Question #1

**Which CRM platform does  
your organization use?**

- ☒ Salesforce
- ☒ Microsoft Dynamics 365
- ☒ Other
- ☒ None

# CRM Industry Datapoints

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**\$98B**

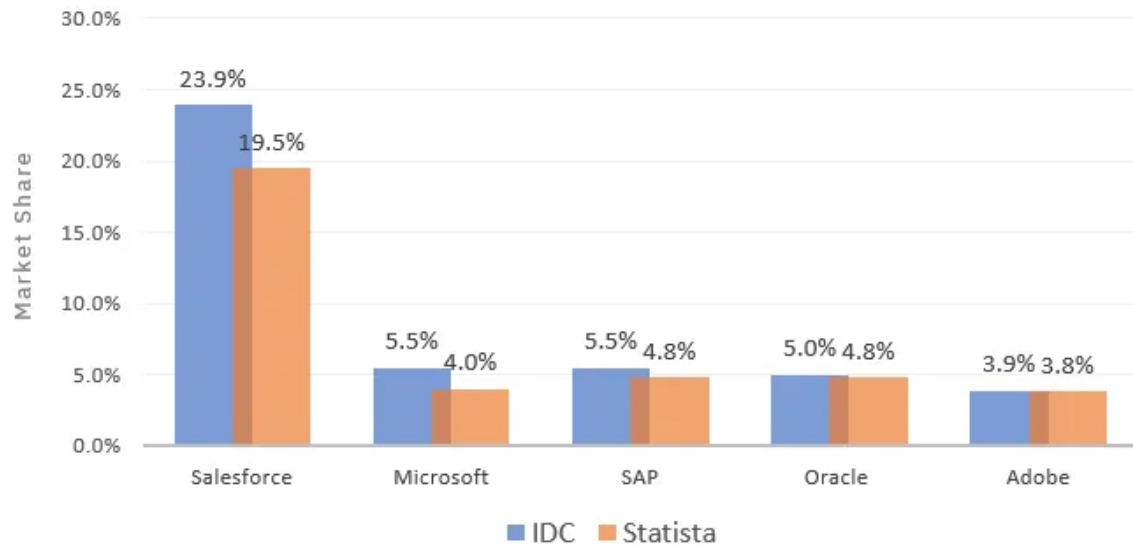
In 2025, the CRM market is expected to reach **\$98 billion**.

The background of the slide features a collection of 3D software icons in various colors (blue, purple, orange, green) arranged on a light-colored surface. The icons include a hand cursor, a document with a 'T', a document with a 'P', a document with an 'X', and a cloud icon. A white rounded square is centered on the left side of the slide, containing the text '91%'.

**91%**

**CX & CRM industry analysts report that **70% of businesses** rely on CRM software. The number rises to **91%** for businesses with **11+ employees**.**

CRM Market Share



**Salesforce** continues to dominate the market, serving a large number of customers, including a significant portion of Fortune 500 companies.

**Microsoft Dynamics** is becoming a major competitor with a considerable portion of the market share alongside SAP, Oracle, and Adobe.





The Microsoft Dynamics market is expected to grow from **\$10.2B** in 2024 to **\$11.42B** in 2025, a 12.0% year-over-year increase. The market is projected to reach **\$17.79B** by 2029, reflecting a steady CAGR of 11.7%.



# Poll Question #2

**Which benefit of CRM is most important to your organization regarding CLM?**

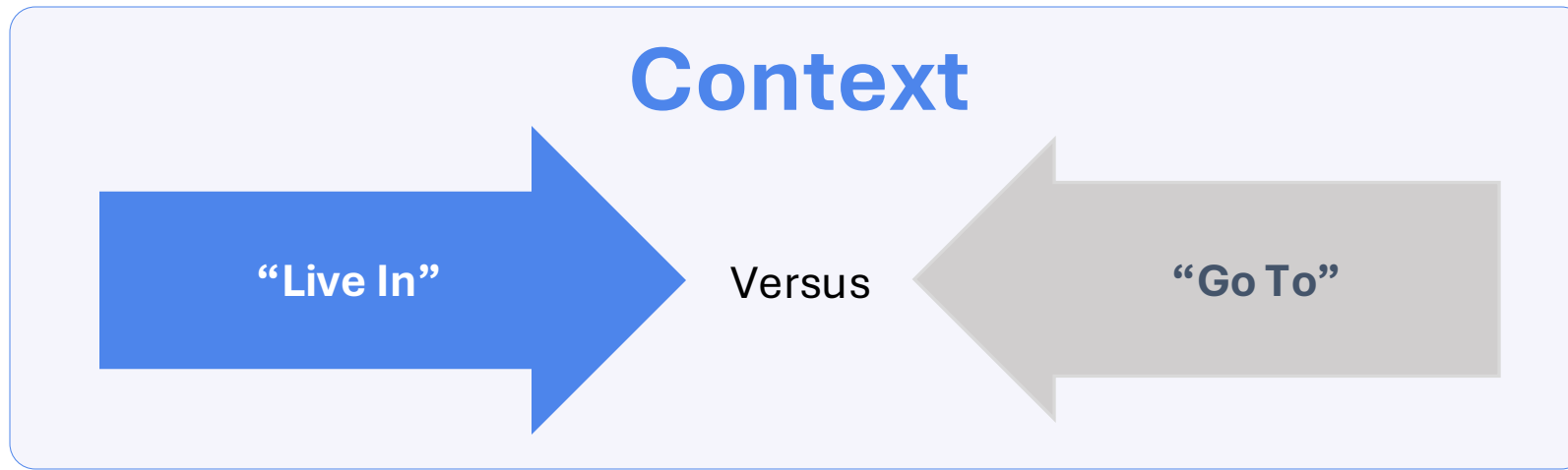
- ✓ Optimized sales cycles
- ✓ Efficient contract creation and management
- ✓ Enhanced visibility
- ✓ Improved contract compliance
- ✓ Cost savings

