



This draft directory is produced by the Technology in M&A Subcommittee of the ABA's M&A Committee and is a work in progress. If you are aware of any additional technologies used in M&A that could be considered please contact Directory Project Leader Will Norton of SimplyAgree (will@simplyagree.net), Technology in M&A Subcommittee Chair David Rosenberg of Charles Russell Speechys LLP (david.rosenberg@crslaw.com) or Technology in M&A Subcommittee Vice Chair Thomas Romer of Greenberg Traurig LLP (romer@gtlaw.com).

Directory of M&A Technologies

Technology Name	Website	Category	Subcategory	Description	Configuration and Integrations
Firmex	https://www.firmex.com/	Diligence	Data room	Firmex describes itself as "a global provider of virtual data room and secure document sharing solutions."	Cloud - AICPA SOC 2, HIPAA, GDPR
(Thomson Reuters) HighQ	https://highq.com/en-us/solutions/virtual-data-rooms/	Diligence	Data room	HighQ offers to "optimise due diligence, visually report risk and deploy AI engines for document and contract reviews. Collaborate in secure deal rooms and exchange sensitive files and information securely in virtual data rooms."	Cloud or Hybrid - ISO 27001, ISO 22301, AICPA SOC 2 Type II, FIPS 140-2 Level 3, Cyber Essentials Plus, CSA STAR, HIPAA, GDPR, Integrations with Kira Systems, LEVERTON, Luminance, Neota Logic and RAVN
Intralinks	https://www.intralinks.com/	Diligence	Data room	Intralinks offers "one secure enterprise platform for simple file sync & share, collaborative team workspaces, large-scale virtual data rooms and structured workflows."	Cloud - ISO 27001, ISO 27017, AICPA SOC 2 Type II, Integration with Kira Systems
Merrill DatasiteOne	https://www.merrillcorp.com/en/technology-and-support-services/merrill-datasite	Diligence	Data room	Merrill DataSite's website states, "whether it's due diligence, content management, document formatting and printing, or conferencing facilities you need to make all documents fully accessible for both buyers and sellers right down to the page level, in our highly secure environment."	Cloud - ISO 27001
Ruby Datum	https://www.rubydatum.com	Diligence	Data room	Ruby Datum's offers an "Intuitive, Secure, Reliable and fast Virtual Data Rooms with automation ... proven for all sizes of transaction including those involving global Law Firms."	Cloud - Cyber Essentials Plus; Hosting ISO27001 Compliant
Venue Virtual Data Room	https://www.venue.vc/solutions/product/svenue	Diligence	Data room	Venue describes itself as a "secure, turn-key solution that enables clients to share highly privileged information beyond their firewalls with bidders, counterparties, investors and other controlled audiences."	Cloud; Integration with eBrevia
ANVI Insight	https://anviqa.com/	Diligence	Diligence automation	Anvi Insight offers to "help you in extracting vital clauses like term, termination, renewal, change of control in order to enable to give valuable feedback at a rapid pace."	Cloud or On Premise - Cyber Essentials
Cognitiv+	http://www.cognitivplus.com/	Diligence	Diligence automation	Cognitiv+ offers an "umbrella of analytical tools for contract review," including the ability to "assign tasks and documents to reviewers, legal team and subject-matter experts at document and clause level."	Cloud or On Premise
Diligen	https://www.diligensoftware.com/	Diligence	Diligence automation	Diligen offers "machine learning powered review and collaborative project management, all in one simple, secure interface."	Cloud or Private Cloud
eBrevia	https://ebrevia.com/	Diligence	Diligence automation	eBrevia say attorneys can "use its off-the-shelf products or customize eBrevia to your needs" to "extract textual data from thousands of documents."	Cloud or On Premise
Heretik	https://www.heretik.com/	Diligence	Diligence automation	Heretik says "whether managing massive M&A transactions, comparing messy employment agreements, or extracting critical data in bespoke contracts, our machine-learning solution reduces days or weeks of work to minutes."	Cloud or On Premise
Kira Systems	https://kirasystems.com/	Diligence	Diligence automation	Kira says its "machine learning artificial intelligence, excels at searching and analyzing contract and other relevant document text." Applications range from due diligence to contract analysis to lease abstraction and more.	Cloud or On Premise - AICPA SOC 2 Type II; Single sign-on integration; Integrations with Intralinks, HighQ and NetDocuments
