

The **AI contracting layer** that powers the business

with embedded knowledge in the tools where work happens

As a Contract Lifecycle Management (CLM) solution, Summize is the AI contracting layer that powers the business with embedded knowledge in the tools where work happens.

At its core is the contract operations layer, which manages the full lifecycle - intake, generation, review, collaboration, and storage - all in one connected journey. Built on top is the agentic activation layer,

which transforms contract data into actionable business intelligence.

By embedding directly into Outlook, Teams, Slack, Gmail, Salesforce and HubSpot, Summize meets teams where they already work, driving adoption across the business while giving legal teams the control, structure and efficiency they need.



"Summize has quickly become an indispensable tool for our legal and operations teams. Highly recommended for any business seeking to modernize and simplify their contract lifecycle management."



The **Summize** difference



Seamless integrations. With the tools your business already knows and loves, such as Outlook, Teams, Slack and Salesforce. Our approach makes it easier for everyone in the business to adopt and use CLM software.



Enhanced compliance. Our AI strengthens compliance by eliminating missed obligations, reducing contract chaos, and minimizing surprises. It flags red flags in seconds and alerts you to any issues and key deadlines ahead of time.



Expert implementation. Summize customers see value in as little as four weeks thanks to our sprint-based implementation. We prioritize your key contract use case and drive implementation, training, and adoption within one month.



Standout support. Our team excels at the hard things: fast onboarding, standout support, and an evolving CLM shaped by your priorities. We partner with you long-term to ensure lasting value.

Sync your teams across the contract lifecycle

Request

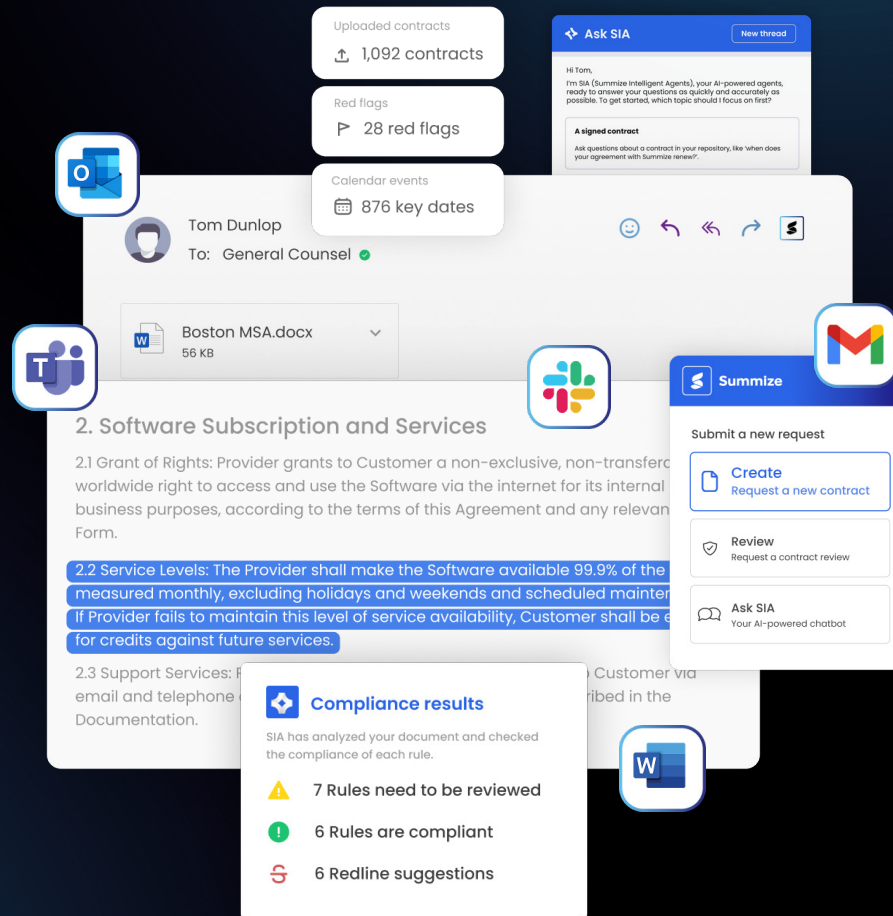
Centralize requests and enable self-serve contract creation directly within the tools your team already uses, such as Outlook, HubSpot, Slack, Teams, Gmail, and Salesforce.

