



**Summize**

# How to build a CLM business case

Your complete guide to help you build a successful business case for Contract Lifecycle Management (CLM) software.

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**The Contract Lifecycle Management (CLM) market is crowded with vendors all claiming to be “best in class” or “most advanced.” But before comparing solutions, many organizations face a more fundamental challenge: how to build a compelling business case for CLM that resonates with the wider business.**

Securing buy-in for a CLM requires more than feature lists and vendor rankings. You need to clearly articulate the business problems you're solving, the risks you're reducing, and the measurable value a CLM solution can deliver not only for your legal team, but the entire business.

Whether you're developing your first CLM proposal or refining an existing one, this guide will help you lay the groundwork for success. It walks you through how to define your challenges, how to determine your project's ROI and ultimately how to gain stakeholder buy-in and budget.

# The contract inefficiencies your business can't ignore

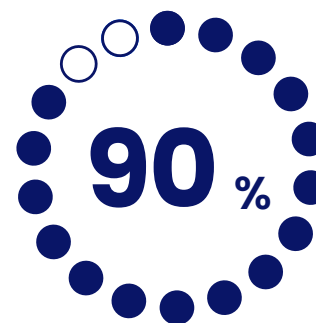
**From employment contracts to supplier agreements and NDAs, any in-house legal team knows contracts sit at the heart of every business. Used daily to define relationships with employees, suppliers, and stakeholders, they help minimize legal and financial risk and can even be used to strategically increase revenue.**

Yet despite their importance, the processes surrounding contracts are often chaotic, time-consuming, and frustrating for the whole business. But it doesn't have to be this way.

If you told your stakeholders that 11% of revenue generation has been lost or delayed in the past 12 months due to inefficient legal processes, do you think they would want change?

And if 90% of in-house legal professionals rate their contracts as moderately or highly complex, yet they lack the tools to manage the complexity efficiently, wouldn't your business believe this is worth an efficient solution?

This is where a Contract Lifecycle Management tool comes into play.



**of in-house legal professionals rate their contracts as moderately or highly complex yet they lack the tools to handle this complexity efficiently.**



**of revenue generation has been lost or delayed in the past 12 months due to inefficient legal processes.**



**“Contracts and regulations are only becoming more complexed, therefore it’s vital for any growing business to have a CLM in place. I know first hand how a CLM accelerates deal cycles, helps legal teams proactively spot risks, and overall enables the whole business to drive additional revenue from better contract processes and the ability to spot trends and growth.”**



**Olly Atkin**

Head of Enterprise Sales  
at Summize

# Why CLM can't wait

**Businesses of all types are benefiting from CLM software. Manual contract management is no longer sufficient for legal teams and organizations looking to modernize and scale. That's why CLM solutions exist: to streamline contracting and create a future-proof, strategic approach for managing your contracts.**

Getting your business aligned with this shift can take a few steps. Legal teams don't always own budget or technology decisions, so some internal groundwork may be needed, but that's where this guide can help.

Contracts touch every part of the organization, from sales and procurement to finance and HR. They're not just a legal resource, but a business-wide resource. For that reason, CLM should be viewed as a business tool, not a legal solution.

**By implementing a CLM solution, the Digital World Class Matrix™ report revealed these companies can achieve 45% in operational efficiency gains in the negotiation and supplier contract creation process.**



# What to include in your business case

Before you go to your stakeholders with a CLM proposal, you need to lay the groundwork so that you have a strong business case, which they ultimately can't say no to. Take a look at the following steps to know what to include.

## 1. Understand your pain points →

This may sound obvious, but many businesses look for a CLM before fully understanding what they want to achieve. Identifying your business' (not just legal's) pain points will help you define your needs.

## 2. Identify your key teams →

A CLM is not just a tool for legal, but the whole business, therefore it's vital to get buy-in from your non-legal teams early on! Understand their pains and create CLM advocates at the start of your business case.

## 3. Demo potential CLMs ↓

Now you have your key teams and their challenges identified, start demoing potential solutions. Find out about functionality, budget, timelines, roadmaps and security.