kReveal	http://kreveal.com	Diligence	Diligence automation	kReveal "lets you immediately find and assess the contracts that color your deal...so you can get the most favorable terms - even with 1000s of contracts in the mix"	
LinkSquares	https://www.linksquares.com	Diligence	Diligence automation	LinkSquares "analysis technology automatically parses text from your contracts to identify key data, content, and liabilities."	Cloud - ISO 27001, SOC 2 Type II
Luminance	https://www.luminance.com/	Diligence	Diligence automation	Luminance says it "reads and understands contracts and other legal documents in any language, finding significant information and anomalies without any instruction." Luminance suggests it can be "used for due diligence, compliance, insurance or contract management."	Cloud or On Premise - ISO 27001
Clarilis	https://www.clarilis.info	Drafting	Document assembly	Clarilis allows attorneys to "send Clarilis your precedents, templates, variations, ancillaries and drafting notes," and they "harmonise the documents, design the questionnaire layout" and builds, automates and extensively tests your automation." "Clarilis then maintains the automated documents, making requested changes for you, for the life of the contract."	Cloud or Private Cloud - ISO 27001
Contract Express	http://www.contractexpress.com/	Drafting	Document assembly	Contract Express says its "patented template automation tool for MS Word enables lawyers to quickly automate and update even the most complex legal documents without needing programmers." It also offers client portals, collaboration tools and engagement letter generators.	Cloud or On Premise - ISO 27001
Contract Mill	https://contractmill.com	Drafting	Document assembly	Contract Mill offers to create "click through the questionnaires and have your document ready, fully customised for your needs and fully compliant to your policies" as well as "streamline and expedite your data collection from your client by a questionnaire and get the document generated automatically at your end."	Cloud
DocAssemble	https://docassemble.org	Drafting	Document assembly	"docassemble is a free, open-source expert system for guided interviews and document assembly. It provides a web site that conducts interviews with users. Based on the information gathered, the interviews can present users with documents in PDF, RTF, or DOCX format, which users can download or e-mail."	Installed
DraftLens	https://draftlens.com/	Drafting	Document assembly	DraftLens "simplifies ... the contract drafting process - finding a precedent, inserting new information, and formatting - and puts it into a smart, cohesive view" and "automatically handles section renumbering, defined term lists, signature pages, cover pages, TOCs and other common tasks."	Cloud
HotDocs	https://www.hotdocs.com/	Drafting	Document assembly	HotDocs offers the ability "to transform your frequently used documents and forms into intelligent templates that enable superfast production of custom documentation."	Installed, Cloud or On Premise
Lawyaw	https://www.lawyaw.com	Drafting	Document assembly	Lawyaw offers to "quickly turn frequently used Microsoft Word-based legal documents into easy to populate online templates"	Cloud
BlackBoiler	https://www.blackboiler.com	Drafting	Contract review	BlackBoiler claims to "learn from your past negotiated contracts and your company standards, creates client-specific editing models, and markup new inbound contracts instantaneously in Track Changes."	Cloud
Contract Companion	https://www.microsystems.com/products/legal/contract-companion/	Drafting	Contract review	Contract Companion offers "a Microsoft® Word toolbar that allows you to ensure your documents meet your firm's strict quality standards and your clients' expectations," by analyzing documents for defined terms and references, editing mistakes and displaying all issues in a consolidated dashboard.	Installed - Word add-on
Contract Tools	https://napersoftware.com/contract-tools.html	Drafting	Contract review	Contract Tools offers a Microsoft® Word add-on to analyze and proofread documents to find common drafting problems, maintain to do lists to keep track of unfinished items, find important information and explore connections in a contract.	Installed - Word add-on
