

Case Study

4062% ROI in 0.3 months

Company

Matillion

Location

Global

Industry

Software

Size

Mid-size



AI GENERATED

Objective

Matillion emerged in Manchester in 2011, with the goal to revolutionize 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 Microsoft Word, Slack and Salesforce.

“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

“In legal, we don’t purchase a ton of software. But when we do, we need it to work. Summize made the AI integration so simple that we had no pushback from our team. Everyone was excited because it’s a tool that helps us move faster, not something that complicates our jobs.”



Kimberly Trull,
Head of Legal

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 organization to find a tool that also met their needs.

The Outcome

Matillion successfully implemented Summize in 6-8 weeks with weekly design meetings and user acceptance testing, creating such enthusiasm that employees were “begging to be part of the pilot”.

The implementation of Summize empowered the Matillion sales teams (100 global reps) with self-service capabilities, reduced legal team dependencies, and integrated AI for contract summarization and risk profiling.

After adopting Summize as its contract lifecycle management platform, Matillion saw a 4,062% return on investment, with the system paying for itself in under two weeks (a 0.3-month payback period). The impact showed up across teams: sales reps got back roughly ten hours a week thanks to automated document generation and faster contract turnaround, while legal team members reclaimed about five hours weekly through better data visibility and AI-assisted document review.

Moving to Summize’s platform meant Matillion could retire manual, spreadsheet-and-email-driven contract workflows in favor of a single system where anyone could see contract status at a glance.

Sales gained the ability to self-serve on routine contract needs instead of routing everything through legal, which in turn freed legal to focus on higher-value work rather than answering status queries. AI features handling contract summarization and risk flagging added another layer of speed to the process.

Paired with native integrations into Salesforce, Slack, and Gmail, the result was a contract operation built to scale – shorter deal cycles, less friction between departments, and a workflow that fit into the tools teams were already using day to day.

“Summize helps make our legal approvals seamless, leading to faster revenue generation and growth. We feel well taken care of as a customer, and we’re excited to see where this partnership will take us.”



Kimberly Trull,
Head of Legal