

Case Study



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Bolton & Menk Builds a CLM Operation from the Ground Up with IntelAgree & Elevate

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- Abby Pettit, General Counsel, Bolton & Menk

Company

Bolton & Menk is an employee-owned engineering, design, and planning firm founded in 1949 in Minnesota. Now headquartered in Mankato, the firm has grown to more than 900 employees, with offices across Minnesota, Iowa, North Dakota, Colorado, and the Carolinas. Bolton & Menk provides civil and municipal engineering, surveying, landscape architecture, and planning services to communities and private clients.

Overview

Building a contract management operation from scratch is a significant undertaking for any organization. The stakes are even higher when the effort falls to a single general counsel managing legal for a growing firm spanning six states.

That was the position Abby Pettit, General Counsel at Bolton & Menk, found herself in. Bolton & Menk had grown steadily for more than 76 years, but its contract processes still ran on an honor system — employee-driven, lightly enforced, with agreements scattered across thousands of project files. Pettit knew the firm needed a CLM platform, but she also knew she could not build it alone. She selected

Key Results

- Built 16 standardized smart templates, consolidating state-specific contract versions into streamlined forms
- On-time, partner-led implementation completed in roughly three and a half months
- Nearly 500 users registered with about 250 contracts in a centralized, searchable repository

IntelAgree, who brought on implementation partner Elevate to handle the heavy lift.

Elevate took the firm's state-specific contract versions, consolidated them into standardized smart forms, and ultimately delivered 16 full templates. The team built the approval workflows and delivered an on-time go-live in roughly three and a half months. Today, nearly 500 users are registered on the platform, with about 250 contracts in a searchable central repository.

Challenges

- Employee-driven processes with inconsistent legal review and lack of enforced approvals
- Contracts buried across project files, making master agreements difficult to locate
- No CLM foundation, requiring a full build from the ground up

Solution

Building Confidence Through a Partner-Led Implementation

Pettit knew from the start that standing up a CLM platform as a one-person legal team would require outside help. Bolton & Menk had no CLM history — no prior system and no existing workflows to migrate. She selected IntelAgree, who brought on Elevate as an implementation partner to handle the build.

Elevate ran the project with weekly check-ins, clear milestone tracking, and a shared team site for deliverables. They took Bolton & Menk's state-specific contract versions, consolidated them into standardized templates, tagged every attribute, and built the smart forms, ultimately delivering 16 full templates. Pettit's team focused on the decisions — naming conventions, approval paths, what information to collect — and then reviewed and tested what Elevate produced. When decisions were unclear, Elevate helped guide the process by explaining the downstream impact of each choice.

"As long as we were doing our tasks, which were very clearly communicated to us, they hit all the milestones they needed to hit and we went live as planned," Pettit said.

The implementation kicked off in late August and went live in mid-December — a roughly three-and-a-half-month window that Pettit credits largely to front-loading the process work. She had mapped Bolton & Menk's approval workflows and diagrammed the contracting process during the sales cycle, so when implementation began, the team already had answers to most of Elevate's foundational questions. For the final round of testing, Elevate sent a team member on-site to sit alongside Bolton & Menk's power users and troubleshoot in real time. The on-site team member reviewed screens over users' shoulders while Elevate's development team joined via Microsoft Teams, allowing the group to address issues as they surfaced.

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Bringing Consistency to Contracting Across Multiple States

Before IntelAgree, Bolton & Menk's contract process depended on individual employees to follow the rules. Templates were available on the company intranet, but a wide variety of clients required their own terms, and legal review before execution was inconsistent at best. For a firm hiring two to three hundred employees a year, that inconsistency was harder to manage with each passing year.

"It was hit or miss whether I reviewed or if some review was happening outside of the project manager for contracts," Pettit explained. "Compliance was really employee-driven. It was kind of an honor code system."

Bolton & Menk is a Microsoft 365 shop, so platform compatibility was a key factor in the selection process. IntelAgree's Microsoft integrations, intuitive interface, and ability to work natively with existing file formats made it accessible for users across a wide range of roles and contract experience levels.

Now, IntelAgree's smart forms and contract wizard generate agreements from standardized templates, meaning administrative staff answer a set of questions and receive a completed draft without manually editing Word documents. The approval workflows enforce the same path for every contract, regardless of which office or state it originates from. Plus, the platform is fully self-service – Pettit's team can add workflows, adjust smart forms, and maintain templates without submitting support tickets or spending additional resources. For Pettit, the shift means she can scale her review capacity without adding headcount.

"Removing some of the decision-making requirements from the folks who are primarily charged with getting first drafts out the door has been really great for consistency.," Pettit said.

Ready to Accelerate your Contract Management?

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Every Agreement in One Place, Every Contract Relationship Connected

Before IntelAgree, finding a specific agreement at Bolton & Menk meant searching through thousands of project files organized by project, not by contract or party. Master service agreements (MSAs) were especially difficult to track down. Some practice groups had created their own storage solutions, but those were neither universal nor widely known across the firm.

IntelAgree gave the firm a single, searchable repository with relationship linking between agreements. Parent contracts are now connected to their task orders, and the system enforces that hierarchy so a task order cannot be created without a parent agreement attached. Roughly 250 contracts are already in the repository, with about 100 more in active process.

The visibility has been equally valuable for Pettit's own workflow. Rather than tracking contract reviews through her inbox, she can see everything that requires her attention in one place. IntelAgree's version comparison tool has also cut down review time when tracking changes across contract drafts. As Bolton & Menk continues to expand its use of IntelAgree with playbooks, additional templates, and broader adoption on the horizon, Pettit points to the relationship with IntelAgree's team as a reason for confidence.

"One of the reasons that we went with IntelAgree was the sense we got about IntelAgree's more personalized relationships with their customers," Pettit said. "And I would say, based on the responses I've gotten, I think that was a fair read."