Drafting Assistant	http://legalproducts.thomsonreuters.com/law-products/solutions/drafting-assistant	Drafting	Contract review	Drafting Assistant offers to "intelligently scan your legal documents in seconds, alerting you to errors, inconsistencies, missing information, and more."	Installed - Word add-on
JEugene	https://www.jeugene.com/	Drafting	Contract review	JEugene offers to "connect all key knowledge points at a glance, identify both technical busts and substantive problems, and leverage firms at-rest legal know-how" in reviewing and drafting legal documents.	Cloud, Private Cloud or On Premise
LawGeex	https://www.lawgeex.com/	Drafting	Contract review	LawGeex offers an artificial intelligence engine that "reads and analyzes incoming contracts, suggesting edits based on a company's pre-defined legal policies."	Cloud - ISO 27001
LexCheck	http://www.lexcheck.com/	Drafting	Contract review	LexCheck offers the ability to "detect drafting oversights ahead of time, limiting risk and the potential for disputes."	Cloud or Word add-on
PerfectIt	http://www.intelligentediting.com/	Drafting	Contract review	PerfectIt provides the "American Legal Style" guide that "enforces language and usage guidance, catches consistency errors, searches for common errors, and can be adapted to fit your firm's house style."	Installed
SuperDrafter	https://genieai.co/	Drafting	Contract review	SuperDrafter uses "state of the art machine learning to help lawyers draft contracts faster. clauses are recommended using machine learning, and can be searched by sector, client and other smart filters, providing an automatic knowledge base for law firms."	Cloud, Private Cloud or On Premise - ISO 27001

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Adobe Acrobat	https://acrobat.adobe.com/us/en/acrobat.html	Drafting	Document manipulation	Adobe invented the Portable Document Format (PDF). "When you create a PDF with Acrobat or one of our online services, you get more than a picture of your document. You get a smart file you can edit, sign, share, protect, and search. Plus, you know it will look right on any screen."	Installed
DocXTools	https://www.litera.com/products/legal/docxtools-for-legal/	Drafting	Document manipulation	DocXTools offers "a robust set of tools to help you repair and style your documents" to "improve collaboration, and produce high-quality documents."	Installed - Word add-on
pdfDocs	https://www.docscm.com/	Drafting	Document manipulation	pdfDocs describes itself as "a project-centric PDF management application that gives users the ability to create, collate, edit, redact, annotate and secure PDF content."	Installed
PowerPDF	https://www.nuance.com/	Drafting	Document manipulation	PowerPDF says it "combines ease-of-use with powerful tools to create, edit, convert, annotate, combine and manage PDF documents. Combine documents of any file type into a single PDF or convert PDF files to other formats including Word, Excel, PowerPoint, images and more."	Installed
Redact Assistant	http://www.thepaynecgroup.com/products/redact/	Drafting	Document manipulation	Redact Assistant is described on its website as "a software program used to black out or hide specific text in Microsoft Word and Excel files in order to obscure part of the file's text for legal, security, or regulatory compliance reasons."	Installed - Word, Excel add-on
Bloomberg Law: Corporate & Transactional	https://www.bna.com/transactional-law-resource/	Drafting	Market comparison	Bloomberg Law: Corporate & Transactional tools offer "drafting guides and other practical guidance, expert commentary and transaction-related news as well as specialized precedent searches designed to help you find relevant precedent documents and clauses" and a draft analyzer to "compare your draft language against market standard language."	Cloud
Deal Point Data	https://www.dealpointdata.com/	Drafting	Market comparison	Deal Point Data offers "to streamline the process of researching, drafting and negotiating to allow attorneys to quickly identify on-point precedents."	Cloud
Debt Explained	https://www.debtexplained.com/	Drafting	Market comparison	Debt Explained claims to have "the finest data, the best tools to search... for comprehensive information on a deal, on the market - and on trends."	Cloud
