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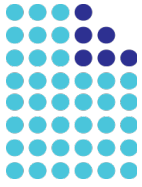
Diversified Holding Company Builds CLM Expertise with IntelAgree Workshops

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- Matthew A., Corporate Counsel

Company

A diversified holding company with operations spanning real estate, multifamily housing, commercial development, and land projects, this organization manages hundreds of vendor and partner agreements across its business units. With complex legal and operational needs, the company sought a solution that could bring visibility, structure, and scalability to contract management.

Overview

Managing contracts for a company that spans multiple service lines is no small feat. For Matthew A., Corporate Counsel at a diversified holding company, it meant overseeing agreements for everything from multifamily housing and commercial projects to land development — often without the structure or visibility needed to keep pace.

When he joined the company, there was no formal contract management system fully in place. Files lived across shared drives and inboxes, and finding historical contracts was tedious. "No one seemed to know where anything was — it could be paper, it could be digital, and if it was digital, it could be saved in a number of spots," Matthew said.

Key Results

- Ability to find contract details in five minutes or less using IntelAgree's centralized repository

- Completed more Learning & Optimization Workshops than any other IntelAgree client

- Created a scalable CLM foundation that supports the company's multi-entity contract structure

With IntelAgree, he's built a system that centralizes all agreements and provides the visibility his team once lacked. Through IntelAgree's Learning and Optimization Workshops, he continues to refine that foundation — introducing smarter workflows, uncovering process gaps, and building a more scalable approach to contract management across the organization.

Challenges

- Lack of centralization in contract storage and approval processes.

- Inconsistency in procedural adherence due to turnover and limited accountability.

- Absence of automation in tracking renewals and key contract terms.

Solution

Centralized, Searchable Repository Streamlines Contract Visibility

Before IntelAgree, tracking down historical documents could take hours, and version control was inconsistent. "Our company didn't really seem to have any sort of process when it comes to how contracts go through approvals, how they're executed, or how they're filed," said Matthew.

Now, Matthew manages every agreement with IntelAgree's centralized, searchable repository. Features like structured search and attribute tagging make it easy to track renewal dates, assignability, and notice provisions. "I can usually find what I need in five minutes or less," he said. "Having those details organized in one place has been a huge improvement for us."

This shift has reshaped how the company understands its business relationships. "We now have a decent understanding of who we're doing business with and what those terms are," Matthew said.

The result is a faster, more reliable process that gives teams clear insight into every vendor relationship and agreement term.

Hands-On Workshops Encourage System Mastery

For Matthew, IntelAgree's Learning and Optimization Workshops have turned early familiarity into deep platform mastery. Having completed more workshops than any other client, he used each session to uncover new efficiencies and fine-tune how he manages contracts. "It renewed my focus because I realized there were more efficient ways to manage my in-progress contracts," he said. "The workshops showed me how to make better use of the system."

Each session addressed real challenges in his day-to-day work — from troubleshooting renewal term workflows that weren't triggering correctly to clarifying how attribute types like date, text, and number impact automation. "Sometimes it's just super helpful to hear someone else say it or show you," Matthew said. "Seeing it applied directly on my system clicked better than watching the videos."

This hands-on support gave him a stronger command of the platform. "These recent workshops have really helped — now that I'm more than a year into it — kind of solidify the learnings," he said. With continuous education and collaboration, IntelAgree helped Matthew strengthen both his knowledge and his system's performance, paving the way for broader adoption across the organization.

Adaptable Platform Evolves With Business Needs

As his organization's contract needs evolved, Matthew relied on IntelAgree's flexibility to keep pace with its complex, multi-entity structure. "You can make it exactly what you need," he said. "And if it's not there yet, it likely will be. The IntelAgree team is always updating it and is good at taking feedback."

That responsiveness has turned feedback into tangible product improvements. Matthew has seen multiple feature requests become live updates — from automated renewal reminders built on custom formulas to enhancements that allow a single amendment to connect to multiple related contracts. Those changes, combined with IntelAgree's support, have helped him fine-tune the system to fit the way his business operates.

Reflecting on his experience, Matthew pointed to IntelAgree's balance of innovation and service. "IntelAgree has a great product, but it's the team behind it that makes the difference," he said. "Support is fast, feedback is taken seriously, and every update makes the platform stronger. I'm excited to see what comes next."

Ready to Accelerate your Contract Management?

Schedule a demo to learn more.
www.intelagree.com/demo