



Case Study

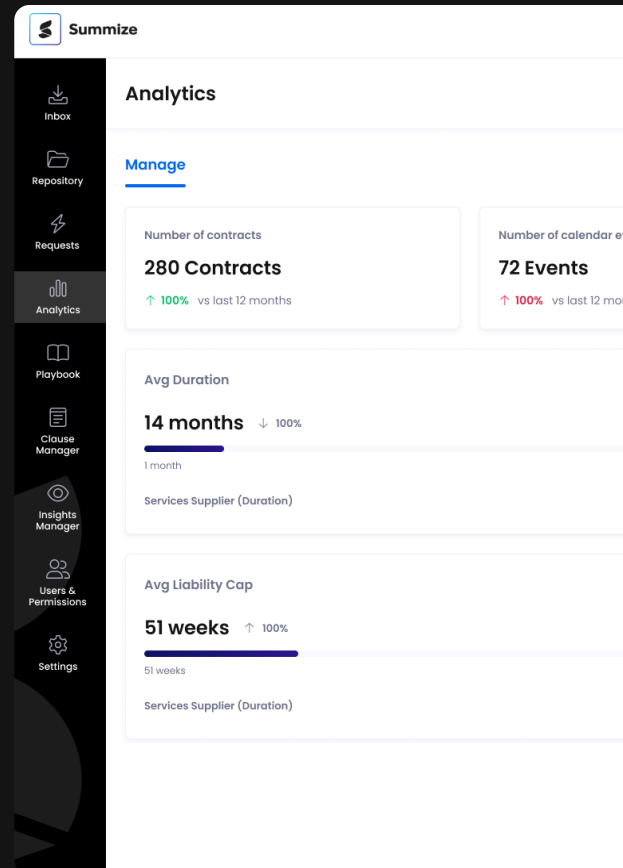
# Leveraging Legal Tech for Customer Success Teams

Company  
**AppLearn**

Location  
**Global**

Industry  
**Technology**

Size  
**70+**



## Objective

AppLearn is a pioneering digital adoption company that allows global organisations to achieve digital transformation and measure the impact of software apps. Operating in over 100 countries, AppLearn have made it their mission to bring certainty to enterprise software investments.

Ranked in the Top 100 list of the UK's high-growth businesses in 2019, the primary challenge for AppLearn was to improve cross-functional collaboration on their contracts during a period of business growth. The challenge for their Customer Success team was their existing contract management process.



*We use Summize to build a complete picture of risks and benefits within the entire contract.*

**Joanna Luke, Legal & Compliance Director**

The primary issue for the Customer Success team was that they previously manually performed due diligence reviews and tracked key contractual information such as break clauses, noticed periods, and termination dates. Due to the team not having legal knowledge, they wanted a contract management solution that was easy to use and improve visibility into their contract portfolio.

The nature of their existing process meant that AppLearn faced significant business risk, complication, and financial losses if not performed correctly. AppLearn set out to adopt a contract lifecycle management solution that empowered their business users.

# Key Outcomes

## Instant Extraction

of key calendar dates and contract summaries

## Improved Visibility

across the contract portfolio

## Increased collaboration

between legal teams and business stakeholders



*The contract summaries means we have a deeper understanding of all of our contracts.*

**Katy Batley, Head of Customer Success**

## Solution

To digitalise their contract lifecycle, we helped AppLearn to accelerate their contract lifecycle. By implementing Summize, AppLearn can highlight and minimise risk across all their contracts, with the instant extraction of key calendar dates and the utilisation of the calendar countdown feature.

The Contract Analysis Engine has further added value for AppLearn. With accurate contract summaries with contextual insights regardless of contract type, the Customer Success team can perform regular due diligence reviews across their portfolio of contacts.

## The Outcome

By digitalising their contract lifecycle with Summize, AppLearn can empower their Customer Success team to self-serve on contractual tasks. With instant and accurate summaries with contextual insights, the Contract Analysis Engine highlights risks across their contracts improving visibility and allowing AppLearn to perform due-diligence reviews across their contract portfolio.

Summize has allowed AppLearn to minimise the financial and operational risk across their contract portfolio. Key dates are automatically extracted and added to the calendar, with built-in email reminders meaning the team will never miss a key date again.



*Summize has accelerated our contract lifecycles whilst highlighting and reducing risk.*

**Katy Batley, Head of Customer Success**



**Summize**

**Summize.com**