

# Contract Lifecycle Management with Microsoft & Nintex



# About Gig Werks

*Be it in the Cloud with Office 365 or on premise, Gig Werks has delivered award winning targeted and focused business solutions for departments and industries, built on Microsoft SharePoint.*

## Awards and Recognition

- Microsoft Gold Partner since the firm's beginning in 2001
- Virtual Technology Specialists for the Microsoft New York Enterprise Group
- 5 Time Microsoft SharePoint Technical Excellence Partner Award Winner
- Approved Vendor of Microsoft Legal & Corporate Affairs Group (LCA)
- Invited into the Partner Evidence Program for SharePoint 2007, 2010, 2013 & 2016
- Nintex Partner Award Winner

## Solution Expertise for Full Microsoft Stack

- Office 365, SharePoint, Cloud Applications, Business Intelligence

## Solution Expertise for Full Nintex Stack

- Workflow, Forms, Hawkeye, Document Creation, Nintex Workflow Cloud

## Industry Business Solution Expertise in:

- Professional Services, Legal Firms & Departments, Facilities Management, Architecture/Engineering/Construction (AEC), Financial Services, Healthcare/Pharmaceutical



# 8,000+ Nintex Global Customers

## GIG WERKS & NINTEX MUTUAL CUSTOMERS



## MANUFACTURING



## GOVERNMENT



## FINANCIAL SERVICES



## RETAIL & CPG



## SERVICES



## HEALTHCARE



## ENERGY



## ENTERTAINMENT & MEDIA

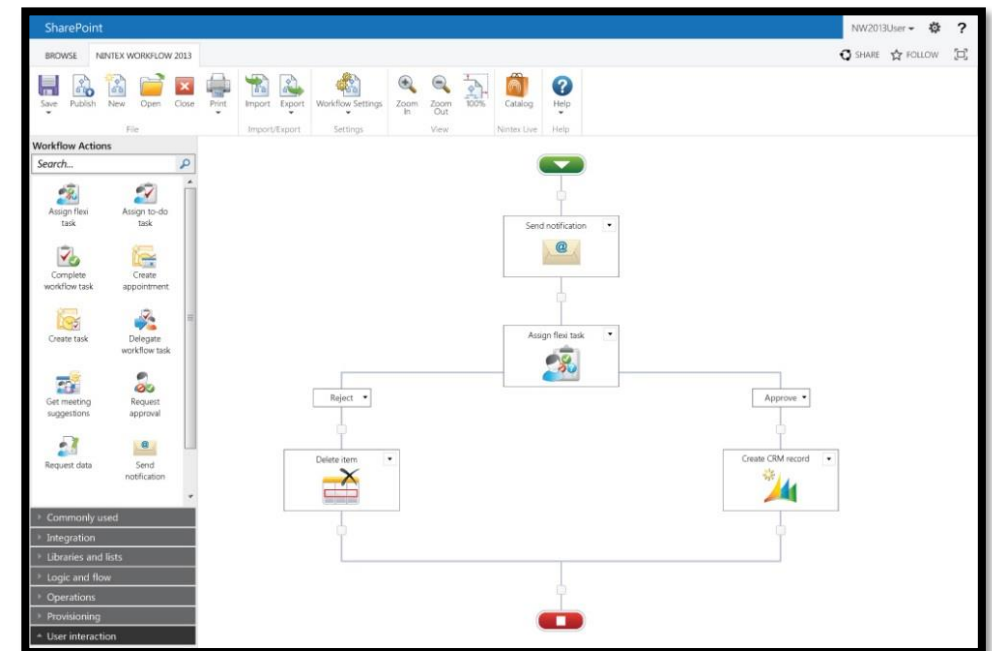


# Digitally Transform the Enterprise with Nintex

Nintex Workflow for Office 365 and SharePoint enables organizations to extend business process automation to more people, places and devices, delivering workflow for everyone. Nintex Workflow adds a drag-and-drop workflow designer, advanced connectivity, and rich workflow features to give customers more power and flexibility.

## Benefits and ROI of Nintex Include:

- Transform legacy systems and processes to advanced workflows & forms
- Reusable templates and modules
- Share and align business practices across teams
- Reduced IT burden
- Efficiency gains and reduced processing costs
- Measure and improve business performance
- Lazy Approval
- Agile & Innovative



# What is Contract Lifecycle Management?

- According to Wikipedia, **Contract Lifecycle Management (CLM)** is the proactive, methodical management of a contract from initiation through award, compliance and renewal. Implementing CLM can lead to significant improvements in cost savings and efficiency.
- We use terms like:
  - Cradle to Grave
  - Governed Process
  - Records Management
- While this all applicable, the successful implementation of a CLM is different, has different priorities and different criteria of success to all the different actors that play a role in that process