## 6. Secure stakeholders & budget

Once you've covered and detailed the previous five steps, you're ready to present your business case to your stakeholders to secure their buy-in and budget.

## 5. Lay out a project plan ←

It's vital to understand each step and the timeline of your CLM journey. Stakeholders will expect a quick return on investment, so having clear timings and a plan is essential.

## 4. Establish your ROI ←

Vendors may help you estimate your ROI by comparing your existing contract processes versus what good could look like with the right CLM solution in place.

# What is a CLM?

**To begin with, get back to basics with your stakeholders so that they fully understand what a CLM is, and the difference between a CLM and point tools on the market.**

Contract Lifecycle Management, or CLM, is a tool that manages every stage of a contract, from creation and negotiation through to storage and ongoing analysis.

For business teams, leading CLM solutions enable self-serve contract generation, clarity around legal jargon and data, plus transparent contract workflows and progress. All of which speeds-up contract-cycles and reduces legal bottlenecks.

For legal teams, a CLM creates clarity and structure. It automates processes, reduces manual tasks, provides an end-to-end lifecycle audit trail, and improves accuracy and compliance. Plus, with the right solution, you can proactively identify risks and even spot opportunities for business growth.

With such benefits across the whole business, it's clear to see how a CLM is not just a legal tool, but a future-proof contracting tool for the entire organization.

## The difference between CLM and point tool solutions

	CLM tools	Point tools
Scope	Manages the full lifecycle of a contract, from creation to post-signature analysis.	Focuses on a specific task, such as contract review.
Functionality	Includes broad functionality across stages and uses AI throughout.	Can offer efficiency and accuracy, but only at one stage of the lifecycle.
Implementation	Depending on the CLM provider, you can be up and running in just 4 weeks!	Typically plug & play tools as they don't take into account all your legal guardrails.
Best for	Businesses transforming contract processes into efficient, track-able, and compliant workflows.	For businesses looking for a quick, one time solution.

# Identify your problems

Stakeholders are most persuaded by seeing how a CLM solves real business problems. Do any of the following problems resonate with both your legal team and the rest of the organization?

AI-powered CLM can accelerate the contract lifecycle by **50%**



## 1. Contract requests coming from everywhere

Do contracts come to you from every direction – emails, Teams messages, or ad-hoc conversations? A chaotic intake process makes it difficult to triage, prioritize and deliver a fast turnaround, meaning legal teams are forced into reactive mode. A CLM centralizes intake and creates structure, visibility, and control over incoming work.

## 3. Slow, manual legal processes

Do manual steps, email approvals, and chaotic version control make your deal cycles longer than necessary? Inefficient processes can drain time and also increase risk. By streamlining your workflows using a CLM tool, you can easily remove friction and help the whole business deliver faster outcomes with less effort.

## 2. Too many routine legal requests

Are you fielding the same questions and standard requests over and over? These interruptions slow your team down and can frustrate the business. By empowering your non-legal teams to self-serve routine contract requests and questions, your future CLM can help everyone move quicker, while keeping legal oversight firmly in place.

## 4. No clear source of contract truth

Have you ever struggled to quickly find the right contract, clause, or obligation when the business needs an answer now? Chaotic storage makes even simple questions hard to answer. A CLM provides a single source of truth for all your contracts, with clear summaries and an audit trail to give legal and the business confidence in every decision.

# Getting your teams onboard

**It will be easier to convince your stakeholders if you have multiple teams onboard. Get them on your side by resonating with their pain points and highlight how your future CLM will benefit them too.**



## Finance

Finance can help you determine your CLM's ROI versus the cost of doing nothing. Their early involvement can also help demonstrate how a CLM improves cost control, compliance, and financial visibility. Plus, take a look at the CLM benefits for their team:

- ✓ A central repository to track spend, obligations, and renewals
- ✓ Raises red flags on non-compliant payment terms
- ✓ Enables better ROI analysis through structured, searchable data



## Sales

Sales teams are high-volume contract users, making them critical stakeholders and strong internal champions for your business case. The right CLM will accelerate contracting and directly impact revenue and deal velocity, plus the following benefits:

