



Summize



Case Study

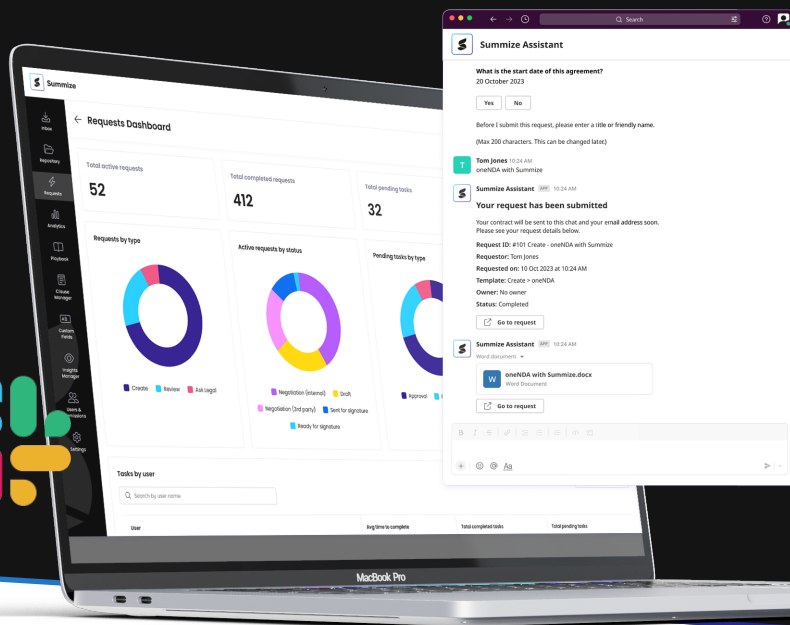
Matillion's journey to seamless contract management with Summize

Company
Matillion

Location
Global

Industry
SaaS/software

Size
500-1000



Objective

Matillion emerged in Manchester in 2011, with the goal to revolutionise business intelligence in the cloud. The company has grown significantly since their 2011 creation, now a global data pipeline platform based in the UK and Denver, transforming the automation of data for thousands of enterprises such as Cisco, Slack and Pacific Life.

But as Matillion scaled globally, their internal legal team, led by Kimberly Trull, faced significant challenges with their existing Contract Lifecycle Management (CLM) software, which had limited functionality and was time-consuming when it came to locating contracts. Kimberly had already worked with several CLM providers in the past and in her own words "it's not always a great experience". Therefore, she knew the search for the perfect CLM, and full business adoption, would not be easy.

Kimberly sought a more collaborative solution that allowed the legal team to engage with sales and the business' stakeholders much more efficiently within Salesforce. The aim was for sales to manage their own contract processes, with legal overseeing the operations, but not needing to be involved in every stage of the contract lifecycle.

With a sales team of over 100 people, the self-serve approach was key. Kimberly also knew that their contract process needed to be managed from start to finish and ideally work within the tools Matillion used daily – including Salesforce, Slack and Microsoft Word.



Sales can now work directly within Word and Slack for their NDA and contract needs. Our legal team sets the workflows, and Summize takes care of the rest. This allows us to focus on more strategic initiatives.

Kimberly Trull, Head of Legal

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Key Outcomes

Self-serve approach
for over 100
sales colleagues

Seamless legal
approvals, leading
to faster revenue
generation and growth

Sales can now create
NDAs and contracts
directly within
Word and Slack



We did a really thorough process when choosing our next CLM. We truly looked at 10 different vendors, including the one we currently had, and Summize was the best. It beat out everything, and we felt that we would be a really treasured customer based on how we were treated during the process.

Kimberly Trull, Head of Legal

Solution

After an evaluation process involving over 10 CLM providers, Matillion chose Summize's Contract Lifecycle Management software.

Matillion was drawn to Summize's intuitive, AI-powered features and outstanding customer support.

But it was ultimately the approach to integrations and Summize's decentralized approach to CLM made Summize come out on top in Matillion's search. By integrating contract workflows directly into Matillion's familiar tools (Microsoft Word, Slack and Salesforce), Summize enabled Matillion's sales team to manage contracts without needing constant legal oversight. As part of the proof of value phase, Kimberly got the support of her legal colleagues as the legal department will use the tool more than any other team, but also from the sales organisation to find a tool that also met their needs.

The Outcome

During their implementation, where Kimberly states "I really felt taken care of as a customer", Matillion already began to see the benefits of the Summize CLM solution. From faster contract turnaround times, to improved legal oversight, to seamless user experience.

Just like many organisations, the business at first was more risk-averse to AI features. However, after seeing Summize's AI in action, the legal team recognised how beneficial AI can be for automating their daily manual tasks, allowing them more time to focus on the higher-value strategic work.

Ultimately, the main highlight and goal for Matillion is the ease of Summize's integrations with Microsoft Word, Slack and Salesforce, which enables both the sales and legal team to stay within the tools they already know and love. The integrations not only lead to faster contract turnaround times, but improved collaboration between the two departments.



We've had a great implementation partner. Our questions were answered promptly, and we hit all the key dates we wanted to hit. The product just works, and the customer experience has been excellent from start to finish.

Kimberly Trull, Head of Legal



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