# Why Contract Lifecycle Management

## Sales

Significant efficiency gains in the assembly of a contract

Simplified management of contracts, start to finish to renewal

Manage & check status across multiple contracts & processes from creation to close to

Quicker contract turnaround

Avoid errors and typos through automation

Ensures contracts go through proper internal channels

## Pricing

Significant efficiency gains in the review & approval of contracts

Ensures pricing approves of contract before going to a client

Visibility into upcoming contract renewals

Simplified user experience: notifications & the contracts dashboard make it easy to stay on top of approval tasks

## Legal

Drives significant time savings & efficiency by simplifying review & approval of contracts

Ensures legal approval of contract before going to a client

Easy to find and access contracts and contractual terms

Simplified user experience: notifications & the contracts dashboard make it easy to stay on top of approval tasks

Version Control

## Client

Quicker turnaround & processing of contracts & agreements

Sign & approve contracts electronically and never need to leave Outlook

Secure External Communication

# Goals of Implementing a CLM

- **Automate** Contract and Document Generation
- **Governed, secure** cradle to grave management
- **Reporting** of all contract Lifecycle stages
- **Connect** users, business units in a seamless collaborative solution
- Avoid the “**one size fits all**”
- Drive agile development and rapid development of solution designed for **your enterprise needs**
- **Driving efficiency & accuracy** by eliminating rekeying of information
- Extend the ROI of **existing technology investments**
- **Extensible Value** across business units

# Two Approaches to CLM - Point Vs. Platform

## Point solution approach

Vertically tiered

Industry specific

Predictable results

Speed to market

## Platform solution approach

Reusable

Extended value to other business units

Scales horizontally and vertically

Leverage existing technology investment

Flexible: "The last 20%"