# Five Primary Use Cases For Integration


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# The “Live-In” Benefit of Great Integration

- Integration between disparate yet complimentary systems often introduces complexities to deliver meaningful functionality
- When integrating a CRM system with a Contract Lifecycle Management (CLM) system, the contextual setting that must be understood is: “Where do users ‘live’?”
- Microsoft’s mantra for Dynamics 365 is “Staying In The Flow Of Work” — which is consistent with Salesforce and other CRM systems when it comes to optimal user experiences.



# The Primary **Business Functions** (and Benefits) of CLM & CRM Integration



Initiate  
Contract  
Within CRM

Show Linked  
Contracts  
Within CRM

Single Sign  
On &  
Integrated  
Security

Create  
Supporting  
Docs Within  
CRM

Update CRM  
Based Upon  
CLM Activity

# Varied Perspectives & Why They Matter

## Salespeople

### What they need:

- Accelerate sales cycles by removing delays and administrative burdens.

### Why Integration matters:

- Contracts move seamlessly from CRM to CLM, reducing back-and-forth and helping close deals faster.

## Sales Ops / Management

### What they need:

- Visibility into the entire sales-to-contract process to track performance and forecast accurately.

### Why Integration matters:

- Eliminate duplicate data entry, reduce errors, and provide better pipeline-to-contract analytics.

## Contract Professionals

### What they need:

- Access to accurate deal data from Sales to draft, review, and finalize contracts efficiently.

### Why Integration matters:

- Ensures the right data flows automatically from CRM, reducing rework and keeping contracts compliant and consistent.

## IT / Compliance

### What they need:

- Secure, proven integrations between enterprise systems that meet compliance and governance standards.

### Why Integration matters:

- Creates a standardized, predictable environment for managing and protecting data, reducing risk and IT overhead.

# The Primary **Business Functions** (and Benefits) of CLM & CRM Integration

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## Initiate Contract Within CRM

### Where to Initiate

- Most organizations use the “standard” Tables/Data Entities or Objects (Account, Opportunity, etc.).
- Dynamics 365 Sales and Salesforce provides ability to create Custom Tables/Objects which may be appropriate for initiation purposes.

### How to Initiate

- Initiating the Request should never be more than one click away for anyone using the CRM system.
- Once initiated, the experience should be very seamless with an immediate return to their starting point once completed.

### CLM Data Requirements

- The creation of a contract is often dependent upon key data from the CRM system: Contract Amount, Customer, PO # and other information collected in the sales cycle.
- This information needs to be easily and transparently posted from the CRM system to the CLM system when initiating requests.





## Initiate Contract Within CRM

### Pros

- Streamline/Accelerate Contract Creation
- Minimize Data Entry Errors
- Constrain Contract Information Based Upon Data Coming From Dynamics 365 Sales

### Cons

- Requires thought and effort to identify where to initiate a contract record
- Requires thought and effort to identify which data fields need to post from CRM to CLM

## Where to Initiate

- Dynamics 365 Sales and Salesforce are built upon a large number of Tables/Objects; identify which contracts show for each Table/Object.
- When a contract is created at the Opportunity level, should it display at the Account level or at some Custom Object that was created within your organization?

## How to Initiate

- Most CLM systems will have a large collection of data fields available for display within either CRM system.
- e.g. Fields can vary based upon the Data Entity displaying the Linked Contracts. (Additional consideration must be given to if the Contract Records and/or Contract Documents are displayed.)

## Actions to be Taken

- With Contracts now available within the system, what should the Sales team members be able to do?
- e.g. Should they be able to access more information, initiate a negotiation, open the actual documents, participate in a workflow process or take some other type of action?





