



ActiveDocs serves thousands of users through the Cloud, Document-as-a-Service, offering of Cleary Hoare Solicitors.



DOCUMENT AUTOMATION SOFTWARE

[www.activedocs.com](http://www.activedocs.com)



“Cleary Hoare’s customers can create and receive their highly complex legal documents within minutes instead of days and enjoy the convenience of payment by credit card.”

Cleary Hoare Solicitors is a boutique legal firm specializing in tax law. In addition, it provides legal advice to more than 1,200 Australian Accountants, Tax Advisors and Financial Planners. Cleary Hoare wanted to improve their services and make it possible for their customers to receive full-service, accurate, and up-to-date legal documents on demand.

The ActiveDocs Cloud document automation solution allows Cleary Hoare to turn their expert knowledge of law into intelligent ActiveDocs Templates which are in turn presented as simple questionnaires through a web portal. Cleary Hoare’s customers can create and receive their highly complex legal documents within minutes instead of days and enjoy the convenience of payment by credit card.

**THE SOLUTION**

generate high value, high sensitivity legal documents on demand. Such documents are typically very complex,

requiring artificial intelligence and decision making to be incorporated in the ActiveDocs Templates to make sure that only the correct and relevant clauses and other content are used. The documents must not only reflect the customer’s legal environment, but also the specifics of every case, determined by parameters that the client specifies at the time the document is requested.

Thanks to the scalability and customizability of the ActiveDocs Cloud solution, Cleary Hoare can cater for their customers during the peaks and troughs of demand without diminishing the customer experience or dedicating unnecessary resources.

ActiveDocs makes it possible for Cleary Hoare to provide an unparalleled customer experience. Customized, highly complex legal documents can be created and delivered to the customer in minutes instead of hours or days, and customers simply pay via credit card through the same web interface that the documents were created from.

**CUSTOMER**

Cleary Hoare Solicitors

**INDUSTRY**

Law/Legal

**CHALLENGE**

Provide accurate and comprehensive legal documents on-demand to thousands of financial advisors.

**SOLUTION**

ActiveDocs Cloud solution providing Documents-as-a-Service.

**BENEFITS**

Cloud deployment of ActiveDocs; in-built support for billing; highly functional, yet easy, design of templates, allowing legal experts to create templates of legal documents, not requiring coding specialists with in-depth IT knowledge.

ActiveDocs provides comprehensive support for billing and Cleary Hoare can define the value of each billable unit.

## THE BENEFITS

The large scale Document-as-a-Service solution could be deployed rapidly and ActiveDocs made it easy for Cleary Hoare's legal experts to create sophisticated templates embedding artificial intelligence that evaluates every specific case. The location of the customer, legal entity type, and many other parameters are used to determine the exact wording or to select the correct clauses. There was no need to involve the IT department in the template design process. In addition, ActiveDocs takes care of new user registration and management, providing a well-rounded Cloud solution.

The final essential part of this Document-as-a-Service deployment was easily-managed and easily-handled billing. ActiveDocs allows Cleary Hoare to define the billing parameters with exceptional precision and flexibility and the service allows the customer to pay for the generated documents using their credit card, thus fully automating the whole legal document generation process. ActiveDocs reporting is used for monitoring and auditing purposes.

## HOW IT WORKS

Cleary Hoare customers who want to generate legal documents go to the Cleary Hoare website, into the Legal Resource Club® section, where they can log in or register to use the Document-as-a-Service solution. The customer chooses the type of

document they want to generate and provides the specific details via a context-sensitive dynamic questionnaire generated automatically by ActiveDocs.

The provided information is evaluated by artificial intelligence embedded in the ActiveDocs Template so that the correct legal clauses and other content are included, and non-relevant content is excluded. The exact wording is adjusted automatically if the case parameters require it.

Customers can download their legal documents once their credit card payment is successfully received, a process which is supported by ActiveDocs billing module.

The presentation, handling, and billing of the legal document creation processes are fully automated and do not require any involvement of Cleary Hoare personnel.

## KEY FEATURES

*ActiveDocs Cloud solution* deployment with exceptional scalability and performance.

*Support for automated billing* to set prices for the services and enable credit card billing.

*Input parameter evaluation* by artificial intelligence included in ActiveDocs Templates to create documents that are customized, accurate, and complete for every specific case.