Best-of-breed



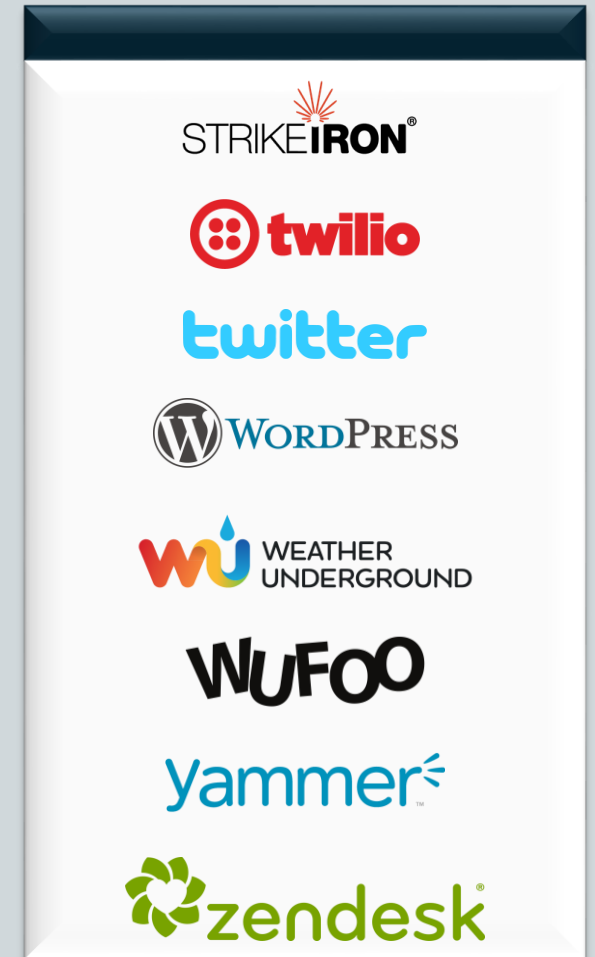
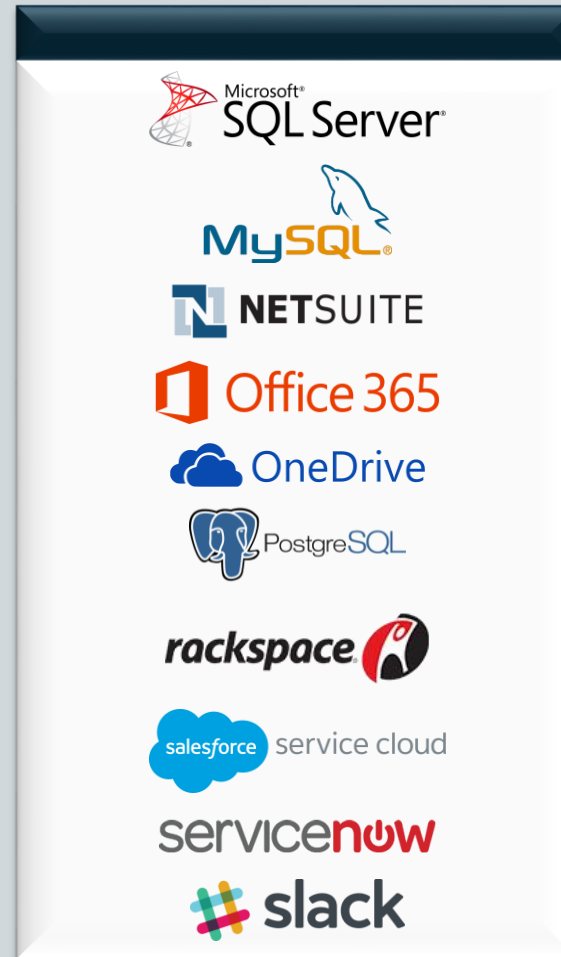
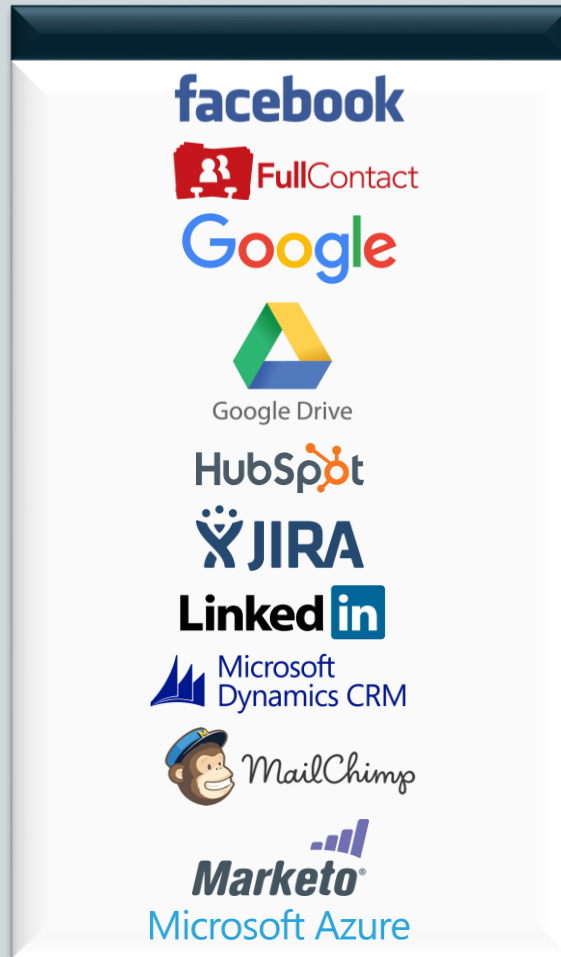
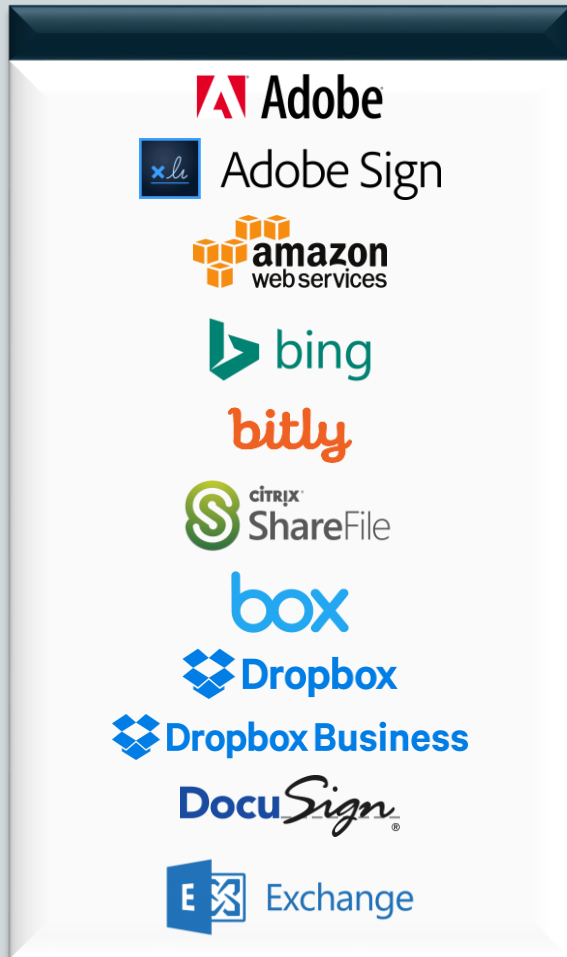
# Why CLM with Nintex

- Nintex Drives **Agile**
- Nintex **Connects** Systems
- Nintex **Automates** Content
- Nintex **Connects** Users & Decision Makers Through Workflow
- Nintex **informs** through Dynamic Reporting



# Connect information across the enterprise

Assemble content with pre-built Nintex Connectors to:



# Full Circle CLM Process with Nintex

**Sales**

**Pricing**

**Legal**

**Client**

**Sales**

- Determines a contract or agreement needs to be sent to a customer
- Sends Contract out for Review & Approval to be sent to client from Microsoft CRM, Salesforce or SharePoint