### Pros

- The right information should be able to be displayed in the right context of the Data Entity
- CRM users should be able to take actions that are meaningful and produce results

### Cons

- Requires thought and effort to identify which Tables/Objects will have links to contract records and/or documents and then perform the appropriate configuration work to address the requirements

**Show Linked  
Contracts Within  
CRM**



## Single Sign On & Integrated Security

### SSO Support

- Well-designed integrations must take SSO into account as the burden of having users log into multiple systems is substantial.
- “Identity Providers” should be consolidated for authentication, password policy management and related security implications

### Integrated Permission Access

- The importance of having a consolidated and integrated permission/security model is also a powerful factor for well-designed integrations.
- Ideally, there should be a mechanism that allows for corporate security groups in one Identity Provider to be leveraged across both the CLM and CRM systems.



## Single Sign On & Integrated Security

### Pros

- Integrated SSO and Security will simplify and de-risk highly complex security structures
- Users will not have to remember multiple login credentials and password management is consolidated
- Security/permissions are unified for ease of administration

### Cons

- If the CLM product is not built on a standard platform, SSO & Security integration may be more challenging
- Coordination with security teams is demanding and requires a substantial investment in time when using non-industry standard platforms

Understanding Parent-Child Document Relationships



Account/Counterparty  
**MedLand, Inc.**



Contract Record  
**MedLand NDA**



Contract Document  
**MedLand NDA-Draft.docx**



Contract Document  
**MedLand NDA-Signed.docx**



Contract Record  
**MedLand MSA**



Contract Document  
**MedLand MSA-Draft.docx**



Contract Document  
**MedLand SOW1-Draft.docx**



Create  
 Supporting Docs  
 Within CRM



## Contract Record Selection

- Support is needed to select which Contract Record will be the “parent” of the new Supporting Document.

## Data Inheritance From Contract Record

- Configurability is needed to inherit data from the Contract Record and use for generating a new Supporting document.

## Contract Document Specific Data

- Data specific to the Supporting document should be available within Dynamics 365 Sales for auto-populating into the CLM.





### Pros

- Allows the right child/supporting documents to be associated with the correct parent contract records
- Minimizes or eliminates data entry errors

### Cons

- Requires thought and effort to identify how information will flow from parent to child and where users should be allowed to create supporting documents

**Create  
Supporting Docs  
Within CRM**





## Update CRM Based Upon CLM Activity

### Data Transfers

- Automatically transfer data from the CLM system to the CRM system based upon a pre-defined data mapping process.

### Event-Driven Process

- Allow for flexibility when defining what event would initiate the writing of data from the CLM system to CRM. For example, when a contract has been executed, the CRM Opportunity Status may get updated.

### Data, Documents, or Both

- Depending upon how information is to be inserted into the CRM system, there may be a need to post only data (e.g. status example above) or populate a CRM link field with a link back to Contract (and/or documents) in the CLM system. Also note that none of these are mutually exclusive.



## Update CRM Based Upon CLM Activity

### Pros

- Allows for data to be automatically transferred without manual intervention; providing heightened efficiencies
- Reduces or eliminates data entry errors
- If there is a need to have documents reside in one or both systems, this can be accomplished

### Cons

- Requires thought and effort to identify and configure how information will flow from CLM system to the CRM system



## New Counterparty Creation

- When initiating a contract from within CRM, it is important to have the ability to dynamically create the related counterparty (or not).

## CLM Initiates New CRM Opps

- The CLM system should have the ability to dynamically create full CRM Opportunities based upon events (e.g. upcoming renewal date).

## Related Deal Data

- CRM by default has related Tables/Objects (e.g. Product or Service) for the Opportunity. If these related Tables/Objects are in use, you may need to populate comparable structures in the CLM.

## Extended Data Support

- Support for standard Tables/Objects within CRM is critical
- There is a growing trend to build out other Tables/Objects to support Sales-related functions, which are very important as well.





### Pros

- These items may not come up during demonstrations; however, they are very important for a complete solution.

### Cons

- In the absence of supporting these functions, additional manual steps may need to be taken.

**New Counterparty Creation**  
**CLM Initiates New CRM Opps**  
**Related Deal Data**  
**Extended Data Support**

# What About ERP Systems?

1

## Master Data Validation

“System of Record” data (e.g., counterparties, products) are copied from LoB system to Contracts 365 to eliminate/reduce redundant data.

2

## Content Posting

Once a contract has reached a designated status (e.g., Active), data can be copied/pushed automatically from Contracts 365 to LoB.

3

## Contract Enabling LoB Systems

Allow for Contracts 365 to be accessed within the LoB system for simplified access.

4

## Transaction Data Support

“System of Record” data (e.g., counterparties, products) are copied from LoB system to Contracts 365 to eliminate/reduce redundant data.

