Document Automation: Vendor Analysis - Clarilis

COMPANY	
Vendor	Clarilis
Solution	Clarilis
Launch year	Clarilis was launched in 2015.
Age of Company	Clarilis was formed in 2011.
Founders	James Quinn (Co-Founder, CEO), Kevin Quinn (Co-Founder, CTO)
Diversity of Founders	n/a
Experience of Founders	James co-founded Clarilis and is our CEO. James is a lawyer and previously practiced at Slaughter and May in London and Hong Kong. https://www.linkedin.com/in/jamespatrickquinn/ Kevin co-founded Clarilis and is our CTO and the technical architect of the Clarilis system. Prior to forming Clarilis, Kevin was the lead developer on a number of key projects for GE Power Systems, DHL, FT.com and several banks in the City of London. https://www.linkedin.com/in/kevin-quinn-86b51778/
Previous Companies by Founder	n/a
Funding History	Clarilis is VC backed and has received GBP 9.1M in two funding rounds, the most recently being in 2020 for GBP 6M.
HQ	UK
Offices	UK; Singapore
Languages	Automations can be in any language
Regions Served	United Kingdom, Ireland, (wider Europe), Africa, Canada, Singapore, and the US.
Target Audience	Law firms, particularly those with Corporate, Banking & Finance, Real Estate, Private Client, and Employment practices. Clarilis also serves corporate legal departments, ALSPs and legal consultancies.
Breakdown of Existing Customers	90%+ of Clarilis' customers are law firms, with the remaining <10% being legal departments.
Existing Customers	Clarilis has customers worldwide, including over 50% of the top 60 law firms in the UK. Law firm customers include Slaughter and May, Travers Smith, Addleshaw Goddard, Herbert Smith Freehills, Osler, and Gowling WLG. In addition, Clarilis works with the in-house teams of Biffa, PwC, 123Dentist, National Grid, and Cadent.

	A fuller list of customers and additional details can be found here https://www.clarilis.com/customers
Consolidations, Acquisitions	n/a

GENERAL PRODUCT INFORMATION

Predominant Use Cases	Clarilis is the combination of an effective document automation platform and a lawyer-led fully managed service. We specialize in the automation of complex suites of transactional documents. Typical use cases include: • corporate (M&A and reorg) • early stage investments, • banking and finance, • real estate, • labor and employment; and private client.
Secondary Use Cases	Clarilis can be used to automate any document.
Type of Ideal User	Law firms and in-house legal teams that draft complex suites of documents.
Practice Areas Supported	Typical use cases include: • corporate (M&A and reorg) • early stage investments, • banking and finance, • real estate, • labor and employment; and private client.
Key Features	Clarilis is designed for deep automation of complex suites of documents that drive tangible benefits. Our users can draft complete M&A suites (including all ancillaries) in under two hours, and complex banking facility agreements in under an hour. The Clarilis platform is specifically designed to handle complex legal drafting - adopting a highly structured approach and a rules-based methodology. The platform models the matter and intelligently utilizes its rules-based engine to produce the required suites of documents that are 100% house style conformant.
Differentiation from Competitors	The Clarilis drafting platform provides lawyers with a deep level of automation, designed to handle complex suites of documents. This technology platform is combined with Clarilis lawyer-led managed service. The large team of Clarilis Professional Support Lawyers and implementation specialists design, build, test, deliver, and maintain the automations for clients. In addition to fully bespoke automations, Clarilis has a growing library of pre-automated content in corporate, banking and real estate. These are available off-the-shelf for instant deployment and value.

DEPLOYMENT INFORMATION

Ease of Implementation	Clarilis handles the entire automation project, from conception through to implementation, and beyond. A library of pre-automated solutions is also available off-the-shelf for instant deployment and value.
Deployment Options	Clarilis is provided as a SaaS solution.
Predominant Deployment Method	Clarilis is provided as a SaaS solution.
Infrastructure Required	None, Clarilis is provided as a SaaS solution.
Integrations	Clarilis fits as part of the legal technology jigsaw for each of its Customers. This includes live links to external data sources such as UK Companies House, Orbis (was Bureau van Dijk), Irish Companies House (CRO), UK Post Office postcode lookup, Singapore Companies House (ACRA) etc. Clarilis can obtain data from any system that allows API access. Clarilis integrates with Microsoft (ADFS and Azure) for Single Sign On ("SSO"). Clarilis has also integrated with workflow tools and Document Management Systems (DMSs).
APIs	Clarilis has APIs to enable integrations with tools such as workflow tools and Document Management Systems (DMSs).
Public Registry Integrations	Clarilis has live links to data sources such as UK Companies House, Orbis (was Bureau van Dijk), Irish Companies House (CRO), UK Post Office postcode lookup, Singapore Companies House (ACRA).

