

# The Icertis Experience for Microsoft Dynamics 365



Dynamics 365

Increase revenue, reduce risk, and accelerate sales by connecting the quote-to-cash process to contract management.

## THE CHALLENGES FACED BY SALES ORGANIZATIONS

A disconnect between sales and the contracting process leads to **smaller deal sizes** and **missed opportunities**. In addition to **lost revenue**, a lack of coordination between departments can cause other issues, including:

- Delays in the QTC process have a **negative impact on timely invoicing and revenue recognition**.
- Manual contract management processes need additional resources to keep pace with a rise in sales volume, **increasing cost of sales**.
- Difficulty in enforcing standards results in maverick contracts, noncompliance and **significant legal risk**.
- Pressure to close deals becomes an unintentional incentive to compromise on contracting standards, resulting in **damaged reputations**.

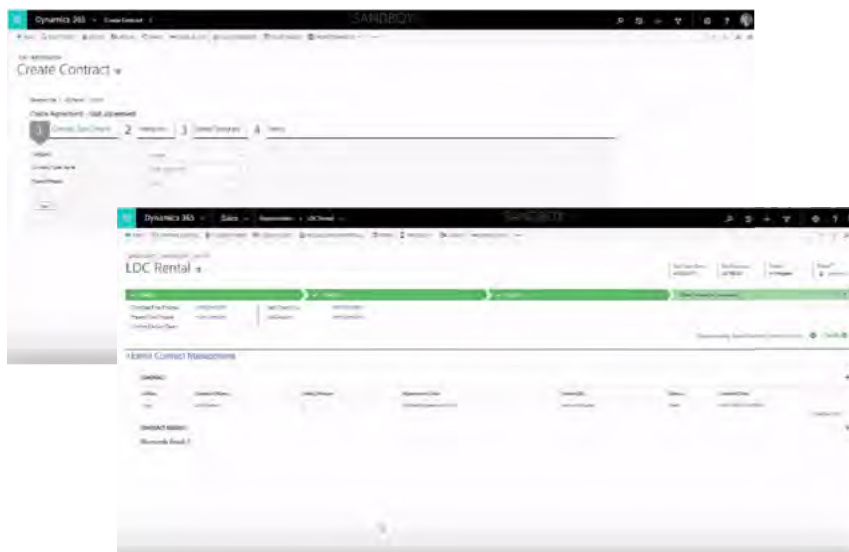
Experience the full capability of the Icertis Enterprise Contract Management (ICM) platform — **from within Microsoft Dynamics 365**.

Icertis, the leading provider of enterprise contract management in the cloud, solves the hardest contract management problems on the easiest to use platform. Icertis helps companies transform their commercial foundation ensuring compliance, improving governance, mitigating risk and enhancing user productivity, thereby improving the bottom line. The Icertis Contract Management (ICM) platform is used to manage 5+ million contracts by 2+ million subscribers at companies like 3M, Daimler, Microsoft, Roche and Wipro in 40+ languages across 90+ countries. For more information visit [icertis.com](https://icertis.com).

## HOW IT WORKS:

The **Icertis Experience** for Dynamics 365 works with the Icertis Contract Management (ICM) platform, providing a unified solution encompassing both Customer Relationship Management (CRM) and Enterprise Contract Management (ECM). Experience a full range of contract management features from within the Dynamics 365 application. Gain a competitive advantage by providing sales organizations with these capabilities:

- **Create contracts or contract requests with a single click** — without leaving the familiar Dynamics application.
- Leverage an intelligent rules engine to **manage contract authoring, workflow, milestones and approvals**.
- Negotiate contracts and track redlining and versioning **from within Microsoft Word**.
- Translate commercial terms such as products, pricing and deal information, into contractual data that's **easy to search and easy to measure**.
- **Eliminate errors** and duplication by automatically populating key attributes from Dynamics, into the ICM platform.
- Avoid mismatches or delays with the ability to **seamlessly transfer and synchronize data** between Dynamics and the ICM platform.



## KEY BENEFITS

Reduce the quote-to-cash cycle time to accelerate sales

Improve contract quality by facilitating collaboration

Reduce rework with easy-to-use templates and standardized language

Enable downstream compliance and report on key sales and contracting metrics

Identify, assess and automatically mitigate risk — without placing an additional burden on sales