

Case Study

From year-long search to CLM success: visibility, governance and adoption at Revinate

Company

Revinate

Location

USA

Industry

Software

Size

Mid-size



Objective

As the head of Legal Affairs at Revinate – a US based, AI powered customer data platform for the hospitality industry – Trish Littrell was responsible for managing thousands of contracts with limited resources and no centralized contract management system. Contracts were manually tracked, visibility was limited across the business and critical information was often difficult to find when stakeholders needed quick answers.

Common across many legal teams without technology, contract management relied heavily on spreadsheets and time-consuming manual processes.

Following an acquisition in 2021, Trish faced growing contract demands and even more fragmented processes. To support the company's next stage of growth, she highlighted to her stakeholders the need for a contract lifecycle management (CLM) solution that would introduce greater structure, visibility and control across the business.

“Someone would ask me how many customers have their own bespoke DPA for example and I wouldn’t be able to answer them. We had thousands and thousands of contracts and it was impossible to track all of them. I knew this needed to change!”



Trish Littrell
Legal Affairs

With approval and budget secured, Trish began her CLM search with two clear objectives in mind:

- Centralize contracts in a searchable repository so that the business had visibility which it currently lacked.
- Introduce standardized workflows, with the aim to improve governance and create greater accountability across the growing number of contract reviews and approvals.
- Trish included her Senior Director of Corporate Support, IT and Vendor Management, Nicole VanHaren Betzler, in the evaluation process, as well as the Business Operations team during demos to determine whether the solution could integrate with Salesforce.

Several CLM tools were ultimately ruled out. One required users to log into the platform to participate in workflows, which raised concerns about the ease of adoption across the business. Another used a pricing model based on contract repository volume, making long-term costs difficult to justify given the large number of contracts Revinate needed to store.

After more than a year of evaluating the market, Trish and Nicole ultimately selected Summize as Revinate's chosen CLM solution.

Solution

“I ultimately found the quality and the design of Summize to be user-friendly. Because in my mind, the biggest thing that I wanted to achieve with getting a CLM was user adoption. Because if you get a CLM and users aren't using it, what's the point?”



Trish Littrell
Legal Affairs

Summize was selected as Revinate's CLM solution as it stood out for its intuitive user experience, flexible pricing structure, and ability to support adoption across the organization – a USP that many Summize customers benefit from!

As Summize integrates into everyday business tools used by Revinate teams, Trish knew that non-legal users wouldn't need to log into or learn how to use another platform. Everything the business needed for requesting and tracking their contracts could be done via the tools the business already knew.

As well as the high usability aspect, Summize addressed Revinate's immediate need for contract visibility, as well as the business' longer-term goal of creating scalable contracting processes that could grow, just as the business would.

When it came to implementation, Revinate had a firm deadline to hit. As they were transitioning away from their third party vendor management platform, they needed to migrate all contracts before the tool expired.

Alongside the migration, Trish and Nicole worked hard to configure workflows and establish the foundations for long-term success. While there was considerable work involved in organizing the data and refining processes, the team's Summize Implementation Manager was pivotal to their success and helped the business move quickly and efficiently, “we loved our Summize Implementation Manager. She was the best!”

Solution

"Now we have visibility into the whole entire third-party vendor tech stack."



Trish Littrell
Legal Affairs

Today, Revinate uses Summize's CLM for the centralized repository, intake workflows, approval routing and search capabilities to manage their third-party vendor contracts, and soon all of their sales contracts too.

Every new vendor contract and renewal is submitted through Summize, which has created a structured workflow involving legal, finance, security, engineering, architecture, and other relevant stakeholders.

This new workflow allows the business to scrutinize every renewal that comes through the system, and gets the team to ask questions on whether they need a certain tool, or are they paying for a service that is no longer used? The business now has visibility across all their renewals and can act before it's too late.

The Outcome

As well as the vastly improved visibility, the business benefits from Summize's configurable intake forms, which capture important information relating to AI functionality, security requirements, and vendor risk upfront. This process helps create greater oversight across the vendor ecosystem, and yet again allows the business to act sooner rather than later.

"Now it's very much formalized. We have transparency into all of it and it just helps everybody."

What was once an informal and fragmented process has evolved into a formalized system that improves contract governance at scale.

Perhaps most importantly, Summize has helped Revinate achieve one of Trish's primary objectives: user adoption. The platform's user-friendly design has encouraged engagement across the organization, helping to embed contracting processes into everyday business operations.

What began as a need for contract visibility has become a company-wide framework for governance, accountability, and more informed decision-making. With vendor contracting now standardized and Salesforce integration planned as the next phase, Summize is helping Revinate build a scalable contract management function capable of supporting the business' continued growth.

"One of the huge benefits is the intake form and its configurable questions.

Through this process, we're able to capture which vendors use AI functionality at front. We now have this information at our fingertips, and it's easy for us to find and report on whenever there are questions around AI governance and use."



Trish Littrell
Legal Affairs