- Receives notification that a Contract has been generated
- Reviews Contract & approves/disapproves Contract

- Receives notification that a Contract has been generated
- Reviews contract & approves/disapproves contract

- Client receives a notification with Contract generated to review & sign with DocuSign

- Receives notification that Contract has been signed & saved to SharePoint
- Contract information is available for reporting with Nintex Hawkeye

# Sales Generates a Contract

Seamlessly Generate Contracts & Agreements in a Click Inside of Microsoft CRM, Salesforce or SharePoint

Notifications Let you know your Contract is in process and sent to pricing for review

The image displays two screenshots from a CRM system. The top screenshot shows the 'OPPORTUNITY' record for 'Executive Towers Owners Corporation - ProjectReady Central'. The record is in the 'Propose' stage of the 'Opportunity Sales Process'. Key details include: Est. Close Date: 2/16/2018, Est. Revenue: \$40,000, Status: In Progress, and Owner: Kathryn Ross. The 'General' tab shows the Topic as 'Executive Towers Owners Corporation - ProjectReady Central', Potential Customer as 'Executive Towers Owners Corporation', Sales Stage as '60 - Proposal submitted', and Contact as 'Joe Doe'. The 'Forecast Information' section shows an estimated revenue of \$40,000, a close date of 2/16/2018, and a contract effective date of 3/5/2018. The bottom screenshot is a notification from 'Contracts Management' titled 'New Subscription Agreement for Executive Towers Owners Corporation'. The notification includes the following details: Name: Executive Towers Owners Corporation - ProjectReady Central, Account: Executive Towers Owners Corporation, Est. Revenue: 40000, and Start Date: 3/5/2018.

# Pricing Reviews Contract

Pricing receives an email notification & task to review, approve or reject the generated contract directly from Outlook or their Contracts Dashboard

Upon Approval it is sent to Legal for Review

A screenshot of a SharePoint dashboard titled "Contracts Up for Review". It features a "Contract Priority" pie chart and a table of contracts. The table has columns for Name, Agreement Start Date, Total Agreement Value, and Account. Below the table is a "Legal Tasks" section with a task "Contract Review for Executive Towers Owners Corporation - ProjectReady Central" assigned to Lindsay Minnock on January 10.

Name	Agreement Start Date	Total Agreement Value	Account
MAIM-17-34214 - Three-Way NDA	2/22/2018	\$50,000.00	
MAIM-17-34214 - Non-Disclosure Agreement	2/22/2018	\$1,500.00	
EVER-17-56753 - Master Services Agreement	2/22/2018	\$50,000.00	
EVER-17-56753 - Reseller Agreement	2/22/2018	\$4,275.00	
NBCG-17-09645 - Gig Works - Reseller Agreement	4/25/2018	\$4,500.00	

This block contains two screenshots. On the left is an Outlook email from "reply@workflownotification.com" with the subject "Task Assigned - Pricing Review for Executive Towers Owners Corporation - ProjectReady Central". The email body says "You have a new task. Please review the document below: EXEC-17-54059 - Subscription Agreement". On the right is a screenshot of the "Contract Pricing Review" form in SharePoint. The form includes fields for "Task Name", "Assigned To" (Lindsay Minnock), and "Approval Decision" (radio buttons for "Approved" and "Rejected").

A screenshot of a "GIG WERKS SUBSCRIPTION AGREEMENT" document. The document header includes "Gig-Werks, Holdings Inc., 92 Main Street, Yonkers, NY 10701" and "Prepared for Executive Towers Owners Corporation, Proposed by Order Number EXEC-17-54059". The main body of the document contains several numbered sections: 1. CONSTRUCTION, 2. SOFTWARE AS A SERVICE (with sub-sections 2.1 Access, 2.2 Rights to the Service, 2.3 Updates, 2.4 Restrictions and Conditions), 2.6 Return of Hosted Data, 2.7 Delivery of Service and Materials, 2.8 Outages, and 3. SERVICES (with sub-section 3.1 Minimum Requirements).

# Legal Reviews Contract

Legal receives an email notification & task to review, approve or reject the generated contract directly from Outlook or their Contracts Dashboard

Upon Approval it is sent to the client for signature

Name	Agreement Start Date	Total Agreement Value
MAIM-17-34214 - Three-Way NDA	2/22/2018	\$50,000.00
MAIM-17-34214 - Non-	2/22/2018	\$1,500.00

Task Assigned - **Contract** Review for Executive Towers Owners Corporation - ProjectReady Central

reply@workflownotification.com  
Today, 2:33 PM  
Lindsay Minnock

Clutter

You have a new task. Please review the document below:

[EXEC-17-54059 - Subscription Agreement](#)

[Contract Review for Executive Towers Owners Corporation - ProjectReady Central](#)

