

# Pemberton Greenish Simplifies Transition from Envision with iManage

Moving to iManage Work for document management enhances firm operations and facilitates practice management system replacement



#### Industry:

- Legal

#### Challenges:

- Existing practice management system reaching end of life
- Limited document management capabilities through one of the practice management system modules
- Need to simplify future practice management system replacement by moving documents to a new document management solution

#### Solutions:

- iManage Work provides an integrated, industry-leading platform for document and email management

Based in central London, Pemberton Greenish LLP is a law firm specializing in Real Estate, Private Wealth and Corporate law. The firm has enjoyed a strong reputation for over 200 years by combining “big firm” expertise with the individual approach and personal service of a specialist firm.

#### Challenge

For many years, Pemberton Greenish successfully used Thomson Reuters Envision as its practice management system. The all-in-one system, which included a built-in document management module, was placed into maintenance mode by Thomson Reuters in 2015, with support to end by 2021. Pemberton Greenish put some careful thought into the best way to move forward.

“We were quite happy — and still are — with the accounts functionality of Envision, such as billing and time recording,” explained Michael Kinnear, IT Manager at Pemberton Greenish. “However, we felt the document management capabilities were limited. Rather than replace our practice management system all at once, we decided our first step would be to move all our documents to a new document management system. That way, transitioning to a new practice management system in the future would be much easier because the document management portion would already be complete.”

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— Michael Kinnear, IT Manager at Pemberton Greenish

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### Benefits:

- Transfer nearly half of the content out of the practice management system and into iManage Work, simplifying future practice management system upgrade
- Seamlessly migrate 2 million documents over a 4-month period
- Reduce potential downtime for fee-earners when practice management system upgrade occurs through availability of critical documents in iManage Work
- Enable fast and reliable search and retrieval of all documents and emails, enhancing current productivity levels and ability to service clients

### Products:

- iManage Work

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### 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 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](http://imanager.com)



### Solution

Pemberton Greenish began evaluating potential solutions and soon landed on iManage Work, an industry-leading document and email management platform, as the best choice.

“We knew that whatever document management system we chose needed to integrate with Envision since we will continue using Envision for accounts a while longer,” said Kinnear. “At the same time, any document management system we chose would have to integrate with whatever practice management system we moved to within the next few years. iManage has the best document management system and they integrate with every major practice management system on the market — so, really it became quite an easy decision.”

Pemberton Greenish worked with Tiger Eye Consulting to get up and running on iManage Work quickly and easily; the on-premises installation took just a few months from beginning to go-live date. The change included the migration of two million legacy documents and the migration was carried out without a hitch.

“Tiger Eye guided us at every step of the way,” said Kinnear. “First, we consolidated our existing document types and simplified our folder structures. Then, we mapped that to a new folder structure in iManage. Over the next several months, we took a very structured approach to moving our documents from Envision to iManage Work: we started with documents that hadn’t been touched in the last 12 months, then proceeded to documents that hadn’t been touched in the last 6 months, 3 months, 2 months and so on. The weekend before the go live date, we only had to move our remaining 100,000 documents instead of 2 million.”

### Benefit

The successful move to iManage Work has taken much of the burden off Pemberton Greenish with regards to the future replacement of its practice management system.

“Nearly half of what we held in Envision was our documents,” said Kinnear. “That’s a massive part of our practice management system that we don’t have to worry about moving or upgrading in the future because we’ve already successfully tackled that bit.”

In addition to simplifying the future practice management system upgrade, the move to iManage Work has minimized the potential disruption the firm might face during an upgrade.

“No law firm wants downtime,” said Kinnear. “However, all our documents and important files have already been moved into iManage and our fee-earners can keep on working even when our practice management system has downtime. They may not be able perform accounts functions like time entry or billing for a few days but they can easily continue to carry out their normal day-to-day work. As a result, the potential disruption to our business has been greatly reduced when we carry out the next phase of the project.”

In the process of moving to iManage Work, Pemberton Greenish realizes the firm gained a much better solution for document and email management.

“Our stockpile of documents, cases and emails that previously were stored in Envision can now be effortlessly searched, accessed and retrieved in iManage Work,” said Kinnear. “The system just works: Our professionals can easily file important documents and emails and know that they can quickly find them again. So, more than just preparing us for the future, iManage is enabling the firm to operate more efficiently and provide a better level of service today.”