- ✓ Reduces contract turnaround time, helping close deals faster
- ✓ Integrates with existing sales tools to streamline workflows
- ✓ Minimizes lost opportunities caused by contracting inefficiencies



**“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, with Summize, 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 at Edpuzzle

# Getting your teams onboard

 **Procurement**

Procurement plays a big role as a heavy contract user and the team responsible for vendor negotiations. Including them early on ensures smoother processes and better commercial outcomes. Explore some of the many CLM benefits for their team:

- ✓ Automates reviews, approvals, and reminders to reduce delays
- ✓ Improves visibility into supplier terms, renewals, and compliance
- ✓ Strengthens vendor negotiations through standardized data

 **HR**

HR is a key stakeholder as they manage employee, contractor, and policy-related agreements that require accuracy and consistency. A CLM supports HR by reducing risk and improving contract governance. Here are some more benefits:

- ✓ Centralizes employment and contractor agreements
- ✓ Ensures compliance with policies, regulations, and renewals
- ✓ Reduces manual effort and errors in on/offboarding contracts



**“We have been working with Summize for three and a half years, and we love the tool. It’s simple and easy to use, and the team has been so helpful and dedicated to improving our processes.”**



**Colin Bell**

Director of Procurement  
at Gamma

# Time to start demoing

With the right teams onboard, begin demos to assess which CLM solutions fit your business and budget. Consider the following six factors, and include your non-legal teams in the process too.

## 1. Functionality



Focus on your business' biggest use case and judge which CLM vendor's functionality can solve your challenges.

## 2. Vendor qualities



Outside of functionality it's vital to understand a vendor's post-go live support, their future roadmap, their existing customers and successes.

## 3. Implementation plan



How long will the implementation be? You don't want a year long plan, you want to be able to use your CLM as soon as possible.

## 6. Security



Security is paramount! Most CLMs use AI but how do you know your data is safe? Ask about their security processes and data privacy.

## 5. ROI and success



A leading CLM provider will help you define your ROI, your goals, and how to ensure long-term success – all vital for stakeholder buy-in.

## 4. Budget



Get an idea of the implementation fee, yearly costs, additional add-ons, as well as understanding license types, storage and usage caps.

# More resources to help your buying journey

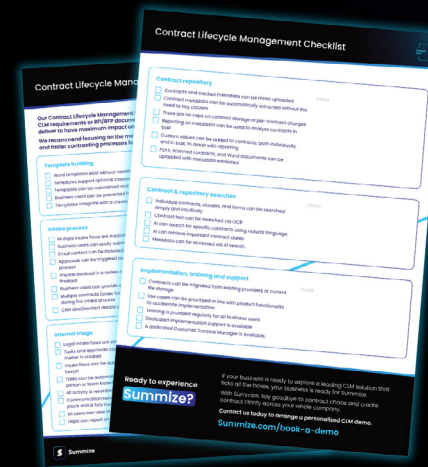
There are many CLM vendors on the market, and it can be difficult to know where to start searching. We've put together a Buyer's Guide to CLM and a detailed CLM Functionality Checklist to help you make a more informed business decision.

Download both the guide and checklist to make sure you have everything covered in your buying journey so that you have a even stronger business case.



## Buyer's Guide To CLM

[Download >](#)



## CLM Functionality Checklist

[Download >](#)

# Building your ROI model

## Determine where gains can be made

**Stakeholders are most interested in the return on investment: how will a CLM positively affect the business; how it will impact the bottom line, and when will the company see a positive return?**

So that you're fully prepared when you present your business case, build a ROI model to determine how much a CLM could benefit your business.

When calculating your ROI, consider factors such as:

- \$ Cost savings from saved time
- \$ Increased revenue from faster deal closures
- \$ Faster contract cycles from automating workflows and reviews
- \$ Financial risk reduction from ensuring better contract compliance
- \$ Money saved from avoiding unwanted contract renewals

During your CLM demos, ask the vendors to help you estimate your ROI, as many will most likely have a ROI calculator to help you out.

Take a look at our estimates on the next page as a starting point.