FactSet	https://www.factset.com/products/legal/	Drafting	Market comparison	FactSet analyzes "thousands of global public and private companies, industries, markets, private equity and venture capital firms, as well as their funds and portfolio companies," including "in-depth research on US public companies' takeover defense strategies" and "mergers involving US public targets."	Cloud
Intelligize	https://www.intelligize.com/	Drafting	Market comparison	Intelligize describes itself as "the leading provider of best-in-class content, exclusive news collections, regulatory insights, and powerful analytical tools for compliance and transactional professionals."	Cloud
SRS Acquiom MarketStandard	https://www.srsacquiom.com/marketstandard/	Drafting	Market comparison	MarketStandard offers "to help deal parties determine 'what's market,'" by allowing users to "filter data and assess market terms for the specific deal you're negotiating by drawing information from over 1,200 deals—with more added every day."	Cloud
Pitchbook	https://pitchbook.com/	Drafting	Market comparison	Pitchbook offers "the information you need when you're consulting on a deal, including precedent transactions."	Cloud
Practical Law	https://us.practicallaw.com	Drafting	Market comparison	Practical Law "resources include practice notes, standard documents and clauses, checklists, toolkits, legal updates, market trend tools, state-specific guidance, and more."	Cloud
Thomson Reuters Panoramic	https://panoramic.thomsonreuters.com/	Drafting	Market comparison	Panoramic offers a "new legal workflow solution that enables firms to plan, manage and execute legal matters with data-driven confidence. Panoramic is built on the strong foundation of Practical Law's legal guidance and 3E's market-leading financial management system, enabling firms to predict profitability and provide better service and unprecedented transparency to their clients. With knowledge resources embedded into the workflow, lawyers can execute with confidence and deliver their best work faster."	Cloud - 27001:2013 and ISO 9001; FIPS 140-2; NIST 800-171; Cyber Essentials Plus; GDPR Compliant and EU/US Privacy Shield
Wolters Kluwer M&A Clause Analytics	https://us.wolterskluwer.com/store/m-a-clause-analytics/	Drafting	Market comparison	M&A Clause Analytics offers "a comprehensive database of acquisition and ancillary agreements, analyzes and compares M&A agreements and related documents against an AI generated statistical Market Standard, providing vital insights and guidance for drafting, benchmarking, and negotiating better clauses and more complete agreements."	Cloud
Change-Pro	https://www.litera.com/products/legal/change-pro/	Negotiating	Document comparison	Change-Pro offers a "comprehensive comparison of every element in your Word, Powerpoint, Excel, and PDF files."	Installed
compareDocs	https://www.docscm.com/	Negotiating	Document comparison	compareDocs claims to be "the leading tool for comparing two documents for differences across all document types."	Installed
Exari Compare	https://compare.exaricompare.com/	Negotiating	Document comparison	Exari Compare offers the ability to "Upload documents of varying format types"; "Identify and review every discrepancy"; and "Download a comparison results document."	Cloud - AICPA SOC 2 with HIPAA Compliance Schedule
Workshare Compare	https://www.litera.com/products/legal/workshare-compare/	Negotiating	Document comparison	Workshare Compare offers "world-class comparison as a traditional Windows application on the desktop or as a cloud-delivered app that can run inside browsers, mobile devices, PCs, or be embedded in other document creation, sharing and management platforms."	Installed or Cloud - ISO 27000
Avvoka	https://avvoka.com/	Negotiating	Negotiation platform	Avvoka is a "contract creation, live-negotiation and analytics platform" that includes the ability to "negotiate in real-time" and "track clause variations across your contract portfolios, to establish where you're altering standard terms."	Cloud
dealcloser	https://dealcloser.com/	Negotiating	Negotiation platform	dealcloser offers the opportunity to "manage a large number of documents, track document versions, and send documents for client signature, all from an intuitive online dashboard" along with the opportunity to create a closing book "with just the click of a button"	Cloud
