



Higgs Fletcher & Mack Takes Control of Physical and Electronic Records with iManage Records Manager

Gives Law Firm Enhanced Ability Around Retention and
Defensible Disposition for all Matter Files



Industry:

- Legal

Challenges:

- Mix of physical and electronic files across firm
- Difficult to track and manage records
- No way to apply retention policies to electronic records

Solutions:

- iManage Records Manager provides an integrated solution for handling both physical and electronic records

Founded in 1939, Higgs Fletcher & Mack LLP is San Diego's oldest and most respected full-service law firm. With more than 70 attorneys in 23 practice areas, the California-based law firm excels at meeting the legal needs of individuals and businesses both locally and globally.

Challenge

Like most firms, Higgs Fletcher & Mack works with a mixture of electronic and physical files. Keeping track of records was a challenge: some files were in the electronic system; some files only existed in physical form; and other physical files were scanned electronically, but weren't filed in a uniform manner, making it difficult for the firm's professionals to find the information they needed.

"We needed a more organized approach to our records management," explained Ray Moore, IT Director at Higgs Fletcher & Mack. "It's more than just a matter of knowing where all your records are — it's also knowing how long those records need to be retained and whether or not they're eligible for disposition."

"A lot of other records products don't manage the retention aspect very well. iManage Records Manager, as we have been using it, does a terrific job. It's very smart in the way it can automate the process."

— Ray Moore, IT Director at Higgs Fletcher & Mack

Benefits:

- Enhance firm-wide compliance by automating records declaration, retention and disposition processes
- Save attorneys' time and enhance adoption of compliance initiatives through seamless integration with iManage Work
- Reduce firm risk from over-retention by managing all retention in concert with firm and client policy

Products:

- iManage Cloud
- iManage Work
- iManage Records Manager

About iManage

iManage transforms how professionals in legal, accounting and financial services get work done by combining the power of artificial intelligence with market leading information governance, document and email management. iManage automates routine cognitive tasks, provides powerful insights and streamlines how professionals work, while maintaining the highest level of security and governance over critical client and corporate data. Over one million professionals at over 3,000 organizations in over 65 countries – including more than 2,000 law firms and 500 corporate legal departments – rely on iManage to deliver great client work.

For more information, visit imanager.com



Solution

The firm had long used iManage Work — delivered as a service on the iManage Cloud — for document and email management. Working with iManage partner Younts Consulting, the firm decided to implement iManage Records Manager to help it take control of its physical and electronic records.

An industry-leading product with over 500,000 users worldwide, iManage Records Manager provides a central interface with advanced capabilities for managing all types of records, including physical files, electronic documents, and emails.

Critically, iManage Records Manager provides seamless integration with iManage Work, allowing users to find and manage all relevant records from within the familiar iManage Work interface. “We’re not a paperless firm yet, so the ability to track the circulation of physical files around the office while a matter is open is important to us,” said Moore. “Once we put those records in a box and move them offsite, iManage Records Manager does a really good job of letting us know exactly what’s in that box and what the next stage of the lifecycle is. The fact that we can use the same system to manage all records is a huge advantage. One report, for example, shows all records — physical and electronic — that are eligible for disposition. An integrated approach like this enhances records program adoption and really adds a lot of value for our professionals while keeping them productive. We like the single-vendor, integrated approach that iManage offers.”

Benefit

Beyond helping Higgs Fletcher & Mack to better track and manage its records, iManage Records Manager has also set the stage for stronger governance. Administrators at the firm can set governance policies, including trigger events, retention periods and disposition rules for both physical and electronic files.

“A lot of other records products don’t manage the retention aspect very well,” said Moore. “iManage Records Manager, as we have been using it, does a terrific job. It’s very smart in the way it can automate the process. For example, all files in a matter can be automatically declared as records and locked down. The electronic files can be moved to cheaper storage and the physical files can be boxed and moved offsite. And when the time is right, both the physical and electronic records can be approved for destruction in one operation — with a full audit trail that shows who approved the disposition and when it was carried out, and why.”

“That kind of automation around records declaration, retention, and disposition is where we’re aiming to go as a firm,” concluded Moore.