

Work Product Management for Financial Services



BENEFITS

- **Improve productivity:** electronic workspaces integrate email documents and more in a single integrated view.
- **Improve client service:** share and collaborate securely and easily. Be more responsive from mobile devices.
- **Move from paper to digital:** improve quality, reduce costs.
- **Gain new insights:** comprehensive search and knowledge management.
- **Improve governance and security:** secure and manage all electronic and physical files in accordance with policy.

IMANAGE WORK PRODUCT MANAGEMENT

- **iManage Work:** Secure document and email management
- **iManage Share:** Secure governed file sharing and collaboration
- **iManage Insight:** Enterprise content search and analysis
- **iManage Govern:** Archiving, Records, Threat detection and Security Policy Management

Financial services professionals across asset management, investment and commercial banking and insurance create and manage mission critical information that guides some of the most important business decisions made. With increased competitive pressure and client demands, firms are looking for ways to reduce costs and increase customer satisfaction by streamlining manual processes, improving productivity, facilitating client collaboration and communications and leveraging knowledge spread throughout the enterprise.

iManage Work Product Management

iManage is a leading provider of professional work product management software used by over 3,000 firms including over 250 financial services firms.

iManage Work Product Management is an integrated solution for managing all documents, emails and other work product in a single electronic file, accessible from mobile devices and any internet connected device. Encompassing document management, email management, file sharing, collaboration, knowledge management, records management and information governance, iManage offers the most complete functionality, integration with the key tools you use today, scalable performance and enterprise grade security.

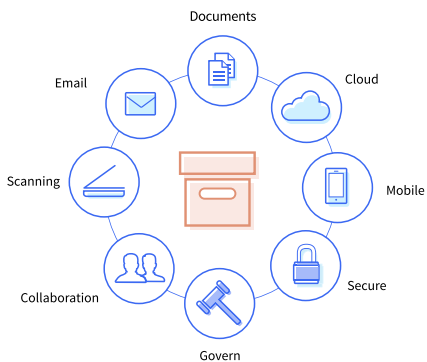
Improve productivity and client service with electronic files

Electronic filing cabinets: With iManage Work, analysts manage spreadsheets, documents emails and other work product by client and deals, in a single unified electronic file which may be viewed inside Microsoft Outlook, Gmail, Lotus Notes, MS Office, mobile phones and tablets or a web browser.

Handle the information overload with minimal user overhead: All relevant metadata is assigned as content is filed, so professionals have no forms to complete. Intelligent filing suggestions for email solve the challenge posed by high email volume.

Find what you need when you need it: Single search across email, documents, presentations, and scanned images saves professionals time, and enables better re-use of previous work product best practices.

**MANAGE ALL CLIENT WORK PRODUCT
IN SINGLE UNIFIED ELECTRONIC MATTER
FILES BY CLIENT AND ENGAGEMENT**



Access to content anywhere on any device: Mobile apps keep all information in electronic files updated on your professionals' laptops for unfettered productivity even when not connected.

Share and collaborate easily and securely with clients and partners

Securely share files and collaborate with clients directly from iManage Share. Share parts or all of project folders. Turn email attachments into secure links to a single cloud repository, reducing risk and cost of email infrastructure.

Transform information to insight

With iManage Insight you can search across SharePoint, email, shared drives, and archives to get a single enterprise wide search. You can identify otherwise hidden expertise and leverage the benefits of a large global organization. Collate "best practices" into taxonomies in order to re-use proven work product.

Reduce paper and inefficient paper processes

Scanned documents can be routed automatically to proper folders based on extracting key information. Valuable office space is saved by converting physical paper into searchable files. The iManage OCR Module turns scanned documents and email attachments into searchable knowledge.

Enhance regulatory compliance

iManage Govern enables firms to secure and govern all work product by client, deal or asset. As information is filed, the system automatically applies the appropriate governance policy. Analysts and bankers do not need to be made into records managers.

Only iManage Govern offers records management—both physical and electronic—that is fully integrated with the electronic file. This avoids the need to copy information out to a separate record system, and provides a single consistent method to apply governance policy across physical and electronic records.

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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. Over 3,000 organizations around the world—including more than 2,000 law firms—rely on iManage to help them deliver great client work. Headquartered in Chicago, IL, iManage is a management-owned company. For more information, please visit <https://imanager.com>.