



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 Daniel Rosenberg of Charles Russell Speechlys LLP (daniel.rosenberg@crsllaw.com) or Technology in M&A Subcommittee Vice Chair Thomas Romer of Greengberg Traurig LLP (tomer@gtlaw.com).

### Directory of M&A Technologies

Technology Name	Website	Category	Subcategory	Description	Configuration and Integrations
Ansarada	<a href="https://www.ansarada.com/">https://www.ansarada.com/</a>	Diligence	Data room	Ansarada offers to "speed and visibility with Q&A facility, review and approval workflows, commenting tools and notifications"	Cloud
Firmex	<a href="https://www.firmex.com/">https://www.firmex.com/</a>	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
HighQ	<a href="https://legal.thomsonreuters.com/en/products/highq/virtual-data-rooms">https://legal.thomsonreuters.com/en/products/highq/virtual-data-rooms</a>	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	<a href="https://www.intralinks.com/">https://www.intralinks.com/</a>	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
Datasite	<a href="https://www.datasite.com/">https://www.datasite.com/</a>	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
Venue Virtual Data Room	<a href="https://www.vfinsolutions.com/products/vvdr">https://www.vfinsolutions.com/products/vvdr</a>	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	<a href="https://anvi.legal.com/">https://anvi.legal.com/</a>	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+	<a href="http://www.cognitivplus.com/">http://www.cognitivplus.com/</a>	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	<a href="https://www.diligen.com/">https://www.diligen.com/</a>	Diligence	Diligence automation	Diligen offers "machine learning powered review and collaborative project management, all in one simple, secure interface."	Cloud or Private Cloud
eBrevia	<a href="https://ebrevia.com/">https://ebrevia.com/</a>	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 - SOC 2 Type II; Integrations with iManage, Microsoft SharePoint, Box, Intralinks, Venue and all major data rooms
Heretik	<a href="https://www.heretik.com/">https://www.heretik.com/</a>	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	<a href="https://kirasystems.com/">https://kirasystems.com/</a>	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
Knowable	<a href="https://www.knowable.com/mergers-acquisitions/">https://www.knowable.com/mergers-acquisitions/</a>	Diligence	Diligence automation	Knowable Contracts Intelligence Platform offers the ability to "turn contractual language into valuable reporting and analytics that empowers cross-functional stakeholders to more effectively identify and capture integration and synergy opportunities."	Cloud
kReveal	<a href="http://kreveal.com/">http://kreveal.com/</a>	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	<a href="https://www.linksquares.com/">https://www.linksquares.com</a>	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	<a href="https://www.luminance.com/">https://www.luminance.com/</a>	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	<a href="https://www.clarilis.info">https://www.clarilis.info</a>	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
HighQ	<a href="https://legal.thomsonreuters.com/en/products/highq/document-automation">https://legal.thomsonreuters.com/en/products/highq/document-automation</a>	Drafting	Document assembly	HighQ Document Automation powered by Contract Express offers to "automate and de-risk legal document creation to help you drive efficiency, speed turnaround, reduce mistakes, mitigate risk, improve client service, streamline workflow and much more."	Cloud or On Premise - ISO 27001
Contract Mill	<a href="https://contractmill.com">https://contractmill.com</a>	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	<a href="https://docassemble.org">https://docassemble.org</a>	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
HotDocs	<a href="https://www.hotdocs.com/">https://www.hotdocs.com/</a>	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	<a href="https://www.lawyaw.com">https://www.lawyaw.com</a>	Drafting	Document assembly	Lawyaw offers to "quickly turn frequently used Microsoft Word-based legal documents into easy to populate online templates"	Cloud
Office & Dragons	<a href="https://www.officeanddragons.com/">https://www.officeanddragons.com/</a>	Drafting	Document assembly	Office & Dragons offers the ability to "automate legal document editing and delivery workflows at scale, create and edit any contract for any transaction quickly, without being bound to standard forms, and capture deal experience as data to enhance decision making and deliver your expertise at scale."	Cloud
Woodpecker	<a href="https://www.woodpeckerweb.com/">https://www.woodpeckerweb.com/</a>	Drafting	Document assembly	Woodpecker offers "sophisticated functionality like conditional logic, a clause library, and formula fields, you can use one smart Word template to create every version of a contract or agreement you might need."	Cloud
BlackBoiler	<a href="https://www.blackboiler.com">https://www.blackboiler.com</a>	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	<a href="https://www.litera.com/products/legal/contract-companion/">https://www.litera.com/products/legal/contract-companion/</a>	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	<a href="https://papersoftware.com/contract-tools.html">https://papersoftware.com/contract-tools.html</a>	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
(Bloomberg Law) Draft Analyzer	<a href="https://pro.bloomberglaw.com/draft-analyzer/">https://pro.bloomberglaw.com/draft-analyzer/</a>	Drafting	Contract review	Bloomberg Law Draft Analyzer "helps lawyers compare provisions in their draft to similarly drafted paragraphs in the millions of exhibits filed in EDGAR to show the developing consensus among drafters."	Cloud
Drafting Assistant	<a href="http://legalsolutions.thomsonreuters.com/law-products/solutions/drafting-assistant">http://legalsolutions.thomsonreuters.com/law-products/solutions/drafting-assistant</a>	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
LawGeex	<a href="https://www.lawgeex.com/">https://www.lawgeex.com/</a>	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
LegalSifter	<a href="https://www.legalsifter.com/legalsifter-view">https://www.legalsifter.com/legalsifter-view</a>	Drafting	Contract review	LegalSifter describes itself as "an AI and expertise software that reads contracts before they are signed, saving the reviewer time and reducing risk."	Cloud