**57%** of sales professionals reported that inefficiencies in their contracting process resulted in a delayed path to revenue.



# Building your ROI model

## Estimate your time efficiencies

Start with your contract generation and review processes. Identify how much time you spend on each task and compare how long the task would take with a leading CLM solution.

With Summize's AI-powered CLM:

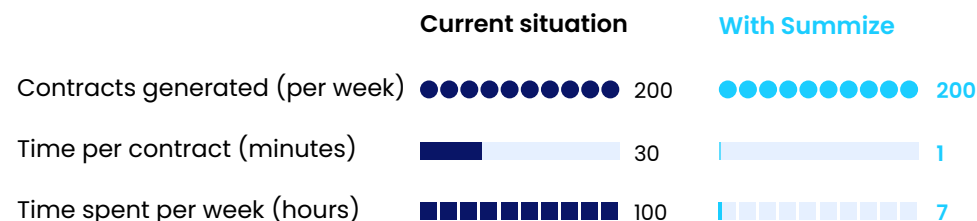
- Generating a contract can take **as little as 2 minutes**, compared to 30 minutes without a CLM
- Reviewing and redlining a contract is **85% quicker** than compared to manual reviews

Using this data, you can build a compelling forecast of the time savings and increased legal output achievable with a CLM.

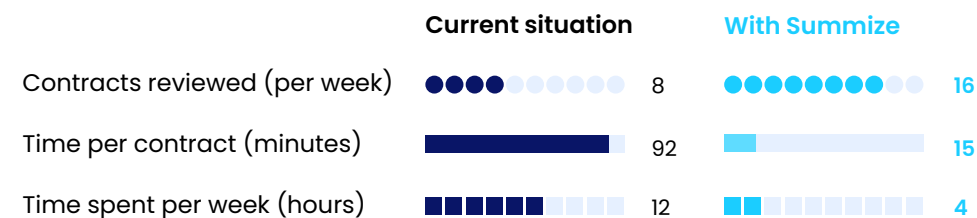
**"With Summize we've managed to close deals about 40% faster, and we've shaved the deal length down to 4 months from 8 months. So, the business is loving us right now!"**



### Generating contracts



### Reviewing contracts



# Laying out your project plan

**Your penultimate step is to develop a project timeline and plan. It is vital that you detail every step of the project, who will be involved, and how much time each step takes. This will help you be even more prepared for any stakeholder push-backs or questions.**

Create a checklist of key actions your legal team, and perhaps other areas of the business, need to complete before your project can begin. Actions such as cleaning up your legacy data, preparing your templates, and allowing time to promote and train your business are all vital steps.

Leading CLM providers may help you with the preparation work, but the tasks will still require focus and time from your team.

An example of how you can create a checklist of important actionable items.

Action	Description	Timeline	Owner
<b>Technical approval</b>	Technical session on security and integrations		
<b>Budget approval</b>	Business case submitted		
<b>Terms &amp; conditions</b>	Finalized order form to be signed by both parties		
<b>Project design call</b>	Internal call to detail your implementation project		
<b>Project kick-off call</b>	Introduction of delivery team and project plan defined		
<b>Implementation</b>	Starting your implementation		
<b>Target go-live</b>	Internal launch		

# Getting stakeholder buy-in

So you're now ready to approach your stakeholders with your CLM business case. As a starting point, prepare the following assets for your stakeholder meetings:

- Business' main use case and existing challenges
- Your key teams and champions
- Your proposed CLM solution
- Full budget breakdown
- ROI model, or what success looks like
- Project plan and timelines

Overall, it's vital to present your future CLM as a solution to your business' problem. Approach each stakeholder with your champions from various teams and keep each stakeholder's interests in mind when pitching your case. Ensure to tailor your argument so that you're providing them with the information they care most about. If you follow these steps, you're on the path to a successful business case!



In over 70% of organizations, the primary obstacle to investment is an inability to engage and build consensus across stakeholders.

