



ClearPoint Health, an innovator in affordable healthcare markets, selects Contracts 365 to accelerate sales.

For ClearPoint Health, integrating Contracts 365 and Dynamics 365 was a clear win.

NEWBURYPORT, MA, UNITED STATES, June 25, 2025 /EINPresswire.com/ -- [Contracts 365](#), the leading provider of Contract Lifecycle Management (CLM) software for Microsoft 365 customers was recently selected by [ClearPoint Health](#) to streamline its contracting processes with a robust Microsoft Dynamics 365 integration.

Headquartered in Columbia, SC, ClearPoint Health is a digital alternative funding solutions marketplace that empowers benefit advisors to offer progressive, transparent and affordable health insurance to small and mid-sized businesses. With a focus on innovation, transparency and clinical integration, ClearPoint Health provides solutions that not only meet the financial needs of employers but also enhance the healthcare experience for employees.

"We're engaging with more and more organizations who are looking for true interoperability between their customer relationship management and contract management systems," said Dave Sandstedt, Vice President of Marketing at Contracts 365. "ClearPoint Health chose Contracts 365 largely because of how seamlessly we integrate with Dynamics 365. It's becoming a powerful differentiator for us across many sales-driven sectors."

ClearPoint Health is a platform that's working to make alternative funding simple and effective for benefit advisors. The organization works with numerous types of counterparties, including benefits advisors, employers, and healthcare vendors, so their business relies on highly efficient customer relationship management.

"Contracts 365 has consistently proven to be the best CLM solution available for Microsoft customers," noted Taylor Stott-Trout, Deputy General Counsel for ClearPoint Health. "After reviewing competitive products, it was clear. There is simply no better solution that integrates with Dynamics 365 Sales."

Contracts 365 is designed to integrate tightly with leading CRM vendors, including Microsoft Dynamics 365 and Salesforce. This allows users to request and create contracts with a click of a button, and without ever leaving their CRM dashboard, resulting in faster time to close and accelerated revenue recognition. What's more, because Dynamics 365 and Salesforce bi-

directionally sync data with Contracts 365, Opportunities are automatically updated, and notifications sent, when contracts come up for renewal or are about to expire.

“We know firsthand that sales teams spend most of their time in their CRM systems. Being able to instantly auto-populate forms and requests with data that already lives in their CRM database as an Opportunity is a real game changer,” noted Sandstedt. “And contracts can move into approvals faster than ever before.”

“Healthcare insurance is a highly contract-intensive business, and we’re seeing more and more interest from these types of organizations,” said Sandstedt. “And it’s not just to streamline their contracting process, but also to help them leverage their data better and work from a single source of truth.”

He continued. “The beauty of Contracts 365 is that we can be that source of truth, or we can work with Dynamics or Salesforce or ERP systems, allowing them to be the source of truth. Either way, your contracts are in complete alignment.”

To learn more, read the full [ClearPoint case study](#).

About Contracts 365[®], Inc.

Contracts 365 is powerful contract lifecycle management software purpose-built for Microsoft 365 customers. Our intuitive, cloud-based CLM software leverages our customers’ strategic investment in Microsoft applications, architecture, and security to give them unparalleled control of their private contracts and data. With world-class implementation and support of industry-specific contract management solutions, Contracts 365 helps you discover the power of your contracts, every day. Learn more at www.contracts365.com.

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