Matter Centricity Helps Taft Stettinius & Hollister Enhance System Adoption

Taft Manages all Content and Communication by Matter, in a Single, Integrated Electronic Folder – with a 70% Attorney Adoption Rate

Industry:

- Legal

Challenges:

- Meeting the demands of the new professional
- Managing multiple organizational mergers
- Keeping up with changing client demands and how users want to work

Solutions:

- Review/adjust data management system organization on a regular basis
- Centralize and modernize hardware infrastructure
- Move to the newest version of iManage Work

Founded in 1885, Taft Stettinius & Hollister is one of Cincinnati's largest law firms with offices in 8 cities and over 400 lawyers. The firm practices across a wide range of industries, in virtually every area of law, including Business and Finance, Litigation, Labor and Employment, Intellectual Property, Business Restructuring, Bankruptcy and Creditor Rights, Environmental, Health and Life Sciences, Private Client Services, Real Estate and Tax.

Challenge

With multiple organizational mergers that doubled the size of his firm in 10 years, Taft CIO Brian Clayton needed a way to manage his growing firm's content and communications, all while exceeding expectations of the "new professional" users – the ones that are always connected, mobile, impatient, and with the knowledge and understanding of how to use technology. The new professional demands new ways of doing work, while at the same time, the new client is demanding new economics and greater agility.

> "We are really focused on matter centricity as more of a lifestyle than a product push by IT – somewhat like a diet or exercise program."
>
> — **Brian Clayton, Taft CIO**

Benefits:

- Increased engagement by users – 70% adoption rate
- Reduced operational costs
- Addressed high value areas such as mobility/remote work
- Integrated email management – accounting for users spread over four acquisitions

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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Moving from a decentralized to a centralized architecture, needing to reduce cost of ownership and wanting to invest in one highly optimized environment with current software, Brian needed to take a good hard look at their workspaces, how users want to work and evolving client demands. The company needed a way to completely refresh, and to do so on an on-going basis so Brian set about finding the most effective solution.

Solution

Refreshing the iManage Implementation on a Regular Basis

The initial iManage implementation took place in 2006. Brian oversaw the migration from Worldox and implemented a drastic simplification of their file/folder structure with template types specific to each practice area.

But in a period of about six years starting in 2008, the firm doubled in size through four separate mergers. Each merger was reason for revisiting the data management system and adjusting the practice templates as new practice types came into the company, sometimes with different cultures. *"Making ongoing adjustments allows us to be more responsive,"* said Brian. *"We try to keep every refresh project under three months."*

The most recent change saw them moving away from a practice-type folder model and mapping directly to the firm's governance policy classifying items as client-owned, firm owned, or firm-generated for the client. On top of this basic structure, practices could add additional practice-specific folders. Brian stresses that; *"We stay in touch by being on the floor. We don't wait for requests to come in. We revisit the data management system every few years."*

In 2015, Taft centralized the iManage hardware implementation from across the offices providing a lower operational cost, more consistency and more efficient document searching with consolidated stores. This centralization also played a key role in helping them achieve their ISO certification.

Taft is also in the final stages of moving to the newest version of iManage Work that will provide a more modern interface, high impact features such as Smarter Suggested Filing, platform enhancements and security/communication upgrades.

Commonly, a refresh involves three steps, not necessarily taken in the same order: a review and update of the infrastructure (such as centralization), getting to a current software level, and adjusting the data management system structure to match how lawyers and the firm is functioning. The decision to leverage matter-centric collaboration was an important organizing principle for Taft. And it was not a one-time project. They continuously listen to the users – adapt, measure, then adapt again.

Benefit

Taft is pleased with the results of the iManage refresh. The company has increased their level of engagement with users aligned around matter centricity, with a 70% adoption rate, even among their most recent acquisitions.

The refresh enables Taft to more effectively address high value areas such as mobility/remote work and the need to enable agile work while maintaining governance. The refresh also enables better organization, more advanced collaboration and integrated email management, as easy email filing is a key requirement for effective matter centric collaboration at Taft.

iManage