

Case Study

How Convey rebuilt legal trust with their CLM

Company

Convey

Location

USA

Industry

Software

Size

SME



Objective

When Convey's new legal team - made up of just two people, Legal Manager Laura Salinas and Contracts Administrator Lee Dorman - joined the business, they stepped into an environment where the legal function wasn't fully aligned with the broader goals and interests of the company. Laura and Lee knew they had to reestablish the function so it could better support not only their legal goals, but the organization as a whole.

One of the first areas, of many, that Laura and Lee reestablished were the company's contracting processes.

Before implementing Summize, the company had no formal contracting workflows nor a Contract Lifecycle Management (CLM) solution. Non-legal teams were creating and sending their own contracts to customers because it felt faster and there was little trust that the legal function could support them. This created serious challenges with outdated templates, inconsistent pricing terms, lack of approvals and communication gaps across the business.

Convey began looking for a much needed CLM solution that would work for how the business operated, but paused the process to allow the new Legal Manager to make the decision. When Laura joined, she quickly resumed the search and instantly fell in love with Summize. Laura could see how Summize would be the perfect partner to help achieve Legal's goals, such as:

- A central, reliable source of truth for all contracts
- Complete transparency and visibility into workflows and existing contracts for the entire business
- A way to manage high request volume with a small legal team

But overall, there was an even bigger goal that the team had on their minds: rebuild processes, rebuild trust, and create a scalable, consistent contracting system.

“Contracts were stored in a company SharePoint, but also in many cases they were stored by individual sales reps, which meant they were all over the place. There was no real managing the CLM process. There were missing contracts, contracts stored without signatures, we didn't know what version we were using. It was chaos, like true chaos, so we were starting from the ground up.”



Lee Dorman
Contracts Administrator

Solution

“Our selling points focused on the organization we’d achieve, the access Summize would provide, the single place where the business could get all of the resources, where they could in one place submit a request, all the visibility that it also provided, and the transparency was huge!”



Lee Dorman
Contracts Administrator

Convey moved forward with Summize to bring order, structure and visibility to their contracting process. They began implementation, focusing on Outlook and DocuSign integrations as they knew these embedded CLM integrations would be vital for the rest of the business. Although implementation began with some technical challenges, the support from the Summize team made a strong impression. As Lee put it, “*our Implementation Manager, Mariana, was so incredible and helpful and she really stuck with us and made sure we had as much support as possible.*”

The team knew they couldn’t carry out the implementation project alone and they knew the strength in working with the right CLM partner. Summize helped determine which templates the business needed, any early structures and workflows they could get underway, and most importantly, Summize’s Implementation Team helped drive business-wide adoption.

Laura and Lee launched Summize during the company’s annual Sales Kickoff, supported by launch and adoption materials from Summize. The pitch resonated well as the team sold the future of what Summize looked like, its ease of use and how it would help the business achieve better transparency, collaboration and one simple source of truth.

The reaction from the business was what the legal team needed! They had faith in Laura and Lee’s message and could see the dedication and hard work they had put into the project!

The team built on the momentum when it came to the software’s roll-out and training by delivering team-specific sessions, working with internal champions to ensure greater success, and also offering office hours to help build the trust and credibility they knew was needed.

The Outcome

Even after only a few months of usage, it’s clear to Convey that Summize’s CLM has transformed the business’ contracting from scattered and inconsistent to organized, transparent, and highly efficient. Everything is now in one spot, with email records, relevant attachments, and versions. No longer does the business need to click through various folders and email threads to find what they are looking for. The impact on turnaround times and getting the business the answers and information they need is now immediate.

Crucially, Summize has helped rebuild trust between Legal and the wider business. With clear visibility into contract status, approvals, and conversations, non-legal teams know exactly where their requests stand. Legal is now very much seen as a responsive partner and no longer the ‘the department of no’.

Summize also gives Convey the data they need to manage volume, demonstrate efficiency, and plan for future resourcing. Even in the first few months of usage, the business’ contracting statistics have vastly improved and only keep getting better!

- 91% increase in requests submitted
- 112% increase in contracts stored in their CLM repository
- 53% reduction in the time it takes to execute agreements!

The increased efficiency has expanded the legal team’s capacity, allowing them to support strategic work, prepare for future acquisitions, and run more proactive projects.

What is now vital for Laura and Lee is ensuring Summize remains the central source of truth. Every time a legacy contract is referenced, they make sure the document is uploaded into Summize and that the associated data is clean and accurate. This is a significant task for any organization and Convey recognizes the long-term value of getting it right. So much so, the team is hiring a contractor dedicated to cleaning up legacy documents, linking the correct contracts, and strengthening trust in the audit trails that Summize now enables.

Overall, Summize has brought consistency, transparency, and control to Convey’s contracting process, enabling the business to collaborate smoothly and move much faster than before.

“As Legal Manager, finding a CLM solution that truly met our needs was essential – and Summize has delivered on every front. The platform is incredibly user-friendly, making it easy for our team to adopt and use effectively. It has significantly simplified our contract management processes, helping us stay on top of key details and deadlines with confidence. We no longer worry about missing critical information or dates thanks to the platform’s smart tracking and intuitive design. Summize was exactly what we needed to replace our outdated SharePoint system. It’s modern, efficient, and tailored to the way legal teams work today.”



Laura Salinas
Legal Manager