Stakeholder	Benefits they expect
<b>CEO</b>	Improve risk management, digitalize the business, increase revenue and enable growth.
<b>CFO</b>	Improve financial forecasting, greater visibility into company revenue and spend, automatic extraction of key dates, central repository for contracts, mitigate risk.
<b>General counsel</b>	Impact on everyday responsibilities, fewer manual tasks to focus on strategic initiatives, prove profitable cost center, and become more valuable business partner.
<b>Sales leader</b>	Shorter contract cycles, faster revenue, easy self-service, mitigated risk, improved contract visibility, enhanced compliance.
<b>Procurement teams</b>	Standardized contracts, shorter contract cycles, central repository, accurate contractual data, accelerate third party contracts, improved compliance.

# Building your business case with Summize



by Summize's Co-Founder &  
CEO Tom Dunlop

**As a former General Counsel, I know how legal teams often don't have the budget or experience when it comes to buying new tech. This is why it's vital to build a business case, to show how your role and your expertise can be taken to another level when you have a CLM to take care of the manual, low-risk contracting tasks.**

At Summize, we not only show legal professionals and their business the power of our AI-driven CLM, we also help many organizations put together their business case, as we believe in a true vendor and business partnership from the very start of your CLM journey.

Firstly, get to know more about Summize, our business-wide approach to contract lifecycle management and how with us, you can really eliminate contract chaos, and create clarity across your contract lifecycle for the ENTIRE company.

# How we'll help you build your business case

## With our contract specialists



Our contract specialists work with all types of businesses, to demonstrate the real value a CLM can deliver. But first, we'll listen to you. We take the time to understand your challenges and pain points, then work in partnership with you to define what successful contracting looks like for your organization.

## Transparent pricing and licenses



You won't find hidden prices with Summize! We provide transparent pricing and easy to understand license types for your different users.

## Implementation experts

Nobody wants a long implementation project. This is why the average Summize customer sees value in just 4 weeks! We'll show you what this plan can look like, and how a short, efficient but successful implementation plan can work in your business case's favor.



## Use our ROI calculator



Our ROI calculator can help many businesses understand just how much time and budget they will save when they use Summize's CLM. Talk to our contract specialists who will show you how the calculations work for your business, and simply present the findings back to your stakeholders.

## Compare



Do you need more visual proof for your stakeholders? We have use cases, videos, and articles that prove the vast difference between manual contract processes versus using a leading CLM.

## Referrals



Hearing from your peers goes a long way! Just ask us for a referral, success story or testimonial, for an even stronger business case.

## Success story: Nucleus Research ROI winner 2025

# Matillion achieves over 4000% ROI with Summize

Global tech company Matillion, and Summize, have been named the Nucleus Research ROI Award Winner for 2025 for their staggering 4062% return on investment after implementing Summize's CLM solution.

Nucleus Research analyzed the costs of software licensing, personnel, and professional services over a three-year period to quantify the organization's total investment in Summize. Take a look at the incredible results and how Matillion's journey with Summize first began.

### Objective

As Matillion scaled globally, the legal team struggled with its initial CLM tool that was clunky and hard to use. The team needed a collaborative, Salesforce, Word and Slack integrated solution that supported self-serve for over 100 sales reps, without pulling the legal team into every step.

### Solution

After evaluating 10+ providers, Matillion chose Summize for our intuitive interface, AI functionality and strong partnership. Our CLM embedded workflows within existing tools now empowers sales to manage contracts, while legal is able to maintain visibility and control.

### Outcome

Matillion now has faster turnaround times, better legal visibility and improved collaboration between teams. AI frees up the legal team for more strategic work and the seamless integrations help drive adoption and efficiency, and have ultimately led to a 4062% ROI.

