

SCALING PRODUCT INNOVATION WITHOUT OVER-SCALING THE TEAM

How ContractSafe and York IE accelerated feature delivery while strengthening revenue performance and development efficiency

SETTING THE STAGE

ContractSafe is a California-based, AI-powered contract lifecycle management (CLM) platform designed to make managing contracts from request to renewal simple and affordable for businesses of all sizes.

By bringing every stage of the contract lifecycle together in one place, from creation and e-signatures to centralized storage, automated date alerts and AI-powered search, ContractSafe delivers powerful contract management capabilities without the complexity of traditional enterprise systems.

As ContractSafe continued to grow, customer expectations and product demands increased alongside the business. The team had a strong roadmap and a clear vision for feature improvements that could deliver more value to customers, including lifecycle tracking, contract review workflows, and user interface (UI) improvements to the contract management experience. The challenge was execution: continuing to ship meaningful new features quickly while maintaining quality, controlling costs, and avoiding unnecessary headcount growth.

Operating as a portfolio company of Five Elms Capital, ContractSafe also needed to ensure that product investments were disciplined, aligned with long-term value creation goals, and executed predictably.

ENTER YORK IE

ContractSafe partnered with York IE to provide additional execution capacity across its R&D organization, without changing how the team worked or who owned the roadmap.

Rather than operating as a standalone development shop, York IE embedded directly into ContractSafe's existing product and engineering workflows. York IE engineers worked alongside internal teams on active initiatives, while York IE leadership stayed closely aligned with ContractSafe executives to ensure execution decisions reflected business priorities and customer needs.

The engagement focused on driving high-impact product features that were essential to ContractSafe's goal of becoming a full contract lifecycle management platform. York IE supported development across several key initiatives, including contract lifecycle tracking (CLT), contract review functionality, a new contract page experience, and a full rebuild of the contract page to improve usability and performance.

FAST FACTS

83% of product roadmap delivered – 23 of 28 features shipped on time and at quality. This is **13% above the industry average** for B2B SaaS companies (Statista).

Accelerated revenue momentum, including higher ACV and increased adoption of higher-tier plans

Expanded execution capacity without adding headcount, delaying full-time hires while accelerating delivery speed

With York IE supporting execution, ContractSafe was able to advance multiple initiatives in parallel without overloading internal engineers.

Just as importantly, the partnership created operational consistency. York IE brought proven delivery processes, clear ownership, and predictable execution – reducing friction and helping the team maintain momentum even as priorities evolved.

York IE integrated seamlessly with how we already operate. They helped us move important initiatives forward without adding complexity or distraction.



Randy Bishop

Co-Founder, President and Chairman, ContractSafe

THE RESULTS

With York IE embedded into its R&D workflows, ContractSafe accelerated product delivery while maintaining cost discipline and execution quality.

► Feature Delivery

ContractSafe set an ambitious goal to evolve its platform into a full contract lifecycle management solution within the year. Achieving that vision required shipping a large number of new capabilities on an aggressive timeline.

With York IE's support, the team successfully delivered 23 of 28 planned roadmap features – representing 83% of the roadmap delivered on time and at quality, well above the industry average of 73.7% for B2B SaaS companies ([Statista](#)).

► Revenue Momentum

The features released throughout the year strengthened the platform's value for customers and contributed directly to stronger sales performance.

Following the release of several key features in the back half of the year, ContractSafe experienced a notable uptick in sales activity. The team saw higher average contract values (ACV), a greater percentage of customers purchasing higher-tier plans, and stronger overall sales momentum as the expanded feature set increased the platform's value to both new and existing customers.

► Scalable R&D

Rather than expanding its full-time engineering team to meet roadmap demands, ContractSafe used York IE as an extension of its R&D organization. This approach allowed the team to delay several planned full-time hires, avoiding the time and resource investment required for recruiting and onboarding while staying focused on delivering the roadmap.

The result was greater execution capacity without adding permanent headcount or increasing operational complexity.

▶ Product Quality

Even with a rapid pace of product development, ContractSafe maintained a consistently high NPS score, demonstrating that new functionality was introduced without sacrificing product quality or customer experience.

York IE's deep integration into the product team allowed delivery velocity to increase while preserving the stability and usability customers expected from the platform.

Having additional execution support gave us confidence. We could keep moving without stretching the team too thin or taking on unnecessary risk.



Randy Bishop

Co-Founder, President and Chairman, ContractSafe



STRONG ALIGNMENT ACROSS MANAGEMENT AND INVESTORS

By working closely with both ContractSafe and Five Elms Capital, York IE helped ensure product execution stayed aligned with strategic priorities and long-term value creation goals.

The partnership gave the management team additional execution leverage while providing investors confidence that R&D investments were translating into measurable product progress and revenue momentum. The result was faster progress, clearer visibility, and reduced execution risk across key initiatives.



York IE understands how to operate in a PE-backed environment and supports disciplined execution that reflects the Five Elms value creation strategy.



Mike Welch

Director, Value Creation, Five Elms Capital

WHAT'S NEXT

As ContractSafe continues to evolve its platform, the company plans to build on this execution model to support future growth. The team has built deep trust through consistent execution and shared ownership of the roadmap, making it easy to augment resources when needed.

This model allows ContractSafe to scale product development easily as priorities evolve, while maintaining focus on delivering new capabilities that drive customer value, support higher-tier plan adoption, and strengthen the platform's position as a leading CLM solution.

By maintaining close alignment between ContractSafe leadership, York IE, and Five Elms, the teams have established a repeatable operating approach that supports sustained innovation while controlling cost and risk.