

Case Study

How CLM creates strong visibility and communication across the whole business

Company

Edpuzzle

Location

USA

Industry

Education, software

Size

Mid-size



Objective

Edpuzzle, a U.S.-based edtech company founded in 2013, provides intuitive video-based learning tools that enable educators to create interactive, engaging lessons for their students. Over the past 12 years, the company has experienced significant growth, driven by the increasing demand for personalized and technology-enhanced education.

As a business grows, it can be challenging to keep processes evolving at the same pace. This was becoming apparent for Edpuzzle's legal team who recognized the need to simplify and uniform their contract management processes.

"As the business started to grow and the number of customers and the deals that we had to sign off and agreements that we had to negotiate, we realized that the complexity of managing those agreements was increasing," explained Julia, Director of Operations and Legal.

The legal team began searching for a software solution that would offer the same ease of use and empowerment as their own software provided.

Along with ease-of-use and empowerment, Edpuzzle had additional, clear objectives of what they wished the software to achieve – clear visibility of contracts and workflows, an efficient tool that would reduce legal administrative work, and the ability to store and manage all contracts in one place.

The legal team concluded that a Contract Lifecycle Management (CLM) solution would be the most effective choice to meet the whole business' needs.

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Director of Legal & Operations

Solution

“Previously, Sales would loop Legal into customer emails and hand over the conversation entirely. This often led to confusion, delays in gathering contextual information, and disconnects with the customer experience. Now, Sales remains the main point of contact and provides all necessary contract details up front. This shift has reduced back-and-forth and improved the speed and clarity of legal reviews.”



Julia Trius
Director of Legal & Operations

The team then began their CLM buying journey, following a structured vendor evaluation process. After attending a series of demos and narrowing down the CLM vendors, Edpuzzle chose Summize not only for its strong CLM capabilities, but for its partnership approach.

At Summize, we pride ourselves on both our implementation and customer success approach. Implementing new tools and managing changes to business processes can be challenging for any organization, therefore we help reduce the burden by becoming a true partner in the whole process.

Following on from your implementation, our Customer Success Team are much more than a support function. They work closely with businesses, maintaining ongoing engagement to ensure each organization gets the most value from their CLM solution. This is what drew Edpuzzle to Summize.

After the selection, the business began its CLM implementation by initially focusing on the sales team, in order to manage the highest volume of agreements and drive use of Summize's Salesforce integration.

The sales team is not the only department to be involved, and benefit from Summize's CLM:

- Content Development Team: Using Summize's "Create" function and benefiting from the ease-of-use and standardized templates to create service agreements.
- Reseller Partnerships Team: Managing international distributor contracts.
- Community Team: Creating and tracking guest speaker agreements.

The legal team has improved efficiency by making it easier for non-legal colleagues to participate in the contract process. This allows the legal team to focus on more intuitive CLM features, such as Summize's contract review functionality, "we are trying to speed up on the AI redlining, creating rulebooks and playbooks," said Laura, Senior Legal Counsel, highlighting the team's ambition to optimize the review process even further.

The team also praises Summize's contract analytics dashboard, which provides clear data to help monitor the legal team's performance and workload distribution.

The Outcome

Edpuzzle shows how effective contract management comes from involving the entire business in the process. Company-wide CLM adoption, combined with intuitive CLM features designed specifically for legal teams, has created better contract processes and reduced contract turnaround times for the whole business.

Julia noted that the biggest change has been with the day-to-day operations:

"The day-to-day activity for me is the game changer! Legal receives the agreement already in the format that is required and can start the review without having to do all that admin work." Julia

The manual back-and-forth of emails and uploads is no longer an issue for Edpuzzle, thanks to Summize's simple intake process.

This intake process, along with the universal knowledge base of all contracts and workflows, has greatly improved cross-functional communication across the company. The legal team now has the time and resources to take a step back and gain a clearer picture of the volume of agreements, who is reviewing what and in which stage the contract is in the process, "Summize has helped the team meet SLAs more consistently by eliminating time spent on administrative tasks."

While the team is still rolling out AI contract review features, such as AI redlining and clause playbooks, expectations are high, *"the main tool that will help us to reduce time will be the AI redlining function,"* Laura noted.

Aside from the CLM features which help Edpuzzle manage their contracts in a productive and efficient way, what stands out most for the company is the Summize partnership, *"the team is always there, they are reachable, responsive and they care,"* said Julia.

Summize has become an essential contracting tool that supports Edpuzzle's growing legal and business operations.

"We're using Summize as the center of communication between sales and legal and the place where all the updated versions of redlined agreements could be uploaded"



Julia Trius
Director of Legal & Operations