Litera Transact	https://www.litera.com/products/legal/transaction-management/	Negotiating	Negotiation platform	Doxy describes itself as "a secure transaction management platform" that supports legal transactions by "centralizing checklists & reporting, tracking documents, tasks, & versions and automating the entire signature management process."	Cloud, Private Cloud or On Premise - Single Sign-on integration; Integrations with DocuSign, iManage and NetDocuments
HighQ	https://highq.com/en-us/solutions/law-firms/digital-transaction-management/	Negotiating	Negotiation platform	HighQ offers the ability to "Manage, share and collaborate on sensitive documents and content in secure matter workspaces. Create a single source of truth for projects with a real time view of tasks, activities and progress. Centralise team and client communication to enhance transparency, efficiency and productivity."	Cloud or Hybrid - ISO 27001, ISO 22301, AICPA SOC 2 Type II, FIPS 140-2 Level 3, Cyber Essentials Plus, CSA STAR, HIPAA, GDPR; Integrations with Kira Systems, LEVERTON, Luminance, Neota Logic and RAVN
Juro	https://juro.com/legal.html	Negotiating	Negotiation platform	Juro offers the ability to "stay in control and track all your documents with a dashboard for your contract pipeline. Deploy powerful search capabilities to find exactly what you need, right when you need it."	Cloud - Cyber Essentials Plus
Legatics	http://www.legatics.com/	Negotiating	Negotiation platform	Legatics offers a "live status of deal progress and summarises the actions each party needs to take next" while providing a graphical "client dashboard" and automatically generating "transaction bibles in your firm's traditional house format."	Cloud - ISO 27001, Cyber Essentials Plus
Parley Pro	https://parleyp.com/	Negotiating	Negotiation platform	Parley Pro offers to replace "labor intensive contract negotiation processes that involve redlines, emails, and manual reconciliation with an easy, fast, and elegant process" by allowing all parties to work on the same document version and leverage a discussion board to focus negotiators on key negotiation issues.	Cloud
Adobe Sign	https://acrobat.adobe.com/us/en/sign.html	Closing	Digital signature	Adobe Sign offers to "bring e-signing capabilities to more than one billion devices around the world. Now anyone can legally sign documents with a finger on a touch-enabled device — or with a few quick clicks in a browser."	Cloud - ISO 27001, AICPA SOC 2 Type II, and PCI DSS
DocuSign	https://www.docusign.com/	Closing	Digital signature	According to its website, "DocuSign enables people around the world to electronically sign documents, approvals, and agreements—on any device, in any time zone."	Cloud - ISO 27001 and AICPA SOC 2 Type II
CamScanner	https://www.camscanner.com/	Closing	Closing management	CamScanner offers iOS and Android apps to scan documents using mobile phones. CamScanner offers the ability to "auto-enhance image quality, convert images to text files and fax to more than 30 countries and regions."	Cloud - iOS, Android apps
Closing Folders	https://www.closingfolders.com/	Closing	Closing management	Closing Folders offers to "track and organize every version, comment, signature, and schedule on your legal transaction so your team always has the latest information about every aspect of the deal."	Cloud, Private Cloud or Hybrid - GDPR-compliant; Single Sign-on integration; Integrations with DocuSign, iManage and NetDocuments
Litera Transact	https://www.litera.com/products/legal/transaction-management/	Closing	Closing management	Doxy offers the ability to create "signature blocks once rather than hundreds of times, pages are formatted automatically for each signer and signature packets are created without ever printing or scanning a single page — tracking the status of every signature page for you."	Cloud, Private Cloud or On Premise - Single Sign-on integration; Integrations with DocuSign, iManage and NetDocuments

Directory of M&A Technologies

Technology Name	Website	Category	Subcategory	Description	Configuration and Integrations