5

## Initiate C365 Request From LoB System

Initiate a C365 request for a contract or other key data entity from a LoB system which posts LoB data directly to Contracts 365 with a link back.



# Poll Question #3

**Describe the level of customization applied to your CRM instance.**

- ✓ Standard, close to “out of the box”
- ✓ Lightly customized
- ✓ Moderately customized
- ✓ Heavily customized
- ✓ I don’t know

# Real-World ROI Metrics

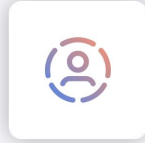
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# Customer ROI Metrics



## Three Activities

- Submit Request From D365
- Find Contract
- Check Status



## People

- 1 Attorney
- 1 Contract Manager
- 17 Salespeople
- 7 Senior Leadership
- 10 Business Users



## Economics

- Pre-Automation: \$1.2M
- Post-Automation: \$169k



# Customer ROI Metrics

| Process Assessment   <a href="#">Find A Contract</a>    |           |                       |                |                |                |                 |                |
|---|-----------|-----------------------|----------------|----------------|----------------|-----------------|----------------|
| Activity/Task   | Count Per | Role                  | Number Of      | Pre Automation |                | Post Automation |                |
|   | Year      |                       | People In Role | Minutes/Unit   | Estimated Cost | Minutes/Unit    | Estimated Cost |
| Attorney - Searches For & Finds Contract                | 45        | Attorney              | 1              | 4.00           | \$13,522       | 0.50            | \$1,690.20     |
| Contract Professional - Searches For & Finds Contract   | 220       | Contract Professional | 1              | 4.00           | \$58,173       | 0.50            | \$7,271.63     |
| Sales Person - Searches For & Finds Contract            | 90        | Sales Person          | 17             | 6.00           | \$376,005      | 0.50            | \$31,333.74    |
| Senior Leadership - Searches For & Finds Contract       | 20        | Senior Leadership     | 7              | 6.00           | \$75,721       | 0.50            | \$6,310.10     |
| Business User - Searches For & Finds Contract           | 135       | Business User         | 10             | 6.00           | \$287,297      | 0.50            | \$23,941.41    |
| Process Assessment   Find A Contract   Estimated Totals |           |                       |                |                | \$810,718      |                 | \$70,547       |

| Process Assessment   <a href="#">Check Status Of Contract</a>    |           |                   |                |                |                |                 |                |
|--|-----------|-------------------|----------------|----------------|----------------|-----------------|----------------|
| Activity/Task  | Count Per | Role              | Number Of      | Pre Automation |                | Post Automation |                |
|  | Year      |                   | People In Role | Minutes/Unit   | Estimated Cost | Minutes/Unit    | Estimated Cost |
| Sales Person - Check Status Of Contract                          | 225       | Sales Person      | 17             | 2.00           | \$313,337      | 0.50            | \$78,334.34    |
| Senior Leadership - Check Status Of Contract                     | 20        | Senior Leadership | 7              | 2.00           | \$25,240       | 0.50            | \$6,310.10     |
| Business User - Check Status Of Contract                         | 30        | Business User     | 10             | 2.00           | \$21,281       | 0.50            | \$5,320.31     |
| Process Assessment   Check Status Of Contract   Estimated Totals |           |                   |                |                | \$359,859      |                 | \$89,965       |

| Process Assessment   <a href="#">Contract Request Submission</a>    |           |              |                |                |                |                 |                |
|---|-----------|--------------|----------------|----------------|----------------|-----------------|----------------|
| Activity/Task   | Count Per | Role         | Number Of      | Pre Automation |                | Post Automation |                |
|   | Year      |              | People In Role | Minutes/Unit   | Estimated Cost | Minutes/Unit    | Estimated Cost |
| Sales Person - Contract Request Submission                          | 13        | Sales Person | 17             | 5.00           | \$46,079       | 1.00            | \$9,215.81     |
| Process Assessment   Contract Request Submission   Estimated Totals |           |              |                |                | \$46,079       |                 | \$9,216        |

