

Generis CARA

Founded 2002 | HQ Sarasota, FL | >50 employees (est.) | <\$20M revenue (est.)

Generis CARA is a well-known brand within the pharmaceuticals sector, where it competes head-on with Veeva. Outside of that niche, CARA has little visibility. Even so, though Generis is a relatively small company, it has a long legacy and deep levels of expertise in content management.



The Company

Generis Corp was founded in 2002 and is headquartered in Sarasota, Florida, with offices in London, Tokyo, Bielsko-Biala, and Frankfurt. The company started out providing services to enhance Documentum implementations; later it expanded to SharePoint and Alfresco. Generis created a software review-and-approval tool called ePublish that later changed its name to CARA. The company has just over 50 employees and generates most of its sales directly.



The Technology

CARA was originally developed as a replacement tool for regulated industries using Documentum, SharePoint, and Alfresco. Over the past few years, though, the firm's focus has shifted from selling enhancements to other companies' technology stacks, to building their own "intelligent" platform for content and information management.

What we first note about the platform is that it is content-services-centric, not repository-centric (though the platform does include its own repository should you wish to use it). In other words, it is content agnostic and can work with combinations of repository stores in the likes of Box, SharePoint, Alfresco, etc. It also has connections to key third-party applications like SAP, DocuSign, and Office. These are all accessed and managed via the CARA interface and powered increasingly by various artificial intelligence (AI) modules.

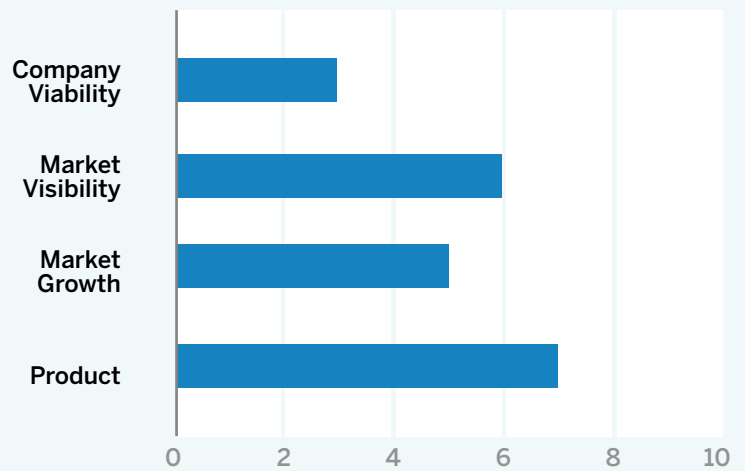
As might be expected, the CARA interface draws on its long legacy and typically delivers a significant improvement over the user experience of the repositories it connects to. What is more interesting, and the focus of this report, is the use of AI. Though Generis is still in the early stages of rolling out these modules, what we have seen to date is quite impressive, particularly for their practicality in the workplace. The focus appears to be on usability and functionality (i.e., customer needs) rather than overselling the excitement of AI-enabled

content management. The first two modules are CARA Assistant, a chatbot enabling a user to type in and trigger a workflow, and The Librarian, a module for auto-categorizing content and managing metadata. The goal with The Librarian is to index all of a customer's content (regardless of where it resides) using Lucene-based Elasticsearch technology into a CARA-specific instance of a database. The AI modules can then mine this database for insights and actions.

Though CARA has always been capable of automatically adding metadata to poorly labeled new content, AI boosts this capability considerably. Moving forward with AI, it now can trawl older data stores to clean them and make them actionable, and extend the metadata to meet new and changing criteria on the fly. To do this, Generis has built its own customized machine-learning algorithm to meet the specific needs of clients in highly regulated environments, although it also (as others do) makes use of open source and third-party AI systems. As of today, CARA does not leverage deep learning AI, which in our opinion is a good thing.¹

The company expects to release more AI modules, called The Writer, The Curator, and The Translator, in 2020.

Figure 1
Generis CARA Assessment



Our Opinion

Generis CARA is a well-known brand within the pharmaceuticals sector, where it competes head-on with Veeva. Outside of that niche, CARA has little visibility. Even so, though Generis is a relatively small company, it has a long legacy and deep levels of expertise in content management. Most of its sales to date have come via word of mouth, and only recently has the firm begun to expand its sales efforts and find traction in other sectors. The broader industry move to content-services-specific over repository-specific ECM systems plays well for Generis, and their practical and customer-centric approach to developing the new platform could see their visibility and reach grow steadily over the coming years.

Figure 1 shows our assessment of Generis CARA across four categories.

Advice to Buyers

Those in pharma and life sciences considering a new or improved approach to ECM should consider CARA on any shortlist. Firms in other regulated sectors may also want to consider CARA as a pragmatic and low-risk approach to exploring more automation and the use of AI for content management. Due to Generis' deepening relationship with Box, those in regulated sectors using the Box platform should also take a serious look at CARA.

SOAR Analysis

Strengths

- Long experience in regulated content management
- Early leverage of AI
- Ability to manage multiple repositories

Aspirations

- Expand beyond core in pharma
- Compete more successfully against Veeva
- Leverage AI extensively in regulated workplaces

Opportunities

- Automation of currently manual activities
- Future use of voice and translation
- Become a leader in content services

Results

- 400,000 users worldwide
- Growing footprint in government
- Growing footprint in oil & gas

Endnotes

1 See our Analyst Note, "Enterprises Beware of Deep Learning," at <https://www.deep-analysis.net/enterprises-beware-of-deep-learning/>.

About Deep Analysis

Deep Analysis is an advisory firm that helps organizations understand and address the challenges of innovative and disruptive technologies in the enterprise software marketplace.

Its work is built on decades of experience in advising and consulting to global technology firms large and small, from IBM, Oracle, and HP to countless start-ups.

Led by Alan Pelz-Sharpe, the firm focuses on Information Management and the business application of Cloud, Artificial Intelligence, and Blockchain. Deep Analysis recently published the book "Practical Artificial Intelligence: An Enterprise Playbook," co-authored by Alan and Kashyap Kompella, outlining strategies for organizations to avoid pitfalls and successfully deploy AI.

Deep Analysis works with technology vendors to improve their understanding and provide actionable guidance on current and future market opportunities.

Yet, unlike traditional analyst firms, Deep Analysis takes a buyer-centric approach to its research and understands real-world buyer and market needs versus the "echo chamber" of the technology industry.

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About the Author

Alan Pelz-Sharpe is the founder of Deep Analysis. He has over 25 years of experience in the IT industry, working with a wide variety of end-user organizations like FedEx, The Mayo Clinic, and Allstate, and vendors ranging from Oracle and IBM to start-ups around the world. Alan was formerly a Partner at The Real Story Group, Consulting Director at Indian Services firm Wipro, Research Director at 451, and VP for North America at industry analyst firm Ovum. He is regularly quoted in the press, including the *Wall Street Journal* and *The Guardian*, and has appeared on the BBC, CNBC, and ABC as an expert guest.