iManage
Making knowledge work

Swanson, Martin & Bell simplifies staff and attorneys' work lives with iManage

US litigation firm solves sophisticated management requirements for 80,000 documents with the iManage knowledge work platform

SMB SWANSON, MARTIN & BELL, LLP

Industry:

- Legal

Headquarters:

- Chicago, US

iManage footprint:

- iManage Work 10 in the Cloud
- iManage Mobility
- iManage Threat Manager
- iManage Security Policy Manager

Jury trial experience is the hallmark of Swanson, Martin & Bell, a US litigation firm that provides the highest quality of legal services at a fair price. As you would expect, this area of law produces copious numbers of documents. Many years ago, after a frantic search for the latest version of a document that was ultimately unsuccessful, the firm recognized it had an unmet need for a centralized document repository with built-in version control. Document classification was another challenge. They decided to look for a document management system to meet those needs. After exploring the available options in the market, the attorneys and their newly minted Manager, Andrew Barzyk, decided that iManage offered the best solution for their specific business requirements. That decision marked the beginning of a long and fruitful partnership for both parties, and the iManage platform quickly became a critical part of the firm's success strategy.

> " One of the neat things about iManage is how they anticipate our needs. Suddenly we have this new iManage capability we didn't even know we needed, and we can't live without it.
>
> **Andrew Barzyk**
> Manager, Swanson, Martin & Bell

Business outcomes:

- Centralized repository
- Built-in version control
- Automated classification
- Evolves with your business

Swanson, Martin & Bell is a nationally recognized Chicago litigation firm. Founded in 1992, the firm's lawyers are steeped in jury trial experience and dedicated to resolving contested matters for their clients, including by trial, if necessary.

The business challenge

Central repository, classification, iron-clad version control

Access and version control were the primary drivers for adopting the first document management system the firm had ever had. Because the firm is focused on litigation, its attorneys produce a staggering number of documents, which all have to be stored in a place that is secure and accessible; handy to the attorneys on the case, naturally, but also to any other authorized person in the firm who might need it. A specific experience drew out the firm's need in sharp relief.

Imagine an attorney on a plane whose client is requesting the latest version of a document. Then a mad scramble of attorneys and paralegals in the office scouring every email, drive, share — every place this document could possibly be — until they can finally send something to the client. "That's when I said, we've got to do something about this," Barzyk recalls.

The firm realized it needed a central repository for documents, one with iron-clad versioning so they could say without a shadow of a doubt, this is the latest revision. The attorneys also wanted the ability to classify documents to make them easier to find. So, the team started exploring packages.

"For most products we looked at, you had to fill out a form when you uploaded a document: naming the author, the date, and other information that — to be honest — you would think the computer could figure out better than a human could. We had thousands of documents in some of these drive shares, so that would have been a nightmare," remarks Barzyk.

Given the volume of documents they needed to classify, he couldn't even consider a solution that did not greatly simplify that process. "Luckily, with iManage Work, it's effortless. As soon as we saw we could upload a document to a folder and all the rest was done for us in iManage, we were sold."

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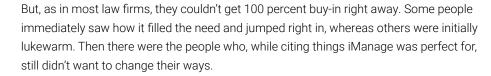
Andrew Barzyk
Manager, Swanson, Martin & Bell

The solution

iManage evolves with your business as it grows

The firm started with iManage FileSite, predecessor to iManage Work, and the attorneys could just drag and drop the documents in Outlook to upload them. "That," Barzyk says, "was a game changer."

iManage had not only the classification covered, but the versioning, too. "iManage tracks all your documents," says Barzyk, "so you have a whole rich history of that document, if it was printed, if it was emailed to someone, how it was revised, when, and by whom." He says the staff loved that feature.

But, as in most law firms, they couldn't get 100 percent buy-in right away. Some people immediately saw how it filled the need and jumped right in, whereas others were initially lukewarm. Then there were the people who, while citing things iManage was perfect for, still didn't want to change their ways.

When Barzyk heard things like, "We have too many files for the document management system," he responded with a metaphor. "Your storage method is like a banker's box. By comparison, our document management system, iManage, is a warehouse. If you have too many files for a warehouse, how will you fit them into a banker's box?"

He says the people who were in the middle initially are now advocates. "I haven't met anybody who doesn't like iManage," he observes. "Even people who came from other firms that were using different products. In fact, there are people who left our firm and convinced their new firm to get iManage because they can't live without it. I think that says a lot."

Swanson, Martin & Bell also has iManage Threat Manager, which it uses primarily to monitor the number of documents opened, what's printed, and what's emailed, for example. If emails on sensitive matters are opened by someone who wouldn't normally see them, it triggers an alert. Downloading large numbers of documents also triggers an alert, especially when someone is leaving the firm.

"iManage evolves and moves with your business as it grows." Barzyk knows, because he's been on the journey beside it for nearly two decades. "I can't tell you how many legal tech products haven't moved forward since about 1970," he notes. "But iManage stays up to date and that's a huge thing. iManage support is wonderful, too."

The business outcomes

An integral part of the firm, critical to its success

Swanson, Martin & Bell maintains a wide range of technology to enable staff to work with more than 80,000 client documents of all kinds, in all fields, in all types of media — video, tomography, x-rays, and so on.

Barzyk says, "A sophisticated document management system is essential to help us manage all of this. That's why iManage is such an integral part of the firm."

Those 80,000 documents — everything the firm's attorneys need — are in the central document repository on the iManage Cloud platform, which they can access from anywhere. People are out of the office, away from their desk, where you wouldn't normally expect to be able to pull up a document on your phone. They might want to be apprised of a trial status or where a matter is at any given moment. "Say an attorney is at court and needs to check something very quickly, during a recess," says Barzyk. "With iManage, they can, and they do. It's happened countless times, and it's been a godsend."

As a law firm, he says the firm's data systems are critical to its success. "If a client calls and the attorney can't pull a document up right away, that's a bad look. That's where your document management system can make or break you, and with iManage, ours is gold," he adds.

Looking ahead

Barzyk says one of the neat things about iManage is that they're not just talking to his firm, they're talking to all their customers. They hear all the ideas for new features, and when they develop them, everyone benefits. "We have this new iManage capability we didn't even know we needed, and suddenly we can't live without it," he quips.

He says the longer they use the platform, the more unanticipated benefits it brings. For example, "When remote working came, we needed mobility, and iManage was right there with their Mobility app, which was perfect," he recalls. "iManage has become such a critical part of the business that I honestly don't know what we would do if we didn't have it."

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Andrew Barzyk

Manager, Swanson, Martin & Bell

About iManage™

iManage is dedicated to Making Knowledge Work™. Our cloud-native platform is at the center of the knowledge economy, enabling every organization to work more productively, collaboratively, and securely. Built on more than 30 years of industry experience, iManage helps leading organizations manage documents and emails more efficiently, protect vital information assets, and leverage knowledge to drive better business outcomes. As your strategic business partner, we employ our award-winning AI-enabled technology, an extensive partner ecosystem, and a customer-centric approach to provide support and guidance you can trust to make knowledge work for you. iManage is relied on by more than one million professionals at 4,000 organizations around the world. Visit www.imanage.com to learn more.

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