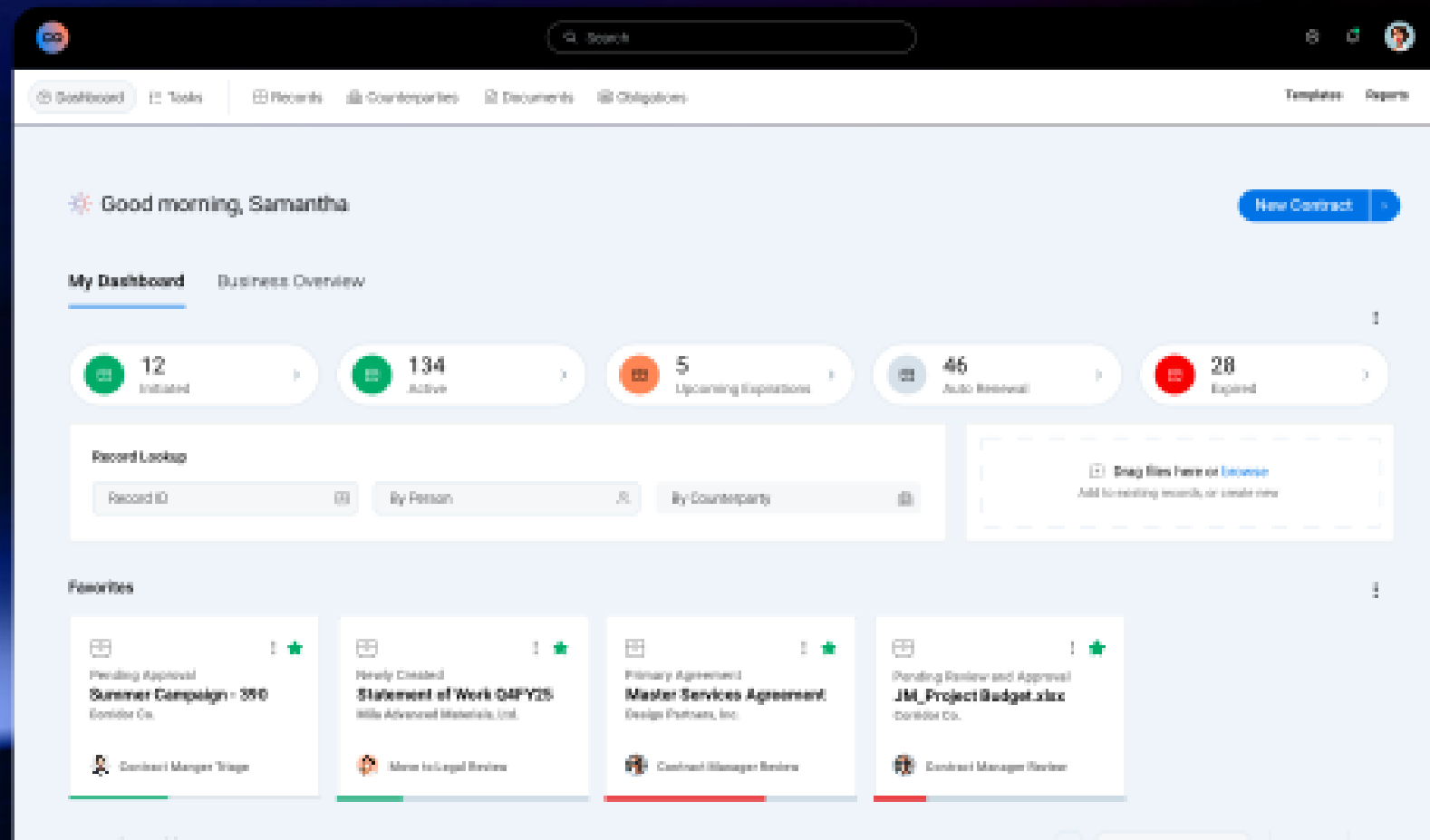
**Intro & Demo**

# **Contracts 365 and CRM Integration**

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# contracts<sup>365</sup><sup>®</sup>

Powerful contract management software  
for businesses that run Microsoft 365.



After 20 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.



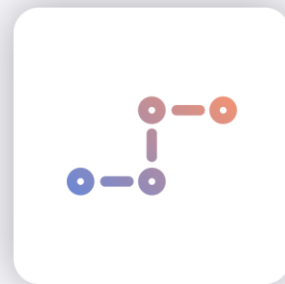
PLATFORM

**Microsoft 365®**



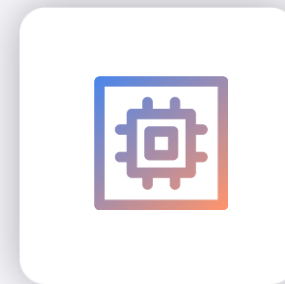
PEOPLE

**User  
Experience**



PROCESS

**Customer  
Success  
Journey**



NO CODE

**Ready-To-Use  
Solution**

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



#### 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 & Security leaders
- ✓ Rapid adoption of data governance & retention policies

