

Price Bailey Improves Control of Client Files with iManage

Intuitive, User-Friendly System Streamlines Storing and Retrieving Documents and Email for Leading U.K.-based Accounting Firm



Industry:

- Accounting
- Business Advisory Services

Challenges:

- Make it easier for professionals to save and retrieve email messages and other documents
- Streamline access to client files from multiple office locations
- Improve visibility into complete client engagement

Solutions:

- Centralized work product management solution from iManage
- Easy deployment
- User-friendly
- Integrates seamlessly into users' workflows
- Enforces data governance and security requirements

Price Bailey is a leading firm of chartered accountants and business advisers. The company serves 8,500 regional, national and international clients through eight offices in the English cities of London, Bishop's Stortford, Ely, Cambridge, Norwich; as well as the Channel Islands and the Caribbean. Each office serves local small and mid-sized enterprises, private clients, and regional, national, and international businesses. With 27 partners and more than 310 professional and support staff, Price Bailey offers consultancy and planning skills to complement traditional accounting, tax and financial services.

Challenge

Control Complete Client Files from a Centralized System

With its large professional staff serving thousands of corporate, small business and private individual clients from multiple international offices, Price Bailey found it difficult to manage its millions of client files. Price Bailey sought a user-friendly system that would enable control of complete client files that could be accessed from all offices.

“We had an exhaustive checklist of key features and functionality we needed in an engagement-centric solution for storing and retrieving documents. We took a close look at iManage and found that it ticked every one of our checkboxes.”

— Paul Chipperfield, IT Systems Development Director, Price Bailey

Solution

iManage Simplifies and Secures Document and Email Management

Decision makers at Price Bailey observed that another respected U.K.-based firm had successfully deployed a solution from iManage, leading them to a careful assessment of the iManage technology for themselves.

Benefits:

- Firmwide deployment, including all practice areas and functions
- Enables control of a complete client file for all documents and emails
- Centralized client file can be accessed from all offices
- Easy-to-use system drives user adoption
- Search across all project-related communications and content

Product:

- iManage Work

About iManage

iManage is the leading provider of work product management solutions for legal, accounting and financial services firms and the corporate departments they serve worldwide. Every day iManage helps professionals streamline the creation, sharing, governance and security of their work product. Nearly 3,000 organizations around the world — including more than 1,800 law firms — rely on iManage to help them deliver great client work. Headquartered in Chicago, iManage is a management-owned company.

Learn more at
iManage.com/products

Company leaders wanted a centralized solution that would be as easy to use as today's consumer applications, while satisfying essential data governance and security requirements. *"We needed a solution that would integrate seamlessly into users' workflow,"* Chipperfield continued. *"We knew our professionals would be more likely to adopt a new system if it fitted the way they work."*

Price Bailey made the decision to implement iManage Work. Firm wide deployment was quick and easy. *"Users left our old system on a Friday and began using iManage on Monday,"* Chipperfield said. *"Two weeks of training prior to deployment helped users understand the solution."*

Today, all of Price Bailey's 310 professionals use iManage to easily store and retrieve more than six million documents and email messages. iManage is deployed to all practice areas and functions of the business. With it, users can control complete client files for all documents and emails. Centralized client files can be accessed from all offices to streamline collaboration and sharing.

Benefit

iManage has empowered Price Bailey to regain control of its client files. Because the previous system was difficult to use, client files were incomplete and uncontrolled. iManage eliminated this problem by providing users with an easy way to consolidate communications and content into unified workspaces.

iManage enables users at Price Bailey to easily regulate client folder structures. It enforces rules that help eliminate rogue one-off folders that professionals may be tempted to create for a single isolated task. Emails that were typically isolated in individual in-boxes are now part of the shared and governed engagement file. Users can navigate to engagement files directly from Microsoft Outlook or the Windows desktop.

"iManage completely changed the way our professionals save content," Chipperfield said. *"It plugged a leak in our document stores by making it easy for people to use appropriate filing habits. That improves productivity and saves valuable billable time."*

iManage supports Price Bailey's One Practice initiative, which was initially deployed using Citrix to manage client files across the firm for all offices. iManage integrates seamlessly with that environment. *"iManage helps us maintain a unified practice,"* Chipperfield explained. *"It also helps us build a more comprehensive view of each client. Our professionals can easily search across all project-related communications and content. Rolling out iManage to our entire international user base was as easy as simply installing it on our Citrix servers."*

Users at the firm say the new system is very easy to use. For example, one Price Bailey advisor reported that the system was so intuitive that he was able to file two years of email messages in a single evening during the first week with iManage. Ease of use ensured rapid adoption throughout the firm.

"It is usually difficult to change user behavior, but it was easy to get people to start using iManage," Chipperfield concluded. *"The system is so simple. We show users how to file the first few, and then the system guides them from there. It learns users' filing habits and suggests appropriate locations for them to file content. Our professionals want to provide excellent personalized service and are concerned about their billable time. They don't want to worry about cumbersome filing procedures. Now that we use iManage, they don't need to."*