"Summize is a cutting-edge CLM solution that has ticked every box and, delivering everything we were looking for in a contract management platform."



Repository

After signing, contracts are automatically stored in your Summize repository. Use smart search to find key information, while automated data extraction helps you keep up with renewals.



Uploaded contracts
1,092 contracts

Red flags
28 red flags

Calendar events
876 key dates

Ask SIA
New thread

Hi Tom,
I'm SIA (Summize Intelligent Agents), your AI-powered agents, ready to answer your questions as quickly and accurately as possible. To get started, which topic should I focus on first?

A signed contract
Ask questions about a contract in your repository, like when does your agreement with Summize renew?

Tom Dunlop
To: General Counsel

Boston MSA.docx
56 KB

2. Software Subscription and Services

2.1 Grant of Rights: Provider grants to Customer a non-exclusive, non-transferable worldwide right to access and use the Software via the internet for its internal business purposes, according to the terms of this Agreement and any relevant Form.

2.2 Service Levels: The Provider shall make the Software available 99.9% of the time measured monthly, excluding holidays and weekends and scheduled maintenance. If Provider fails to maintain this level of service availability, Customer shall be eligible for credits against future services.

2.3 Support Services: Customer via email and telephone. Documentation.

Compliance results
SIA has analyzed your document and checked the compliance of each rule.

- 7 Rules need to be reviewed
- 6 Rules are compliant
- 6 Redline suggestions

Submit a new request

- Create
Request a new contract
- Review
Request a contract review
- Ask SIA
Your AI-powered chatbot

Review

Review your contracts up to 85% faster! Directly in Microsoft Word, our AI uses your legal standards to analyze, redline, and redraft your contracts, with a full explanation and guidance at every step.

"Summize significantly reduced the time spent manually combing through clauses, highlighting risks, and ensuring compliance."



Analytics

Using our AI-powered analytics, uncover trends, mitigate risk, and make data-driven decisions. Smart dashboards help you build reports, spot red flags, and prevent unwanted renewals.

Summize in an **AI world**

SIA (Summize Intelligent Agents) is Summize's agentic experience, created by our legal experts and powered by AI to enhance how your entire business manages your contracts.

- ◆ Your on-hand AI legal assistant, ready to consult and act
- ◆ Answering your business' contract and workflow questions
- ◆ Build your own custom agents, trained on a defined knowledge bank
- ◆ Train your agents on non-legal matters such as policies and regulations

Summize in numbers

Hear from your peers and learn from the stats about how Summize's CLM software is transforming contracting processes for all types of businesses.

- 2** minutes is all it takes for **Huel** to report on contracts
- 3** weeks is all it took for **Asset Reality** to implement Summize
- 4** months is the new deal cycle for **Thought Machine**, down from 8
- 25** contract reviews per week, up from 4, for **Day Wireless Systems**
- 30** minute reviews replace 4 day tasks for **Castlerock Asset Management**

Summize in a **secure environment**

With great technology comes great responsibility. This is why we're committed to ensuring we leverage AI technology while upholding the highest standards of security and data protection for your business.

- 🔒 Our customers' prompts, completions, embeddings and training data are only available exclusively to each customer. Customer AI data is not available to other customers, OpenAI or used to improve OpenAI models.
- 🔒 We regularly update our AI capabilities to leverage the latest advancements while maintaining strict security standards.
- 🔒 We proactively seek, and incorporate, customer feedback to improve both the functionality and security of our AI features.
- 🔒 ISO 27001 accredited. Businesses, like Summize, can only achieve ISO 27001 through a rigorous accreditation process.

Ready to experience **Summize?**

Contact us today to arrange a personalized demo.
[Summize.com/book-a-demo](https://summize.com/book-a-demo)