# contracts<sup>365</sup>

**Works in all Microsoft cloud environments**



**Leverages apps people use every day**



**Key integrations make contract workflow easier**

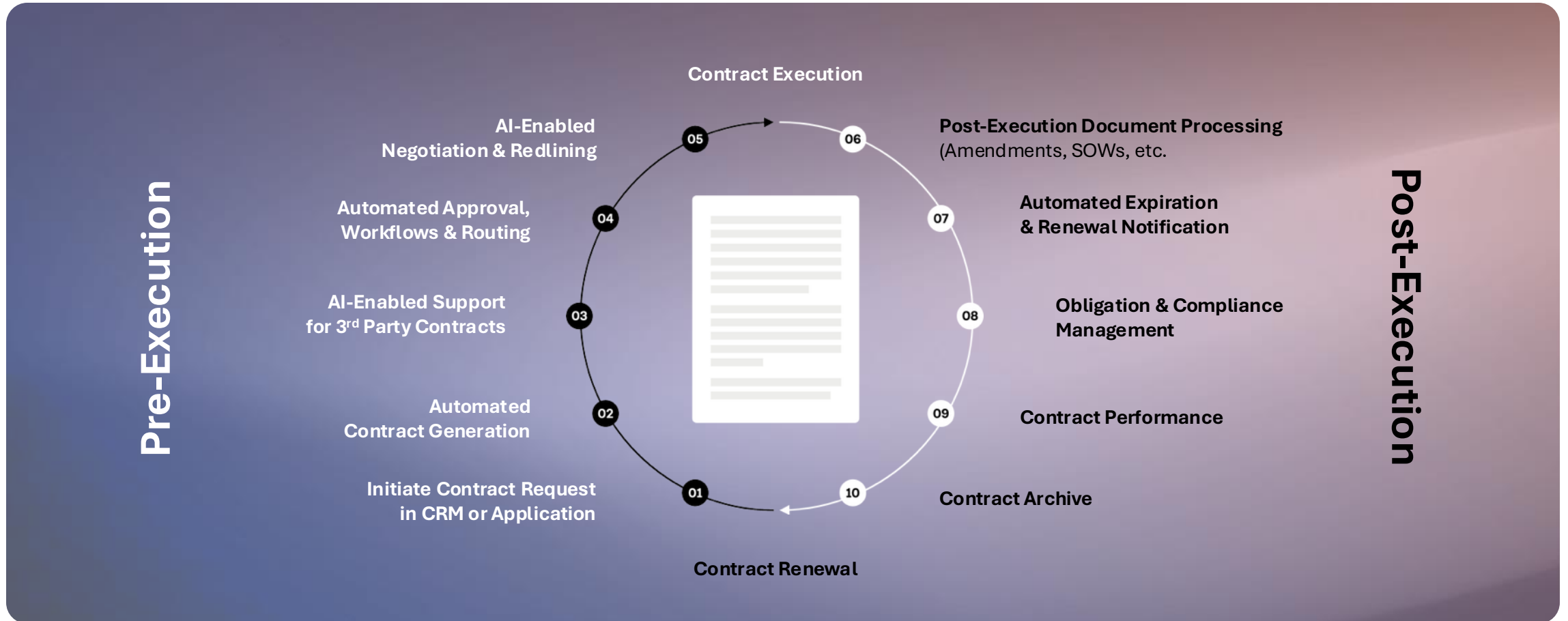


**Advanced AI, data and security services**



# contracts<sup>365</sup>

# Delivers greater efficiency for all contract lifecycle activities



Centralized &  
Secured Repository

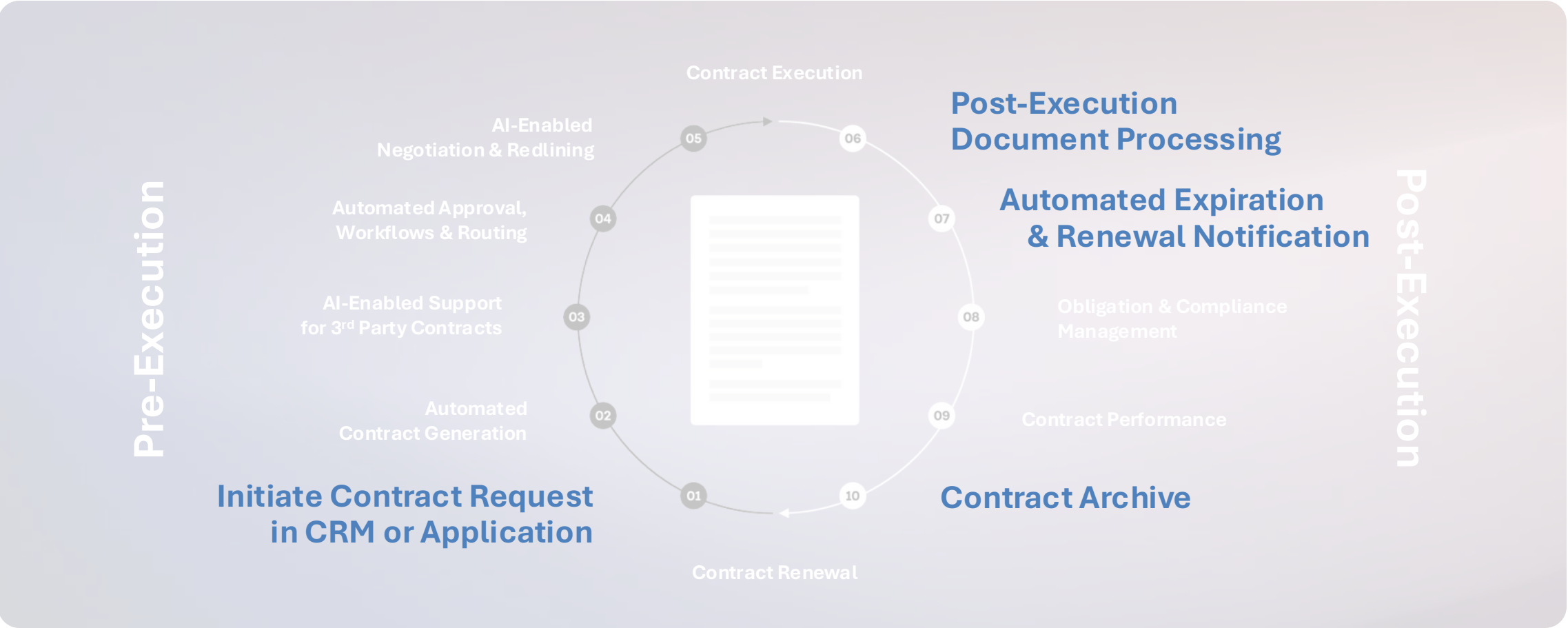
Dynamic  
Reporting

Role-Based  
Dashboards

Integration With  
Other Systems

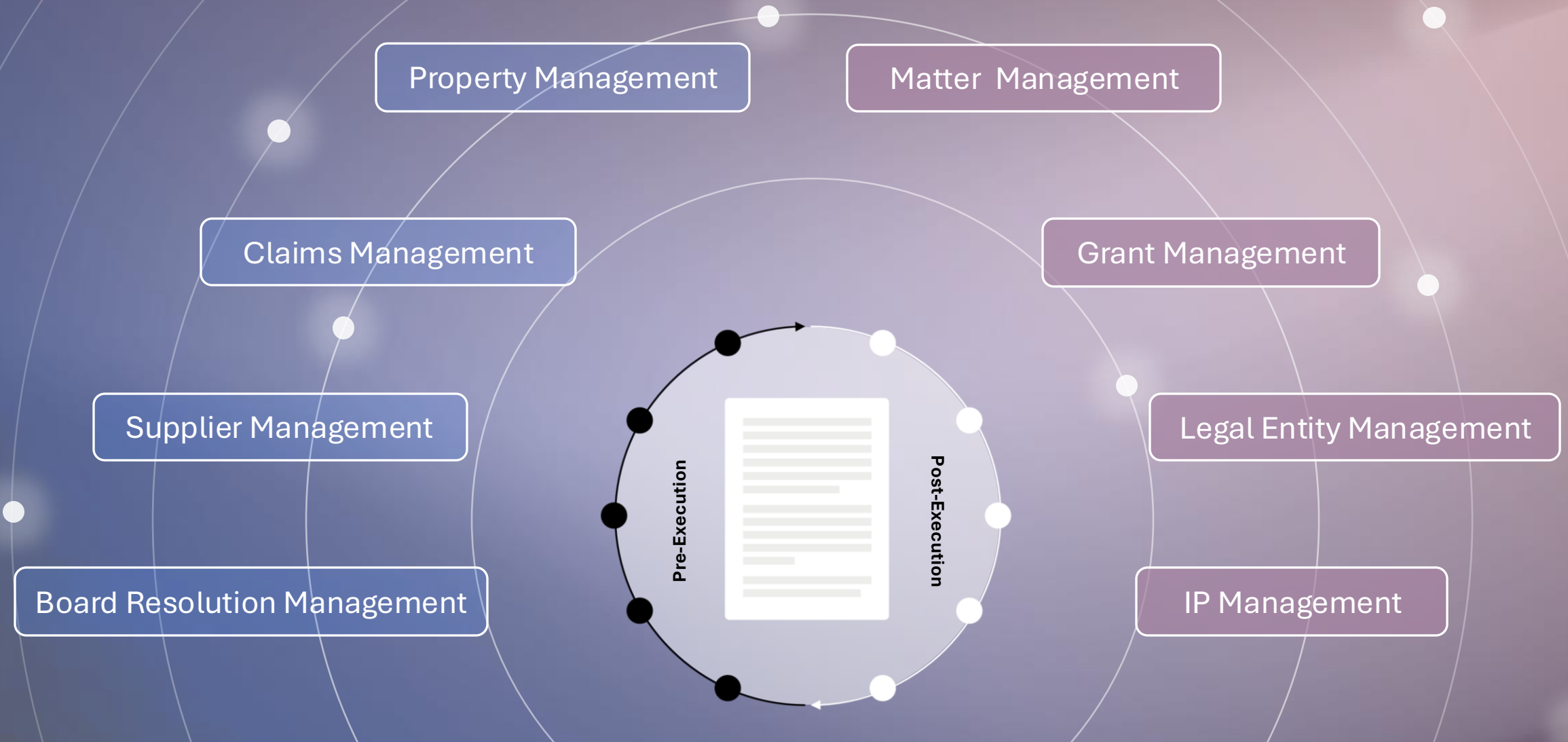