PRODUCT FEATURES

Automation and Workflows

Complex Document Automation Features	Clarilis takes a high structured approach to automation, leveraging its transaction specific data models and feature rich automation engine to produce deep automation of complex suites of documents. Clarilis is known in the market for producing significant, rather than marginal, time savings for drafting fee-earners.
Automating Tables in Documents	Yes
Generate/Trigger Workflow and Approvals	Yes
Drafting Document Suites	Entire suites of documents, including all ancillaries, can be drafted from a single questionnaire.
Document Formats Supported	Clarilis can generate documents in Microsoft Word and PDF format.

eSignature Capabilities	Clarilis can prepare the documents ready for eSignature, but does not itself incorporate eSignature capabilities.
End User Engagement	
Intuitiveness of User Questionnaire	The dynamic, web-based questionnaires are split into tabs and subtabs to present the questions. Questions can be answered in any order, and due to the 'drafting by subtraction' nature of the solution, any answer can be left blank. See screenshots on the Clarilis profile.
Customising Questionnaire Display	The web-based interface dynamically changes based on the answers provided and is fully customized by Clarilis for the customer, including the branding. Clarilis also includes extensive guidance to help junior fee earners.
Previewing a Document when Answering Questionnaire	Clarilis provides a full preview of the document within the questionnaire, to show the document evolving as questions are answered. The preview includes a dynamic table of contents and footnotes/guidance.
Sharing Questionnaires	Users can share/transfer questionnaires via the web-based interface, with emails automatically sent to the receiving user.
Client Portals	The Clarilis questionnaire can be faced to the end client, enabling clients to fully or partially complete it themselves. The style and range of questions can be fully customized, i.e. the client may see a subset of the overall questions.
Templates	
Intuitiveness of Template Builder	As a fully managed service, the Clarilis team builds, manages, tests and maintains automation projects for customers. There is no requirement to build an internal automation team, or to spend the time building complex templates.
Template Automation Support	As a fully managed service, the Clarilis team builds, manages, tests and maintains automation projects for you. There is no requirement to build an internal automation team, or to spend the time building complex templates.
Migrating Templates from Existing Tools	Clarilis can migrate templates from other automation toolkits.
Template Builder Ecosystem	Clarilis offers a fully managed service, including template building.
Managing and Updating Templates	A license of Clarilis includes unlimited amendments and updates at no extra charge.
MS Word or Browser-based Template Builder	All automation occurs within the browser-based platform, no Microsoft Word integrations or plugins are required.
Bilingual Document Template Support	Clarilis creates automations in multiple languages for customers globally.

Storing Generated Documents	Clarilis creates the first draft of the documents, which can then be saved into the customer's chosen DMS. Clarilis also retains an audit copy of all documents created by the system for review by the customer.
Reporting	
Usage Statistics	Clarilis provides in-depth monthly reporting and rolling 12-month reports. These detail items such as who accessed the system, new matters created, drafts produced and a range of other analytics.
Custom Reporting Capabilities	On request.
CUSTOMER SUPPORT INFORMATION	
Customer Service	Clarilis provides full email and telephone support for its customers globally.
Training Offerings	Clarilis provides full training on the use of its system. Minimal training is ever required due to the user experience.
Training Collateral	Clarilis provides suitable training collateral, including documents and videos where appropriate.
PRICING AND POC	
Pricing Model	Please speak with Clarilis directly, this depends on the solution taken - pricing is on application.
Pricing Flexibility	Please speak with Clarilis directly.
Pilot / POC Model	Please speak with Clarilis directly, this depends on the type of solution taken.
Flexibility of Pilot / POC Offered	Please speak with Clarilis directly.
Pilot / POC Pricing	Please speak with Clarilis directly.
Pilot / POC Services and Support	Please speak with Clarilis directly.
PRIVACY AND SECURITY	
Role Based Permissions	Clarilis has full roles-based permissions, integrated to the customer firm's Single Sign On, to control access to admin roles, automated suites, questions shown in the questionnaire etc, at a person and group level.
Compliance with data privacy & security standards	Clarilis provides a highly secure environment that protects customer documents and client data in transit and at rest. Clarilis is ISO27001:2013 certified by the British Standards Institute (BSI), meaning that its security structures have been thoroughly audited and approved.

	Clarilis integrates with the customer firm's Single Sign On ("SSO") solution for 2-factor authentication and to simplify user management. Clarilis adheres to the data privacy and security standards of its global large law customer base.
Data Hosting Location(s)	The Clarilis solution is hosted and processed in specified AWS regions to ensure compliance with local legislation. Regions are defined by the customer at the initiation of a contract and the data remains within that region for both storage and processing.