## Directory of M&A Technologies

Technology Name	Website	Category	Subcategory	Description	Configuration and Integrations
LexCheck	<a href="http://www.lexcheck.com/">http://www.lexcheck.com/</a>	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	<a href="http://www.intelligentediting.com/">http://www.intelligentediting.com/</a>	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	<a href="https://genieai.co/">https://genieai.co/</a>	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
Adobe Acrobat	<a href="https://acrobat.adobe.com/us/en/acrobat.html">https://acrobat.adobe.com/us/en/acrobat.html</a>	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
Blackmarker	<a href="https://www.blackmarker.com/">https://www.blackmarker.com/</a>	Drafting	Document manipulation	Blackmarker offers to "reliably redact sensitive information with ease" and "guarantee compliance by eliminating all metadata."	Cloud
DocXTools	<a href="https://www.litera.com/products/legal-doc-tools-for-legal/">https://www.litera.com/products/legal-doc-tools-for-legal/</a>	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
(Litera) pdfDocs	<a href="https://www.docscorp.com/">https://www.docscorp.com/</a>	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
Naix	<a href="https://naix.ai/">https://naix.ai/</a>	Drafting	Document manipulation	Naix offers to "save more than 50% of your time compared to manual anonymization tools and more than 80% compared to manual redaction."	Cloud, Private Cloud or On Premise - ISO/IEC 27001:2013
PowerPDF	<a href="https://www.nuance.com/">https://www.nuance.com/</a>	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	<a href="https://new.thepsynegroup.com/metadata-assistant">https://new.thepsynegroup.com/metadata-assistant</a>	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
Redacted.ai	<a href="https://redacted.ai/">https://redacted.ai/</a>	Drafting	Document manipulation	Redacted.ai offers to "automatically find and redact sensitive and personal data instantly, removing all elements and metadata of the information, so it's impossible to reverse."	
(Bloomberg Law) Deal Analytics	<a href="https://www.bloomberglaw.com/help/transactional-intelligence-center/deal-analytics">https://www.bloomberglaw.com/help/transactional-intelligence-center/deal-analytics</a>	Drafting	Market comparison	Bloomberg Law Deal Analytics offers two tools: "The Deal Analytics: Equity Offerings provides over 25 searchable fields with the best available information concerning over 175,000 worldwide equity offerings. The Deal Analytics: M&A tool provides over 25 searchable fields with the best available information on over 720,000 public and private M&A deals and venture capital deals from around the world."	Cloud
Deal Point Data	<a href="https://www.dealpointdata.com/">https://www.dealpointdata.com/</a>	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
FactSet	<a href="https://www.factset.com/products/legal">https://www.factset.com/products/legal</a>	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	<a href="https://www.intelligize.com/">https://www.intelligize.com/</a>	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	<a href="https://www.srsacquiom.com/marketstandard/">https://www.srsacquiom.com/marketstandard/</a>	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	<a href="https://pitchbook.com/">https://pitchbook.com/</a>	Drafting	Market comparison	Pitchbook offers "the information you need when you're consulting on a deal, including precedent transactions."	Cloud
(Bloomberg Law) Practical Guidance	<a href="https://www.bloomberglaw.com/help/transactional-intelligence-center/practical-guidance">https://www.bloomberglaw.com/help/transactional-intelligence-center/practical-guidance</a>	Drafting	Market comparison	Bloomberg Law Practical Guidance offers "collection of forms, drafting guides, timelines, checklists, comparison surveys, overviews, and other documents dealing with corporate transactions, corporate governance, commercial transactions, and corporate compliance."	Cloud