SetBuilder	https://www.netdocuments.com/products/collaboration/#SetBuilder	Closing	Closing management	SetBuilder offers to "remove the manual and tedious task of building document sets for everyone in your organization, whether it be creating closing documentation or organizing onboarding documents for new hires."	Cloud - ISO 27001, ISO 27017, ISO 27018, AICPA Soc 2 Type II, GDPR, HIPAA; Integration with NetDocuments
SimplyAgree	https://simplyagree.com/	Closing	Closing management	SimplyAgree offers to "simplify deal closings" by "streamlining the creation of signature packets, supporting the collection and tracking of handwritten and electronic signatures, and automating the compilation of executed agreements and closing binders."	Cloud, Private Cloud or On Premise - Single Sign-on integration; Integrations with DocuSign, Manage and NetDocuments
SRS Acquiom Clearinghouse	https://www.srsacquiom.com/solutions/	Closing	Closing management	SRS Acquiom Clearinghouse is a "shareholder interface for collecting documents and making payments and a real-time buyer portal which allows the buyers to know up to date the status of all payments and provide reconciliements, copies of LOTS, wire and ACH reference numbers and copies of checks issued and cashed."	Cloud - AICPA SOC 2
Cactable.io	https://cactable.io/	Organization	Capitalization table management	Cactable.io describes its product as "easy cap table creation, sharing & collaboration, fast 409A valuations, stock option plan management and powerful round & exit modeling."	Cloud
Carta	https://carta.com/	Organization	Capitalization table management	Carta describes its product as "tools to scale equity management and stay compliant," including the ability to manage cap tables, run 409A valuations, create financial reporting, and ensure global compliance when issuing equity, executing a tender offer, or managing board approvals.	Cloud - AICPA Soc 1 Type II
Solium Shareworks (Corporate Focus)	https://solium.com	Organization	Capitalization table management	Solium "simplifies the complexities of equity plan management," providing global compliance as well as expense accounting, forms filings, cap tables and equity projections.	Cloud - AICPA SOC 2 Type II
Brightleaf	http://www.brightleaf.com/	Organization	Knowledge management	Brightleaf offers to "extract information from your contracts to leverage the knowledge in your existing contracts, report on the extracted data."	Cloud
ContractStandards	https://www.contractstandards.com/	Organization	Knowledge management	ContractStandards website says "our platform allows organizations to consolidate contracts, standardize language, and create and manage templates intelligently."	Cloud
Eigen Technologies	http://www.eigentech.com/	Organization	Knowledge management	Eigen Technologies offers "flexible natural language processing technology to accurately extract data from diverse documents at scale and to classify these documents based on their content. Using state-of-the-art machine learning algorithms, our product learns to recognize patterns in your text to give you accurate answers to your unique questions."	Cloud or On Premise - ISO 27001, ISO 27017, ISO 27018, ISO 22301
Exari Vision	https://www.exari.com/contract-management-products-and-solutions/exari-vision	Organization	Knowledge management	Exari Vision describes itself as "automating the data extraction process to provide unprecedented speed and accuracy, allowing you to fully operationalize your business data."	Cloud - AICPA SOC 2 Certified with HIPAA Compliance Schedule
iManage RAVN	https://imanager.com/product/ravn/	Organization	Knowledge management	iManage describes itself as "a cutting-edge Artificial Intelligence platform that powers a number of applications to automatically organize, discover and summarize your documents."	Cloud or On Premise - ISO 27001, ISO 27002, ISO 27017, ISO 27018, ISO 22301 SOC 2 Type 2, NIST 800-171, HIPAA; Integration with iManage
Seal Software	https://www.seal-software.com/industry-legal-services	Organization	Knowledge management	Seal Software offers the following capabilities: "template standardization and non-standard clause detection; creation of contract playbooks for alternative/fallback clauses; locating specific contracts that pertain to a relevant matter; customized clause extraction; M&A due diligence; general long-term contract management and maintenance."	Cloud or On Premise - AICPA Soc 2 Type I
