

Legat Owen Uses iManage Work to Streamline Digital Assets, Increase Efficiency and Remain Regulatory Compliant

Unused Asset Turns into a Competitive Advantage



Industry:

- Commercial Property Consultancy

Challenges:

- Instead of all being stored together in filing cabinets, vital information was contained in employee email
- The value of this information could only be realized if staff could get to it easily and quickly
- Wanted to consolidate all work product management into a single, integrated system – streamline their digital assets

Legat Owen Chartered Surveyors are a North West based commercial property consultancy who have an enviable customer base that spans the UK. From its beginnings in 1986, Peter Owen and his team have built up the business to offer advice across a whole spectrum of commercial property that includes retail, industrial premises, offices, leisure and land.

Challenge

Like many firms, the business has seen a radical change in the way day-to-day business is carried out. When Peter Owen started Legat Owen, business communications revolved around letters and the phone, and every job's associated paperwork was physically stored in a filing cabinet. As email became the "new" manner in which to communicate with clients and other parties, it became more difficult to get a complete and full picture of each job. Because emails were stored on individual PCs, finding the latest details of a particular job meant hunting through Outlook. Worse still, if someone was away or had left the business, it made this task more difficult. In Peter's words, *"We were bogged down by emails."*

"Looking back it is not difficult to imagine the chaos that would now exist in terms of finding, storing and referencing all our communications and data if we had carried on without the implementation of document management system. It would have affected the progress and profitability of the business."

— Peter Owen, Co-founder, Consultant

Solutions:

- Deployed iManage Work
- iManage Work enables them to manage and access all documents, emails and other communications streams in a single project-specific workspace
- iManage Work enables employees to search across all project-related communications and content

Benefits:

- Information that had been confined to one department is now available across the company
- As regulations grow ever more complex, the business is now much easier to audit
- Enables them to stay a step ahead of their competitors

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.

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Legat Owen had a wealth of accumulated knowledge that was a valuable but underused asset. For instance, they had an unmatched library of surveys, rent reviews, lease renewals, ratings and valuations. The value of this information could only be realized if staff could get to it easily and quickly. Peter knew he needed an IT system that would open up this value, *“I spent quite a lot of time looking at document management systems. We had some trials, but the products didn’t seem to work so well.”*

Peter then evaluated iManage Work and immediately saw the benefits and possibilities that the technology could deliver for the business.

Solution

iManage Work – A new way of working smarter

It was important for Peter that the document management system chosen matched the scale and ambition of Legat Owen. He worked with Tiger Eye Consulting to find the right match with iManage Work, a complete work product management system. Tiger Eye took time to understand the business issues, the right work product management system was installed and customized to give Legat Owen a solution that now enables all staff to file all their emails and other related digital assets in a way that can be accessed across the entire business. As all content is held in one central location, information surrounding any aspect of a job can be found and acted upon both quickly and easily.

iManage Work enables Legat Owen to make better, more informed decisions and improve efficiency with a single view into all project-related communications and content. They can now view relevant work product in context, rapidly create and revise documents, and collaborate with colleagues — all within a single, project-specific workspace that’s securely accessible from anywhere, on any device.

Benefit

Having a reliable email and document management system is vital for a business like Legat Owen. However, a key benefit of the solution is that now, with the system in place, the wealth of information in the business is now available to all staff, and within just a few moments. Peter Owen says, *“Instead of information being solely referenced within, say, our industrial department or in retail, we now all have access to it across the whole firm.”* This has turned an underused asset collection into real commercial advantage for Legat Owen.

Peter also points out that as regulations grow ever more complex, there are other advantages to having a DMS. *“From a regulation point of view, if our processes are audited, we now have a filing and reference system which is comprehensive, effective and totally systemized. That helps a lot!”*

Legat Owen knows that whilst results from a project like this are often difficult to quantify, they see a significant difference to the way the company now operates. *“We have always tried to stay ahead of the game and invest in IT. I think we have a real competitive advantage,”* said Peter.