

UK Law Firm Chooses iManage Work for Reliability and Ease of Use

Successfully Migrates 2.5 Million Documents



Challenges

- Shepherd & Wedderburn acquired Tods Murray who was using NetDocuments
- Needed to decide which software better met its users needs
- Wanted to consolidate all work product management into a single, integrated system

Solution

- Selected iManage Work for work product management
- Selected iManage Work for its reliability, integrated functionality and ease of use
- iManage Work manages all documents, emails and other communications within a single workspace that's securely accessible from any device
- Seamlessly integrates with Microsoft Office, Outlook as well as other third party technologies

Shepherd and Wedderburn traces its history back to 1823 and today is a leading UK law firm. With offices in Edinburgh, Glasgow, London and Aberdeen, Shepherd and Wedderburn has 81 partners, a staff of more than 500 and advises clients around the globe. Key focus areas for the firm include Real Estate and Infrastructure, Energy and Natural Resources and Financial and Banking industries.

Challenge

Following its acquisition of Scottish law firm Tods Murray last year, Shepherd and Wedderburn faced a challenge common to many businesses that need to integrate new assets into their operations — determining which existing technologies would ultimately best serve the interests of the organization moving forward. This was an especially important consideration when it came to a system for managing work product, which is the lifeblood of any professional services firm.

“In IT, we usually don’t get much user feedback unless there’s an issue. The fact that I didn’t hear a single complaint after moving lawyers from one system to another and transferring more than 2.5 million active documents in a few days speaks for itself. The implementation was exceptionally smooth.”

— **Paddy Toner, IT Director for Shepherd and Wedderburn**

“Efficient and secure document management is integral to the work we do day in and day out for our clients,” says Lynn Beaumont, Head of Quality at Shepherd and Wedderburn. “It is critical for us to have a system in place that’s reliable and that also helps our lawyers produce high quality work. The main objective is to make their jobs easier.”



Benefits

- Lawyers can more easily stay organized and manage their work through a central, integrated workspace
- Easier for firm to organize documents for regulatory compliance and control quality of work
- Firm as a whole is more productive and efficient in meeting client needs

Products

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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Tods Murray was previously running the cloud-based NetDocuments and Shepherd and Wedderburn was already using iManage Work. The firm wanted to consolidate all work product management into a single, integrated system — a task that would ultimately involve the migration of millions of documents and the training over 100 new users on the chosen solution. Once a decision was made, Shepherd and Wedderburn's next objective was to ensure that the conversion to a central, firm-wide solution would be as seamless and non-disruptive to client service as possible.

Solution

The Choice: iManage Work

Shepherd and Wedderburn selected iManage Work as its go-forward system for work product management for a number of reasons, including reliability, integrated functionality and ease of use.

iManage Work is designed to help users manage all documents, emails and other critical communications within a single workspace that's securely accessible from any device. Shepherd and Wedderburn especially liked the fact that iManage seamlessly integrates with Microsoft Office, Outlook as well as other third party technologies like ethical walls and financial systems, making it simple, intuitive and painless for lawyers to find and file information.

A Fast Implementation

The successful migration to iManage, which involved documentation concerning approximately 15,000 live matters, was handled by iManage partner Ascertus Limited, a professional services firm with a proven track record converting existing NetDocuments systems. Ascertus completed the migration in a single weekend. More than 100 new users were trained on iManage Work, and since the conversion, response to iManage's integrated workspace has been positive. Additionally, the firm will integrate iManage with third party solutions such as ethical wall and financial systems with work product management.

Benefits

#1 Objective Met: Lawyers are Happy

No matter how available, reliable or integrated a work product management system is, it also has to make sense to the professionals who will use it. Shepherd and Wedderburn's primary objective in rolling iManage out firm-wide was to provide an environment that would help the firm's lawyers manage their work more efficiently and securely, and ultimately better serve their clients. In this, the firm has achieved its objective — the lawyers are happy and so is IT, which is the best possible outcome.

"iManage is much more intuitive and user-friendly, and it enables lawyers at the firm to be more productive," said Hamish Patrick, a partner at the Shepherd and Wedderburn. *"Everything is more integrated, so people don't have to click in and out of multiple windows to do their work or to search for information on open matters. Automatically filing documents direct from Outlook is a huge plus — it's much faster and simpler than manually transferring information from email to the DMS."*