ASSIGNED TO Lindsay Minnock  
DUE DATE 2/1/2018 2:32:12 PM  
DESCRIPTION  
RELATED ITEM [Subscription Agreement](#)

This task has been assigned to you. Reply with one of the following:

Approved  
Rejected

EXEC-17-54059 - Subscription Agreement

Gig-Werks, Holdings Inc.  
92 Main Street  
Yonkers, NY 10701

Prepared for Executive Towers Owners Corporation  
Proposed by  
Order Number EXEC-17-54059

### GIG WERKS SUBSCRIPTION AGREEMENT

This Gig Werks Subscription Agreement ("Agreement") is entered into by and between Gig-Werks, Holdings Inc., a New York State Corporation with its principal place of business at the address identified above ("Gig Werks"), and Executive Towers Owners Corporation ("Customer"), a New York State Corporation with its principal place of business at the address identified above. This Agreement sets forth the terms and conditions under which Gig Werks agrees to provide, and Customer agrees to obtain, access to the Gig Werks technologies, online services and database described herein.

- CONSTRUCTION.** CAPITALIZED TERMS (WHETHER IN THE SINGULAR OR PLURAL) SHALL HAVE THE MEANINGS ASSIGNED IN THE TEXT OF THIS AGREEMENT, INCLUDING THE INITIAL ORDER SET FORTH IN EXHIBIT (THE "ORDER"), AND ITS EXHIBITS AND ADDENDA.
- SOFTWARE AS A SERVICE.**
  - Access.** Commencing on the Effective Date of this Agreement, Gig Werks shall make available to Customer the unique instance of the Gig Werks software identified in the Order (and further described in the Product Descriptions set forth in Exhibit B) for uses described in the Order, and subject to the limitations set forth therein (the "Service") under the terms of this Agreement.
  - Limits to the Service.** Subject to the terms and conditions of this Agreement, Gig Werks hereby grants Customer a non-exclusive, non-transferable, worldwide right during the Term to access the Service and permit the number of individual users specified in the Order to use the Service ("Authorized Users"). Unless otherwise specified, the term "quantity" as used in the Order refers to the number of Authorized Users that are permitted to access the associated product or service.
  - Updates.** At no charge to Customer, Gig Werks shall install on its servers any software updates deemed reasonably necessary to address errors, bugs or other performance issues in the Service (collectively, "Updates"). Updates (if any) shall be subject to the same terms and conditions of this Agreement.
  - Restrictions and Conditions.** Customer shall not, directly or through its Authorized Users, employees and/or the services of independent contractors: (a) attempt to sell, transfer, assign, rent, lease, sublicense or otherwise provide the Services;
- SERVICES.**
  - Minimum Requirements.** The Service relates to Microsoft's SharePoint service, but does not include Customer's access to SharePoint. For the avoidance of doubt, Customer is responsible for maintaining its own license with Microsoft (or an authorized reseller) to the SharePoint service/software. To help set expectations with respect to what is included within the scope of the Service, Customer

2.6 **Return of Hosted Data.** If requested by Customer within thirty (30) days of the expiration or termination of this Agreement, Gig Werks shall make available to Customer all Customer data stored within the Service at the time of expiration or termination. Thirty (30) days after termination, Gig Werks shall have no further obligation to Customer and may, at its option, permanently delete or destroy the Service and all information and materials contained therein.

2.7 **Delivery of Service and Materials.** The Service, and any updates, maintenance releases thereof, shall be made available only on a hosted basis, and will not be delivered in object code or physical media to Customer. The Service, and any deliverables provided under this Agreement will be delivered only through an electronic transfer.