(Lexis) Practical Guidance	<a href="https://advance.lexis.com/open/practice-advisor-home">https://advance.lexis.com/open/practice-advisor-home</a>	Drafting	Market comparison	Lexis Practical Guidance offers "task-based guidance, annotated templates and clauses, checklists, trackers and training materials; as well as tools for automated forms, M&A deal data and analytics, and state law comparisons."	Cloud
Practical Law	<a href="https://legal.thomsonreuters.com/en/products/practical-law">https://legal.thomsonreuters.com/en/products/practical-law</a>	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
(Bloomberg Law) Precedent Documents	<a href="https://www.bloomberglaw.com/help/transactional-intelligence-center/precedent-documents-overview">https://www.bloomberglaw.com/help/transactional-intelligence-center/precedent-documents-overview</a>	Drafting	Market comparison	Bloomberg Law's Precedent Database offers "access to over 1.5 million legal documents used in transactions and filed with the Securities and Exchange Commission through EDGAR that have been analyzed and classified by document type, clause title (clause search only), keyword, date, transaction type, governing law, Standard Industrial Classification ("SIC") industry, party, law firm, and attorney."	Cloud
Wolters Kluwer Transactional Law Suite	<a href="https://www.wolterskluwer.com/en/solutions/transactional-law-suite">https://www.wolterskluwer.com/en/solutions/transactional-law-suite</a>	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	<a href="https://www.litera.com/products/legal/change-pro/">https://www.litera.com/products/legal/change-pro/</a>	Negotiating	Document comparison	Change-Pro offers a "comprehensive comparison of every element in your Word, PowerPoint, Excel, and PDF files."	Installed
Draftable	<a href="https://draftable.com/">https://draftable.com/</a>	Negotiating	Document comparison	Draftable offers to "compare PDF, Word, PowerPoint & Excel documents side by side on your computer"	Cloud or Installed
Litera Compare	<a href="https://www.litera.com/products/legal/litera-compare/">https://www.litera.com/products/legal/litera-compare/</a>	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	<a href="https://avvoka.com/">https://avvoka.com/</a>	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
Clod	<a href="https://www.chsd.com/">https://www.chsd.com/</a>	Negotiating	Negotiation platform	Clod offers to "simplify collaboration between stakeholders, secure documentation, automate time-consuming manual tasks and accelerate your deals."	Cloud
dealcloser	<a href="https://dealcloser.com/">https://dealcloser.com/</a>	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
DocJuris	<a href="https://www.docjuris.com/">https://www.docjuris.com/</a>	Negotiating	Negotiation platform	DocJuris offers "an internal contract negotiation workspace that runs comparisons automatically together with insights against your playbook, checklist, and more."	Cloud
HighQ	<a href="https://legal.thomsonreuters.com/en/products/highq">https://legal.thomsonreuters.com/en/products/highq</a>	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, FISPS 140-2 Level 3, Cyber Essentials Plus, CSA STAR, HIPAA, GDPR; Integrations with Kira Systems, LEVERTON, Luminance, Neota Logic and RAVN
Juro	<a href="https://juro.com/juro-for-legal">https://juro.com/juro-for-legal</a>	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	<a href="http://www.legatics.com/">http://www.legatics.com/</a>	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