*Template Management and Compliance Auditing* to support legal compliance and ease legal clause maintenance.

### COMPANY

Cleary Hoare Solicitors

### HEADQUARTERS

Brisbane, Australia

### FOUNDED

1981

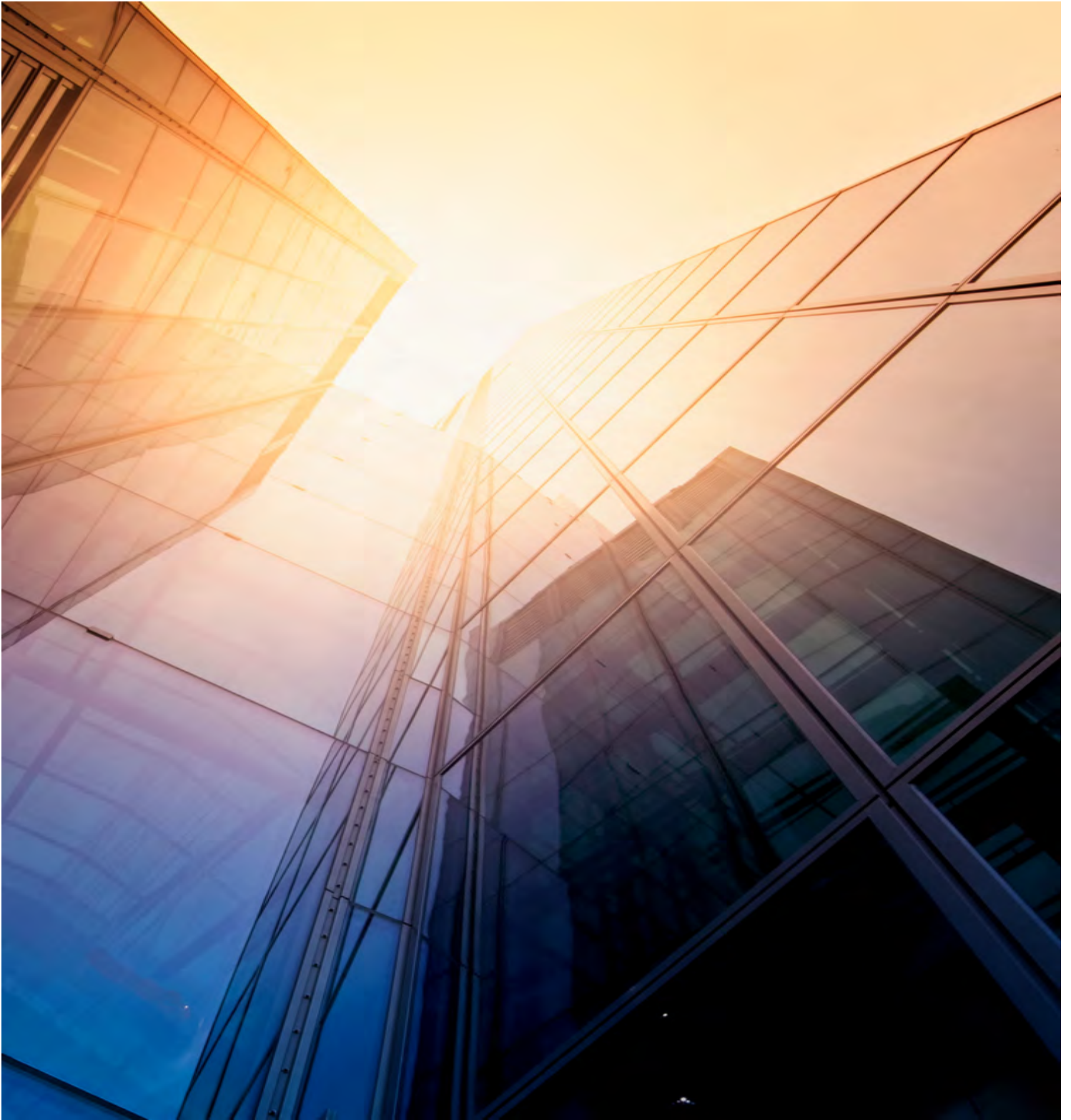
### URL

[www.clearlyhoare.com](http://www.clearlyhoare.com)

### PRIMARY BUSINESS

Legal, Tax law





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