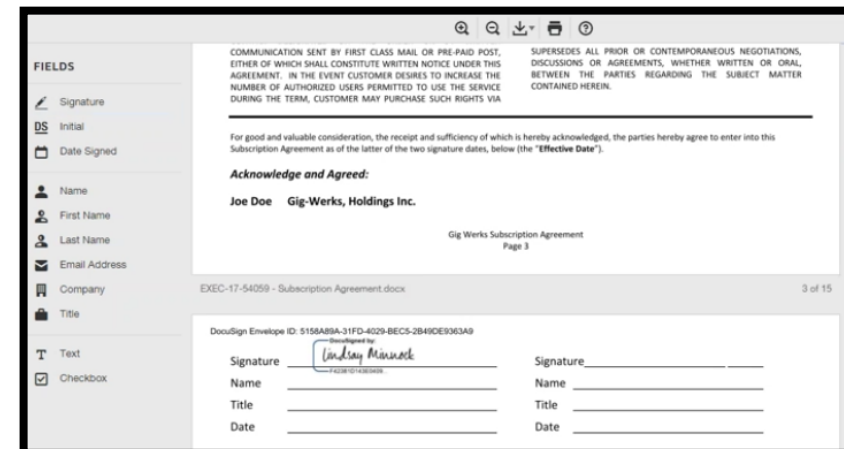
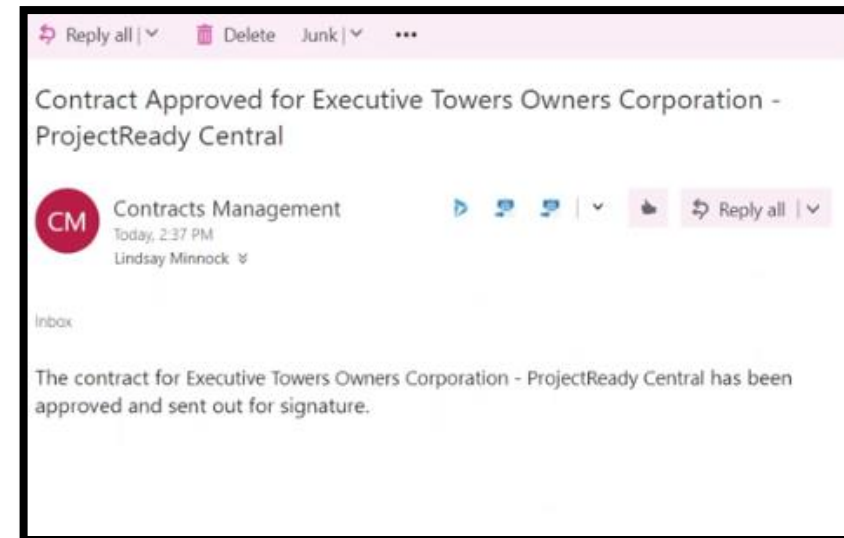
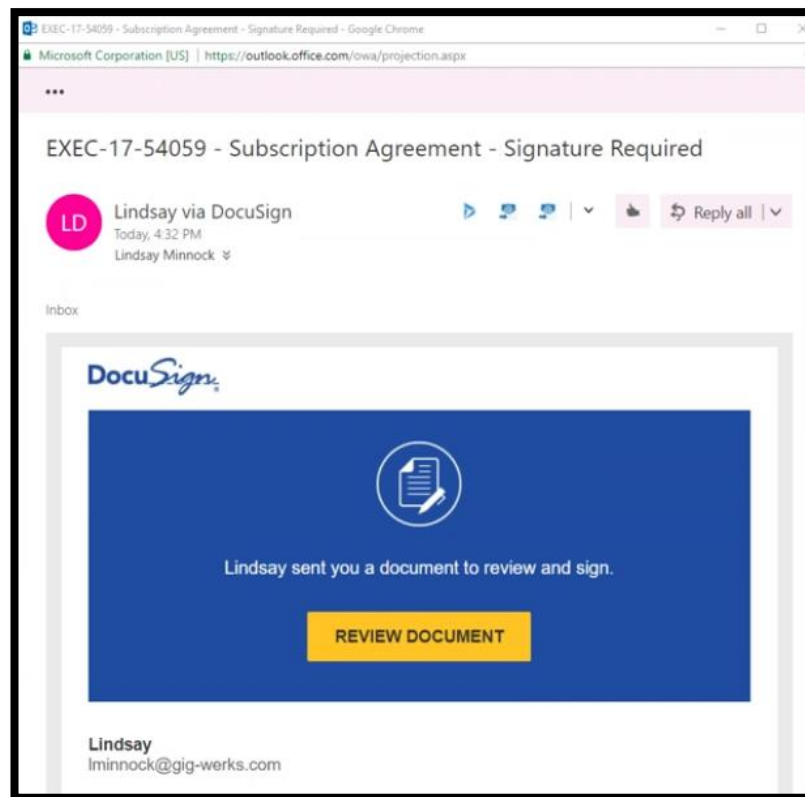
2.8 **Outages.** If Customer exceeds the number of active projects licensed in an applicable Order (or such other metric for pricing as is agreed upon by the parties in an applicable Order), Gig Werks will notify Customer of the excess usage and Customer must within thirty (30) days, (i) reduce its usage to conform to the agreed upon scope limitations, or (ii) purchase additional licensed rights from Gig Werks pursuant to an addendum to the existing Order. For the avoidance of doubt, Gig Werks reserves the right to suspend access to the Service to the extent Customer exceeds the scope of its license.