## Directory of M&A Technologies

Technology Name	Website	Category	Subcategory	Description	Configuration and Integrations
Litera Transact	<a href="https://www.litera.com/products/legal-transaction-management/">https://www.litera.com/products/legal-transaction-management/</a>	Negotiating	Negotiation platform	Litera Transact 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
Parley Pro	<a href="https://parleyp.com/">https://parleyp.com/</a>	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
ProDeal	<a href="https://prodeal360.com/">https://prodeal360.com/</a>	Negotiating	Negotiation platform	ProDeal offers the ability to "replace email chains, conference calls, and data rooms with a lightning-fast document and workflow management platform, adding security, organization, and visibility to your deals."	Cloud
ScribeStar	<a href="https://scribestar.com/">https://scribestar.com/</a>	Negotiating	Negotiation platform	ScribeStar offers "a digital ecosystem for managing complex documentation associated with listings and the ongoing compliance of securities in capital markets, digitizing pre-trading and post-trading processes in the issuance of securities using structured content and data."	Cloud - ISO 27001, Cyber Essentials Plus
Adobe Sign	<a href="https://acrobat.adobe.com/us/en/sign.html">https://acrobat.adobe.com/us/en/sign.html</a>	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	<a href="https://www.docusign.com/">https://www.docusign.com/</a>	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	<a href="https://www.camscanner.com/">https://www.camscanner.com/</a>	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	<a href="https://www.closingfolders.com/">https://www.closingfolders.com/</a>	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	<a href="https://www.litera.com/products/legal-transaction-management/">https://www.litera.com/products/legal-transaction-management/</a>	Closing	Closing management	Litera Transact 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
SetBuilder	<a href="https://www.netdocuments.com/products/real-time-messaging/SetBuilder">https://www.netdocuments.com/products/real-time-messaging/SetBuilder</a>	Closing	Closing management	SetBuilder offers to "remove the manual and tedious task of building document sets for everyone in your organization, whether it's 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	<a href="https://simplyagree.com/">https://simplyagree.com/</a>	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 HighQ, DocuSign, iManage and NetDocuments - SOC 2 Type II
Carta	<a href="https://carta.com/">https://carta.com/</a>	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
LTSE Equity	<a href="https://equity.lse.com/">https://equity.lse.com/</a>	Organization	Capitalization table management	LTSE Equity describes itself as "a full-lifecycle cap table management solution for planning, managing, and collaborating on startup equity."	Cloud
Shareworks	<a href="https://www.shareworks.com/">https://www.shareworks.com/</a>	Organization	Capitalization table management	Solum "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	<a href="http://www.brightleaf.com/">http://www.brightleaf.com/</a>	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
Coda	<a href="https://coda.io/">https://coda.io/</a>	Organization	Knowledge management	Using Coda docs "as your knowledge management system means everything from strategy to schedules lives in one place, neatly organized in folders and nested pages, so your company's critical information will never live and leave with any one person."	Cloud
ContractStandards	<a href="https://www.contractstandards.com/">https://www.contractstandards.com/</a>	Organization	Knowledge management	ContractStandards website says "our platform allows organizations to consolidate contracts, standardize language, and create and manage templates intelligently."	Cloud
Eigen Technologies	<a href="http://www.eigentech.com/">http://www.eigentech.com/</a>	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 2301
iManage RAVN	<a href="https://imanager.com/products/insight/">https://imanager.com/products/insight/</a>	Organization	Knowledge management	Manage 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
Asana	<a href="https://asana.com/">https://asana.com/</a>	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 Enterprise Legal Management	<a href="https://elevateservices.com/elm/">https://elevateservices.com/elm/</a>	Organization	Project Management	Cael Enterprise Legal Management 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
Dashboard Legal	<a href="https://dashboardlegal.com/">https://dashboardlegal.com/</a>	Organization	Project Management	Dashboard Legal offers the ability to "record the project management benchmarks of a case or transaction, open communication channels, and create universal views of responsibilities and progress to increase visibility and accountability across your team."	Cloud
HighQ	<a href="https://legal.thomsonreuters.com/en/products/highq">https://legal.thomsonreuters.com/en/products/highq</a>	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, Lumiance, Neota Logic and RAVN
Jira	<a href="https://www.atlassian.com/software/jira">https://www.atlassian.com/software/jira</a>	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	<a href="https://www.microsoft.com/en-us/microsoft-365/project/project-management-software">https://www.microsoft.com/en-us/microsoft-365/project/project-management-software</a>	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
Monday.com	<a href="https://monday.com/">https://monday.com/</a>	Organization	Project Management	Monday.com offers the ability to "plan, organize, and track all of your team's work in one place."	Cloud - AICPA SOC 2, ISO 27001, ISO 27017, ISO 27701, ISO 27018, ISO 27032, CSA STAR
OpenProject	<a href="https://www.openproject.org/">https://www.openproject.org/</a>	Organization	Project Management	OpenProject offers "timeline project management you can use to schedule your tasks and visualize the required steps to complete your project. See the progress, who is working on which tasks and what tasks have an approaching deadline."	Cloud
Smartsheet	<a href="https://www.smartsheet.com/">https://www.smartsheet.com/</a>	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
StructureFlow	<a href="https://www.structureflow.co/">https://www.structureflow.co/</a>	Organization	Project Management	StructureFlow offers the ability to "quickly create, edit and share digital, data-rich, diagrams of corporate structures & transactions."	Cloud - ISO 27001, Cyber Essentials Plus
Trello	<a href="https://trello.com/">https://trello.com/</a>	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	<a href="http://www.basecamp.com">www.basecamp.com</a>	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	<a href="https://www.hubshare.com">https://www.hubshare.com</a>	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