# Delivers greater efficiency for CRM-CLM activities



- Centralized & Secured Repository
- Dynamic Reporting
- Role-Based Dashboards
- Integration With Other Systems

# ...And Beyond Via The “Contract Ecosystem”



Our Next Webinar

# Leveraging Microsoft 365 for Contract Management

Date Wednesday – September 23rd  
11:00am ET, 8:00am PT

Register Now

Now Available

eBook

# Contracts 365<sup>®</sup> for Microsoft Dynamics

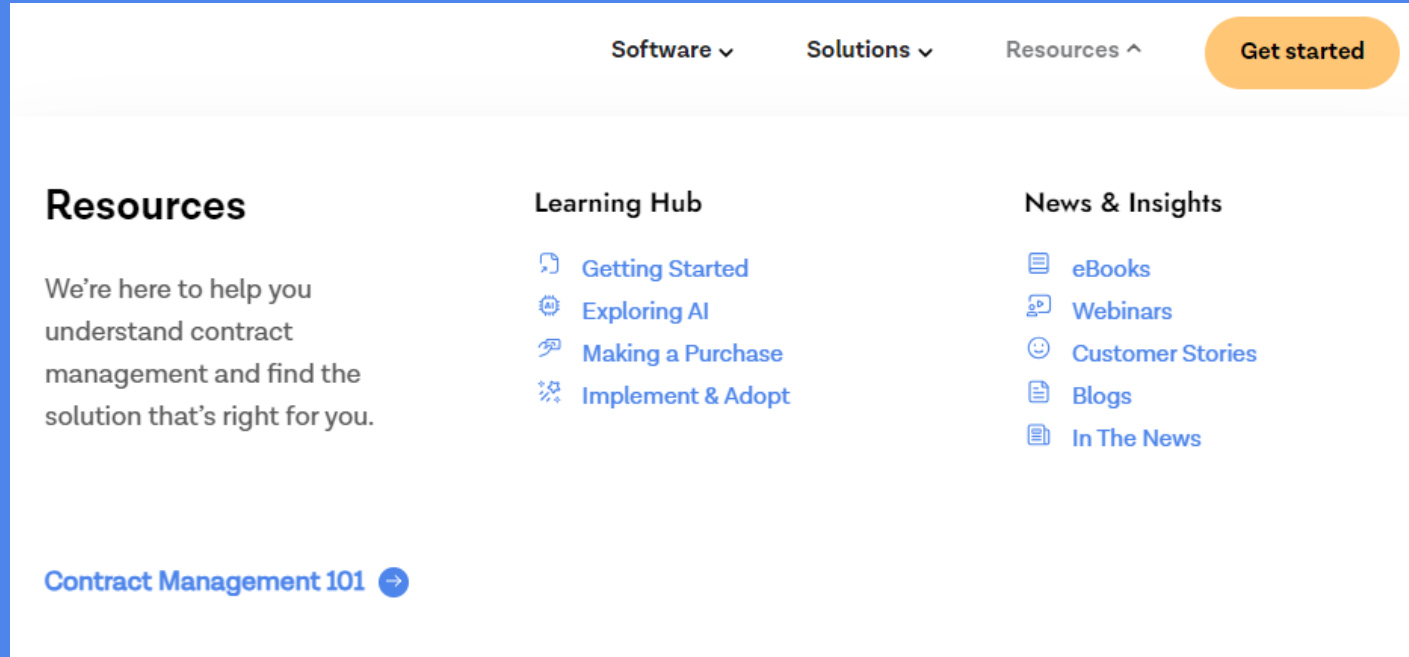


eBook

# Contracts 365<sup>®</sup> for Salesforce



# Visit the Free Resource Center at [contracts365.com](https://contracts365.com)



## Get in touch: [sales@contracts365.com](mailto:sales@contracts365.com)

# Demonstration –Contracts 365 Experience in CRM



DEMO

## Dynamics CRM User

- ✓ Find a contract
- ✓ Submit a contract request
- ✓ Check contract status



DEMO

## Salesforce User

- ✓ Find a contract
- ✓ Submit a contract request
- ✓ Check contract status



DEMO

## Core Team

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

# Thank you!

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