# Send to Client for Signature

Sales is notified the contract is approved and sent to the signatory

Client receives email notification with a link to the contract to be executed via DocuSign

Upon Signature Sales is notified and the contract saved to SharePoint



# Signed & Saved to SharePoint

Sales is notified the contract has been signed

The Opportunity is Marked Closed in CRM

The Contract is saved with applied metadata (descriptors) into SharePoint

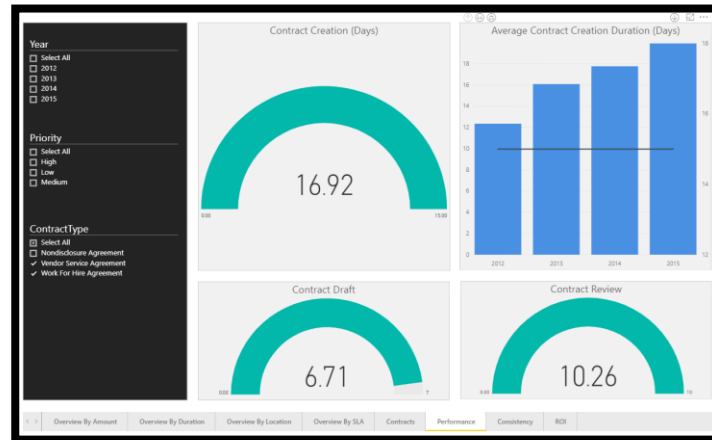
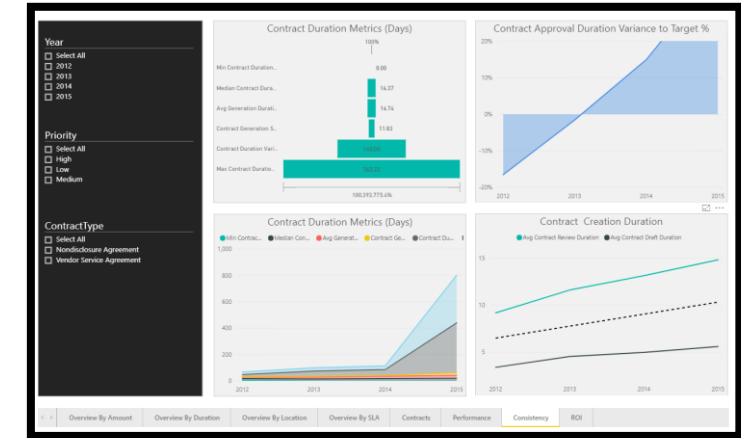
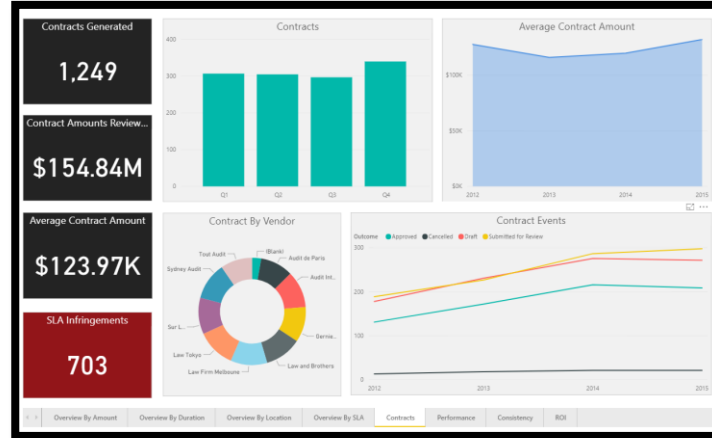
The image displays two screenshots from a CRM system. The top screenshot shows an 'OPPORTUNITY' record for 'Executive Towers Owners Corporation - Projec...'. The opportunity is in the 'Develop' stage, having moved from 'Qualify (Active for 54 days, 4 hours)'. Key actions include 'Identify Contact' (Joe Doe), 'Identify Account' (Executive Towers Owners), and 'Purchase Timeframe' (Next Quarter). The 'General' section shows the topic as 'Executive Towers Owners Corporation - ProjectReady Central', potential customer as 'Executive Towers Owners Corporation', and sales stage as '60 - Proposal submitted'. A red box highlights the 'Contract Status' field, which is set to 'Signed'. Other fields include 'Create NDA' (Yes), 'Create MSA' (Yes), and 'Create Subscription' (Yes).

The bottom screenshot shows the 'Contracts' management interface. It features a navigation pane on the left with options like 'Approval Matrix', 'Contracts', 'Contract Templates', and 'Contract Records'. The main area displays a table of contracts. The table has columns for contract ID, name, date, user, and status. The table is filtered by account, showing two accounts: 'Gig Werks - Nintex Services' and 'Nintex - Gig Werks Reseller Agreement'. The table lists several contracts, including 'EVER-17-56753 - Master Services Agreement' and 'EVER-17-56753 - Reseller Agreement'. The bottom section of the table shows contracts for 'Executive Towers Owners Corporation', including 'EXEC-17-54059 - Subscription Agreement' with a status of 'Contract Signed'.



