

MHA TAIT WALKER KICKS OFF IT MODERNIZATION WITH iMANAGE WORK IN THE CLOUD

Cloud migration improved search, flexibility, and client service while also being cost effective



Industry:

- Business Services

Headquarters:

- Newcastle, England

iManage Footprint:

- iManage Work in the cloud



About Ascertus:

Ascertus is a leading iManage partner and document management specialist providing high quality, expert solutions and support.

Executive summary

Initially, the business applications at independent accountancy practice MHA Tait Walker were primarily deployed on-premises. The firm wanted to create a more powerful and resilient IT infrastructure that allowed their team to work from anywhere. With iManage Work in the cloud, MHA Tait Walker is benefiting from a standardized way of working across the organization, enhanced security of the firm's data, cost-effective application management, and operational efficiency.

MHA Tait Walker provides not-for-profit organizations, large corporates, owner-managed businesses, and individuals with a complete set of accountancy and advisory services. The firm's seven offices are located across the Northeast of England, including their head office in Newcastle. A longstanding on-premises user of iManage Work document and email management system (DMS), the firm has migrated the solution to the cloud with Ascertus as the implementation partner.

Simon Brown, IT Partner, MHA Tait Walker, says, "Adopting cloud technology for DMS has been a revelation. The difference between the on-premises and cloud versions of iManage Work is that of night and day."



We can even use the iManage Work app on our mobile phone or iPad (or use a web- browser from any other device) and view the information as needed. The speed of access is so much faster. It's there, it's on, and simply works.

Simon Brown, IT Partner, MHA Tait Walker

Benefits:

- Users can easily access Work from anywhere, anytime, and via any device.
- Streamlined search functionality makes it easier to find the right information quickly, while still restricting access to authorized users.
- Integration with Microsoft Outlook makes it simple to save pertinent emails and attachments.
- Enhanced security in the cloud ensures that the firm's data is safer than ever.



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Simon Brown,
IT Partner, MHA Tait Walker

Today, MHA Tait Walker is benefiting from a standardized way of working across the organization, enhanced security of the firm's data, cost-effective application management, and operational efficiency. Most importantly, iManage fits with the firm's cloud-first strategy and IT program.

The challenge

Looking toward the cloud

Going back more than three years, all the business applications at MHA Tait Walker were primarily deployed on-premises with servers located in the Newcastle head office. As a firm that grasps the importance of technology for efficient and innovative business operation, MHA Tait Walker wanted to create a more powerful and resilient IT infrastructure, allowing their team to work from anywhere, and as part of that effort, moved the servers offsite and into the Microsoft Azure cloud.

Brown elaborates, "While we 'lifted and shifted' our tin boxes offsite to a data center, we also took a strategic decision to embrace the cloud, adopting Azure cloud for as much as possible of our estate. At the same time, we began reviewing all our application vendors to identify those that offered a cloud software-as-a-service (SaaS) option. Real-time access to data is a powerful capability and cloud technology provides different ways to retrieve, manage, and search the data that applications stored in siloes in tin boxes of servers simply don't. Fortunately, iManage Work was already a proven solution in the cloud, and with the DMS being a business-critical application for our firm, we decided to move forward with its transition to the cloud first, using the SaaS version. In fact, iManage Work in the cloud complemented our IT modernization journey."

Mark Richman, Principal Product Manager, iManage, agrees that cloud technology offers more powerful capabilities to users than on-premises solutions. "Leveraging the economies of scale that cloud computing provides has allowed iManage to improve application performance and accessibility while simultaneously offering a solution that is substantially more secure than what a customer can achieve on-premises. Partnering with Microsoft to deliver these capabilities on top of Azure makes tremendous sense for both us and our customers given the global reach, technical strength, and peerless security of their public cloud platform."

The solution

Finding the right partner

MHA Tait Walker's partnership with Ascertus Limited dates back over a decade when the firm first deployed iManage Work on-premises. Ascertus was an obvious choice as the implementation partner for the firm's move to the iManage cloud. Brown states, "Ascertus has been our partner ever since we first decided to adopt iManage. They are a very important partner to our business, given that the DMS is a business-critical application."

Ascertus directed MHA Tait Walker's move of iManage Work from on-premises to the cloud meticulously and methodically. Jon Wainwright, Sales Director, Ascertus, says, "Data cleansing and migration is the most important element of any cloud deployment, so it's critical that it is allocated the necessary time within the project timelines."

Ascertus undertook a thorough review of the firm's data in iManage Work that comprised 10s of millions of files spanning a number of years. This process included revisiting the data structure in the on-premises application as well as data cleansing to ensure that only the most accurate, current, and relevant data was migrated to the cloud. Key to the data migration process was ensuring that the on- premises and cloud versions of the data were identical and synced, so that on go-live, MHA Tait Walker could confidently turn off the on-premises application.

The company also played a central role in ensuring that user adoption of the cloud solution was the best it could possibly be. Based on its formalized, structured, and well-tuned Customer Success Program, Ascertus delivered customized user training to all employees.

The benefits

Transformative search and security

Today, over 175 users across the organization have access to the DMS in the cloud, facilitating a standardized way of working in the firm.

Users are able to easily access the application from anywhere, anytime, and via any device. Previously, users had to dial into the firm's network before then being able to gain access to data in iManage Work via the desktop service.