## Directory of M&A Technologies

Technology Name	Website	Category	Subcategory	Description	Configuration and Integrations
ndThread	<a href="https://www.netdocuments.com/products/real-time-messaging/ndThread">https://www.netdocuments.com/products/real-time-messaging/ndThread</a>	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
Notion	<a href="https://www.notion.so/">https://www.notion.so/</a>	Organization	Collaboration	Notion offers to "connect teams, tools, and information so you can execute together, faster."	Cloud or On Premise
Slack	<a href="https://slack.com/">https://slack.com/</a>	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
TAP Workflow Automation	<a href="https://mitratech.com/products/workflow-automation-tap/">https://mitratech.com/products/workflow-automation-tap/</a>	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	<a href="http://www.autto.io/">http://www.autto.io/</a>	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	<a href="https://www.berkeleybridge.com/expertsystems/">https://www.berkeleybridge.com/expertsystems/</a>	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	<a href="https://www.bryter.io/">https://www.bryter.io/</a>	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
Checkbox	<a href="https://checkbox.ai/solutions/law-firm-solutions/">https://checkbox.ai/solutions/law-firm-solutions/</a>	Organization	Experience automation	Checkbox allows attorneys to use its "no code drag-and-drop app builder to build their own legal automation software, enabling them to automate their law firm operations."	
Kim Technologies	<a href="http://ask.kim/">http://ask.kim/</a>	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	<a href="https://www.neotalogic.com/">https://www.neotalogic.com/</a>	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 provide analysis & 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

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