# Tracking & Reporting

Get reporting and analytics on all your contracts & generated documents throughout their lifecycle with Nintex Hawkeye



# Extend Value Across the Enterprise with the Ability to Automate the Creation of:

Contracts  
Quotes  
RFP's  
Proposals  
Account plans  
Inventory reports  
Activity logs  
Case history

Pipeline reviews  
Renewals  
Response letters  
Work order summaries  
NDA's  
MSA's  
Licensing agreements  
Consumption reports

Financial pitch books  
Statements of advice  
Annual reports  
Invoices  
Quote metrics  
Forecasts  
Business reviews  
Commission reports

Legal advice  
Terms and conditions  
Customer  
Correspondences  
Notifications for doctors  
Pharmacists and customers  
Project summaries  
Candidate profiles  
Repair orders



Any content, any source



Create Documents

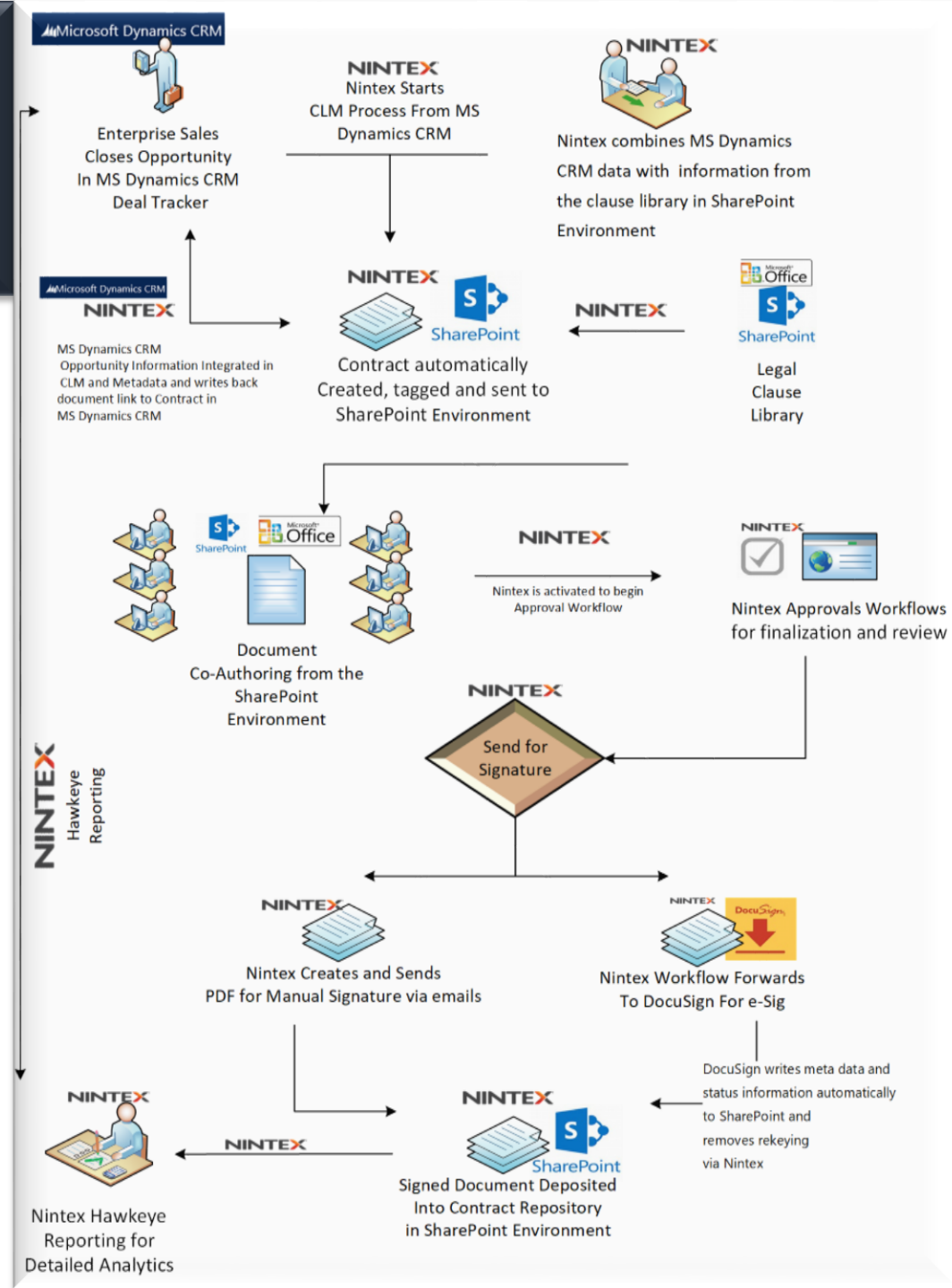


Consistent Delivery

**NINTEX**

# A Day in the Life with Nintex CLM & CRM: Demo

**Christian Holslin**  
 Enterprise Architect,  
 Director of Client Services



# Questions & Answers

## Contact Us

[www.Gig-Werks.com](http://www.Gig-Werks.com)

[salesinfo@gig-werks.com](mailto:salesinfo@gig-werks.com)

914-207-1110