Thomson Reuters Panoramic	https://panoramic.thomsonreuters.com/	Organization	Knowledge Management / Project Management	Panoramic offers a "new legal workflow solution that enables firms to plan, manage and execute legal matters with data-driven confidence. Panoramic is built on the strong foundation of Practical Law's legal guidance and 3E's market-leading financial management system, enabling firms to predict profitability and provide better service and unprecedented transparency to their clients. With knowledge resources embedded into the workflow, lawyers can execute with confidence and deliver their best work faster."	Cloud - 27001:2013 and ISO 9001; FIPS 140-2; NIST 800-171; Cyber Essentials Plus; GDPR Compliant and EU/US Privacy Shield
Asana	https://asana.com/	Organization	Project Management	Asana offers to "quickly capture tasks, to-dos, reminders, and ideas. Get updates from coworkers, organize tasks and projects for work, or manage your to-do list for the day. With Asana's mobile app, you can stay on top of your work from anywhere."	Cloud - AICPA Soc 2 Type I; Single sign-on integration
Cael Project	http://elavestudios.com/cael-qaos/	Organization	Project Management	Cael Project offers to "streamline legal project management for lawyers, with a practical approach and a user-friendly interface that works on desktops, laptops, and tablets."	Cloud - ISO 27001
HighQ	https://highq.com/en-us/solutions/project-management/	Organization	Project Management	HighQ offers to "Create automated workflows to standardize M&A, litigation, real estate and other transactional processes. Use project management tools to ensure efficient, repeatable processes, delivered on time and to budget."	Cloud or Hybrid - ISO 27001, ISO 22301, AICPA SOC 2 Type II, FIPS 140-2 Level 3, Cyber Essentials Plus, CSA STAR, HIPAA, GDPR; Integrations with Kira Systems, LEVERTON, Luminance, Neota Logic and RAVN
Jira	https://www.atlassian.com/software/jira	Organization	Project Management	Jira offers the ability to "track progress across teams and projects and easily share your plan with stakeholders"	Cloud - AICPA SOC 2 Type II, ISO 27001, ISO 27018, PCI DSS, CSA Star Level 1, GDPR compliant, EU/US Privacy Shield
Microsoft Project	https://products.office.com/en-us/microsoft-project-and-portfolio-management-software	Organization	Project Management	Microsoft Project offers to "streamline project, resource, and portfolio management with Microsoft Project & Portfolio Management. Integrated planning tools help you keep track of projects and stay organized."	Installed
Smartsheet	https://www.smartsheet.com	Organization	Project Management	Smartsheet offers to "empower business users to quickly configure, adapt, and improve their work processes to speed execution. Frictionless sharing with stakeholders eliminates silos and brings teams together. Clear accountabilities foster deeper ownership and more engaged teams."	Cloud - AICPA SOC 2 Type II Certified, PCI DSS, HIPAA, GDPR, EU/US Privacy Shield
Trello	https://trello.com/	Organization	Project Management	Trello offers a mobile and web-based product that offers to make "working on group projects as easy as using sticky notes on your whiteboard. Trello's drag-and-drop interface and visual way of organizing your tasks makes sure you always know what needs to get done and who's working on it."	Cloud - PCI DSS
Basecamp	www.basecamp.com	Organization	Collaboration	Basecamp offers the following features: "To-dos for tracking work, a message board for posting announcements and updates, a campfire chat room for quick casual chats with the team, as schedule for posting deadlines and milestones, docs & files for organizing all the assets and notes everyone needs to do their work, and automatic check-ins to get insights from the team on a regular basis."	Cloud
Hubshare	https://www.hubshare.com	Organization	Collaboration	Hubshare offers a "collaboration portal that allows seamless secure document and information sharing, project and task management, as well as matter management in and all in one engaging platform."	Cloud
ndThread	https://www.netdocuments.com/products/collaboration/#ndThread	Organization	Collaboration	ndThread offers to "organize topical conversations and document collaboration into a single, secure repository for your team to easily access and stay up-to-date on project status."	ISO 27001 certification, including the additional controls from ISO 27017 and ISO 27018