Brown adds, "We can even use the iManage Work app on our mobile phone or iPad (or use a web- browser from any other device) and view the information as needed. The speed of access is so much faster. It's there, it's on, and simply works."

iManage Work in the cloud has transformed MHA Tait Walker's approach to document management functionality. Previously, the firm was using iManage Work as a virtual filing cabinet with multiple siloed folders by practice area, clients, project, and so on. This impacted searchability. While those folder structures and workspaces still exist in the cloud instance of iManage Work, from a search perspective, the application is a "big bucket". It doesn't matter where the data is stored – it is searchable, and the data is safeguarded by underlying security policies assigned to the information by users. This means that while the data is easily identifiable, access can be restricted to authorized users only.

Users are able to tailor their search down to a granular level and find results quickly. Brown comments, "We can conduct searches without the need to pre-set a number of criteria before it returns any results and can continue to filter the search until the right information is found. The search function in the DMS is as similar to and as simple as it is in Amazon if you were looking for say, T-shirts – you start with a 'T-shirt' keyword search, then fine-tune it by color, size, delivery mechanism and so on, to find exactly what you want."

Professionals at MHA Tait Walker find the "File and View" feature exceptionally useful. They are able to scroll down the search results and click on individual documents to preview and help identify the files they are looking for. For instance, if a user is looking for documents that are related to, for example, "fixed fees," they can preview to determine the relevant files easily.



iManage Work in the cloud has been revolutionary. It's driving business efficiency, but also helping us to be at the forefront of business change so that we are able to offer innovative services that meet the continually changing demands of our clients. We have exciting times ahead of us.

Simon Brown,
IT Partner, MHA Tait Walker



In the long-term, it's more cost-effective to be in the cloud versus maintaining our own data center. And from a security perspective, the reality is that security in the cloud is more than our security can ever be in our on-premises environment. The cost of ensuring that level of security is simply prohibitive.

Simon Brown,
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iManage Work's integration with Microsoft Outlook is also encouraging adoption of best practice document management. Users are able to save pertinent emails and attachments directly from within Outlook. They are also able to set up "auto file" rules based on specific conditions and criteria, which means that emails on specific subject matters or containing particular keywords get automatically saved in the DMS, without professionals having to manually save those files.

Safer in the cloud, no matter where you are

Security of MHA Tait Walker's data is significantly enhanced in the cloud. iManage Cloud has layered on two-factor authentication, in addition to all the intrinsic data security safeguards that the application provides.

During the COVID-19 lockdown, everyone at MHA Tait Walker had secure, 24x7 access to the data in iManage Work. Professionals worked just as efficiently from home during that period as they did prior to it in the office. As a client-centric business, the firm was able to continue to work as normal with clients throughout the various lockdowns without data sensitivity concerns.

According to Richman, this is a key perk of migrating to the iManage cloud. "Our globally distributed cloud platform allows us to make knowledge work for our customers, providing the best possible performance for all users regardless of where in the world they are located, while still respecting local data residency and privacy regulations."



Looking ahead

The long-term cost-effective option: moving to the cloud

In moving to the cloud, MHA Tait Walker has removed the burden of IT infrastructure maintenance as well as the cost of managing their own storage capacity, data center, and security. Comparing this shift to the cloud and the firm's original move to their offsite data center and Azure cloud, Brown explains, "The cost of setting up our infrastructure and provisioning the necessary storage capacity versus moving to the SaaS iManage Cloud is identical, pound for pound, in financial terms. So, on this basis alone, it makes business sense to do away with the hassle and just pay the vendor to take care of the application for us."

Brown adds, "However, in the long-term, it's more cost-effective to be in the cloud versus maintaining our own data center. And from a security perspective, the reality is that security in the cloud is more than our security can ever be in our on-premises environment. The cost of ensuring that level of security is simply prohibitive."

Better client service through automation

The ability to drive automation in the business is a key component of MHA Tait Walker's strategic objectives. Customers are demanding a new way of working from professional services firms and MHA Tait Walker is actively exploring how the organization can better service their clients. iManage Work in the cloud serves as the foundation for a lot of this activity.

The firm is provisioning self-service options for customers. To this end, Ascertus has implemented iManage Share, a solution that facilitates collaboration and content sharing with both internal and external shareholders, at MHA Tait Walker. The firm is now independently building a series of new automations (for internal users and clients) that integrate with iManage Work for data storage, Office 365, and iManage Share so that clients can upload their documents as well as view the status of their projects.

Brown concludes, "iManage Work in the cloud has been revolutionary. It's driving business efficiency, but also helping us to be at the forefront of business change so that we are able to offer innovative services that meet the continually changing demands of our clients. We have exciting times ahead of us."

About iManage™

iManage is the company dedicated to Making Knowledge Work™. Its intelligent, cloud-enabled, secure knowledge work platform enables organizations to uncover and activate the knowledge that exists inside their business content and communications. Advanced Artificial Intelligence and powerful document and email management create connections across data, systems, and people while leveraging the context of organizational content to fuel deep insights, informed business decisions, and collaboration. Underpinned by best of breed security, sophisticated workflows and governance approaches, iManage has earned its place as the industry standard through continually innovating to solve the most complex professional challenges and enabling better business outcomes for over one million professionals across 65+ countries. Visit www.imanage.com to learn more.