### The main success stats

- ✓ **Legal saves 30 minutes daily** by eliminating repeat contract questions with clearer agreement visibility
- ✓ **Sales reps save 5 hours a week** through automated contract syncing and status tracking in Salesforce
- ✓ **AI tools save legal 30 minutes per document** on summarization, NDA drafting, and redlining across five documents weekly
- ✓ **Real-time workflow transparency saves 5 hours a week** across sales and legal

# Creating contract clarity

## Learn more about Summize's CLM

### Request

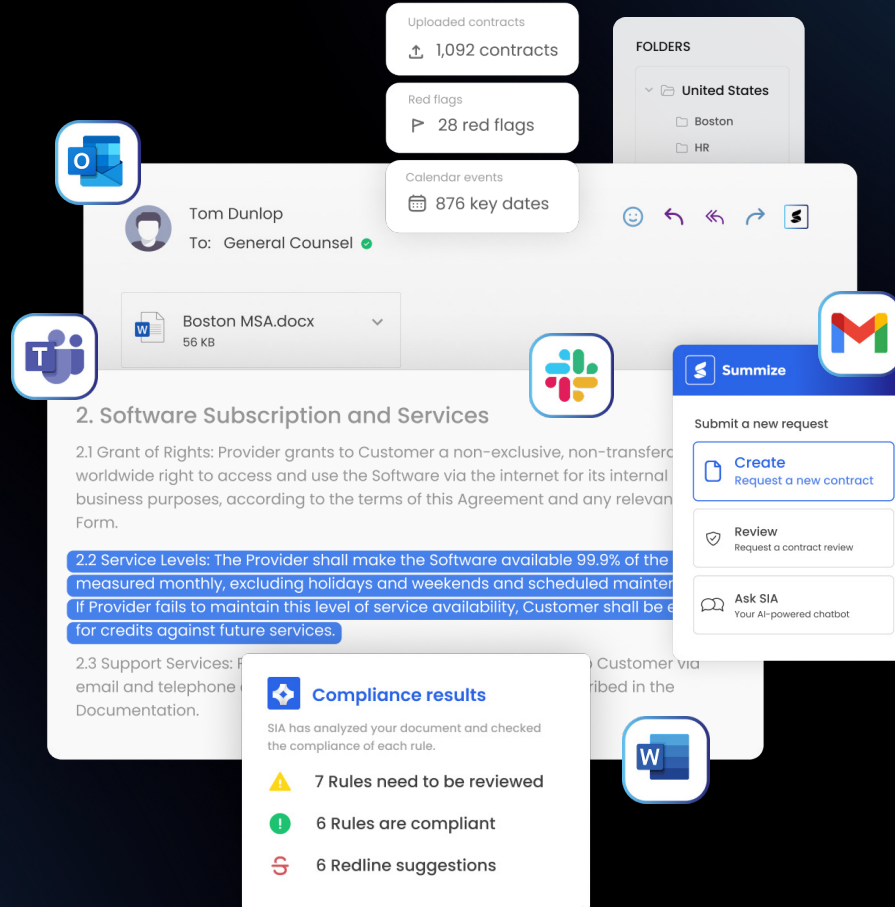
Centralize requests and enable self-serve contract creation directly within the tools your team already uses such as Outlook, HubSpot, Slack, Teams, Gmail, and Salesforce.

*"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

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 entitled to credits against future services.

2.3 Support Services: Provider shall provide Customer with email and telephone support as described in the 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.

# Learn about the Summize difference

## Seamless integrations

We integrates with the tools your business already knows and loves, such as Outlook, Teams, Slack and Salesforce. Our approach creates ease of use and maximizes CLM adoption across your business.

## Enhanced compliance

Our powerful AI eliminates forgotten obligations, reduces contract chaos and creates fewer surprises. We help you identify red flags, and automatically alert you of key deadlines ahead of time.

## Expert implementation

The average Summize customer sees value in as little as four weeks thanks to our sprint-based approach to implementation. We prioritize your main use case to ensure you see value fast.

## Standout support

Our team is known for doing the hard things right: fast onboarding and standout support. We work alongside you as a long-term partner throughout your journey, ensuring you achieve ongoing value.



“Summize was designed to suit the way actual corporate contract negotiations are handled. First you draft the contract, then you send it do the other side to redline, then you upload it for internal review/ negotiation. Other CLM systems are not designed with practicality in mind.”

ELL:PSES  
PHARMA



“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.”

 Calvary Robotics  
ADVANCING AUTOMATION



# Ready to experience Summize?

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