Slack	https://slack.com/	Organization	Collaboration	Slack describes its product as "a team communication application providing services such as real-time messaging, archiving, and to search for modern teams," offering "one-on-one messaging, private groups, persistent chat rooms, and direct messaging as well as group chats organized by topic."	Cloud or Installed - NIST 800-171, AICPA SOC 2 Type II, ISO 27001, ISO 27017, ISO 27018, CSA Star, HIPAA, GDPR, EU/US Privacy Shield; Single sign-on integration
TeamConnect + TAP	https://www.imbratech.com/products/teamconnect/	Organization	Collaboration	TeamConnect + TAP offers "workflow automation and integration tools" to "standardize routine documents, forms, and workflows" and "unite people and processes."	Cloud - FIPS 140-2; Single sign-on integration
Autto	http://www.autto.io/	Organization	Experience automation	Autto offers an "intuitive workflow editor allows you to create, visualise and publish workflows made of forms, conditions, actions and content with conditions to trigger more forms or actions."	Cloud
Berkeley Bridge Expert Systems	https://www.berkeleybridge.com/expertsystems/	Organization	Experience automation	Expert systems offers the possibility that "knowledge use within these organizations can significantly be broadened to reduce costs, increase efficiency, improve services, and comply with current laws and regulations."	Cloud or On Premise - ISO 27001
Bryter	https://www.bryter.io/	Organization	Experience automation	Bryter offers "to turn expert knowledge and workflows to save time, nerves and money. State-of-the-art reports and business analytics (BI) provide full transparency, visibility, accountability and reduce risks."	Cloud or On Premise
Kim Technologies	http://ask.kim/	Organization	Experience automation	Kim Technologies claims it can allow "knowledge workers such as lawyers or paralegals to automate their own processes and documents in hours rather than wait weeks or months for an IT project which may or may not capture their requirements accurately."	Cloud
Neota Logic	https://www.neotalogic.com/	Organization	Experience automation	Neota Logic offers support for a number of law firm processes: "Create applications for client intake & early case assessment, build applications to analyze & advice for compliance with regulations, policies, or procedures; enforce standard process workflow to ensure consistent and complete work product; automate the selection, drafting, delivery, and archiving of contracts, forms, or other documents."	Cloud or On Premise

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ThinkSmart	https://thinksmart.com/	Organization	Experience automation	ThinkSmart says its ThinkSmart Automation Platform (TAP) was "designed to accelerate Legal Operations, replacing inefficient paper-based workflows with automated processes."	Cloud or Hybrid or On Premise - PCI DSS, AICPA SOC 2
Security standards guide					
ISO/IEC 27000 series				International Organization for Standardization Information security management systems	https://www.iso.org/isoiec-27001-information-security.html
AICPA SOC				American Institute of CPAs System and Organization Controls (Type I and II)	https://www.aicpa.org/soc
FIPS 140-2				Federal Information Processing Standard used to approve cryptographic modules	https://csrc.nist.gov/groups/stm/cmp/standards.html
NIST 800-171				Protecting Controlled Unclassified Information in Nonfederal Systems and Organizations	https://csrc.nist.gov/publications/detail/sp/800-171/rev-1/final
Cyber Essentials Plus				Certification from UK National Cyber Security Centre	https://www.cyberessentials.nccsc.gov.uk/
CSA STAR				Cloud Security Alliance (Level One, Two and Three)	https://cloudsecurityalliance.org/star/
PCI DSS				Payment Card Industry Data Security Standard	https://www.pcisecuritystandards.org/
HIPAA				Health Insurance Portability and Accountability Act	https://www.hhs.gov/hipaa/index.html
GDPR				General Data Protection Regulation	https://eur-lex.europa.eu/eli/reg/2016/679/oj
EU/US Privacy Shield				U.S. Department of Commerce and the European Commission data compliance mechanism	https://www.privacyshield.gov/