



**iManage**

Making knowledge work

# Making Knowledge Work™

for Corporate  
Legal Departments



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Smarter, faster, safer

# Collaborative, future-forward legal document management



Many corporate legal departments face immense challenges using traditional enterprise document management tools that were not designed to handle the complex demands of legal professionals.

Emailing, uploading, modifying, downloading, and resending sensitive documents. Wondering which version is the latest. Copying information from one application into another. Back-and-forth messaging with team members. Coordinating revisions and approvals. Catching errors and omissions along the way. Starting over when you realize you forgot to include something. Sound familiar?

Corporate legal teams are tasked with minimizing the legal risks in achieving business objectives. This requires instant access to the most relevant knowledge from the most applicable documents, emails, and messages.

Too often, enterprises store critical information across multiple, disconnected repositories or applications with limited search capacity or version control. Collaborators sift through countless document versions and file locations, stalling progress.

These document repositories are generally not designed to protect sensitive materials in a demanding regulatory landscape. Essential information in email attachments, shared network drives, and undocumented chats may fail to surface when needed. Conversely, confidential information may surface when it shouldn't.

A sophisticated cloud-native document management platform that is designed for legal professionals can unify workspaces, take advantage of AI-driven efficiencies, and make knowledge more accessible.

iManage Work delivers advanced document and email management via a highly secure, cloud-native platform. Designed for professionals who manage sensitive and regulated knowledge content, iManage solutions are deeply integrated with your existing work experience. iManage tools are displayed and immediately accessible in your Microsoft 365

platform, including frequently used applications like Word, Outlook, Excel, and Copilot. Users can easily save, search, compare, or share content, without leaving the familiar Microsoft environment. And powerful AI capabilities are built in, right where the user needs them.

Legal teams choose iManage Work as their document management system (DMS) to lay the foundation for accelerated business performance with fast, easy searches, real-time collaboration, secure knowledge sharing, and integrated AI efficiencies. They gain a knowledge work platform that is even more pivotal than they expect.

Corporate legal users put their trust in the iManage platform to help them:



#### **Meet today's needs and seize tomorrow's opportunities**

- Integrate your DMS seamlessly with your legal technology environment, including matter management applications, document automation, and many other tools you use every day.
- Capture the highest value from automation initiatives and technology advancements.
- Lay the groundwork for effectively delivering your AI strategy by collecting organizational knowledge AI can use to provide insights to the larger enterprise.



#### **Protect, control, and secure sensitive information**

- Protect confidential information with the most advanced security protocols including Zero Trust architecture, advanced encryption, and 24/7 monitoring.
- Prevent unauthorized document sharing with advanced access controls and granular permissions based on roles, responsibilities, and need-to-know status.

- Use automated document routing, approval, and retention workflows to ensure compliance with regulatory policies and reduce risk exposure.
- Track every document interaction with comprehensive audit trails that record every access, modification, and share.
- Automate adherence to industry regulations and corporate governance protocols.



#### **Boost collaboration, efficiency, and productivity**

- Consolidate related documents, emails, and chats in a single, searchable matter space to easily access, share, and reuse knowledge.
- Respond quickly and decisively to business needs using intelligent search tools to find information instantly.
- Stop managing documents and revisions via email attachments. Co-author and co-edit in real time in a shared matter space.
- Collaborate efficiently with stakeholders across the business, even when they are not frequent users.
- Compare document versions, revert to previous iterations, and ensure everyone has the latest information.
- Work securely from anywhere on any device with iManage Cloud.

**In this asset, you will discover how your team can enhance productivity, improve access to information across the organization, achieve peerless efficiency, work more securely, and meet risk and compliance objectives with iManage.**



## Chapter 1

# Empower teams to be productive



### Overwhelming work volumes and complexities



**Nearly half (48%)** of legal, risk and compliance professionals surveyed ranked overwhelming work volume as the biggest challenge they face. In fact, due to increasing data volumes and complexity, managing and prioritizing a high volume of work has been their nemesis for four out of the last five years. More stringent regulation and global data standards have added to the challenge.

“ ”

Effective regulatory compliance, risk management, and information governance navigation are critical to unlocking bandwidth so that teams can focus on long-term transformation down the line.

**Michael Pontrelli**, Managing Director,  
Global Strategic Client Experience at Consilio

Source: [Consilio Fifth Annual Global Survey<sup>1</sup>](#)

## What stands in the way of the legal team's productivity?

Overwhelming workloads, increasing data volumes, and compliance burdens cause confusion, delay, and unmitigated risk.

All (100%) of in-house counsels surveyed report an increase in the volume and complexity of their work, while 81 percent say their team is under-resourced relative to growing demands ([Axiom<sup>2</sup>](#)). Similarly, 82 percent of chief legal officers surveyed report that legal function workloads have increased over the past 12 months ([Deloitte<sup>3</sup>](#)).

Centralization, collaborative matter spaces, version control, and governed access are core features that make a cloud-native DMS platform the ideal tool for improving productivity with technology that unifies the legal team's efforts and amplifies them throughout the business.

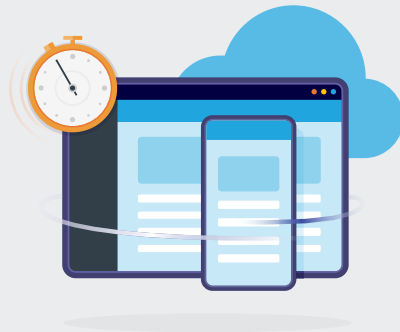
### Take back your time: Eliminate interruptions

After a work interruption, people take an average of **23 minutes** and **15 seconds** to get back on track. ([UC Irvine<sup>4</sup>](#))

Even brief mental blocks created by shifting between tasks can cost as much as **40 percent** of someone's productive time. ([American Psychology Association<sup>5</sup>](#))

The average office worker toggles between different apps and websites nearly **1,200 times** each day, spending almost four hours a week reorienting themselves afterward. ([Harvard Business Review<sup>6</sup>](#))

The iManage Cloud DMS can save each worker **240 hours** yearly in time spent searching for content. ([Forrester Consulting<sup>7</sup>](#))



### Instant access from a single, centralized repository

Corporations have, on average, five repositories where documents may be stored ([Forrester Consulting<sup>8</sup>](#)). To find documents, legal professionals must switch between multiple applications and repositories, retyping their search terms over and over. Colleagues may repeatedly interrupt one another with questions about where to find information while performing this tedious task.

On a truly modern cloud-native DMS platform, documents are saved in a single, secure repository, organized by project or matter, tagged with relevant metadata, and made readily available to all authorized individuals. Emails and their attachments can be saved automatically to the appropriate workspace, where collaboration and co-authoring occur in real time.



### Amplify team success with frictionless collaboration

The time spent resolving issues related to inefficient collaboration costs organizations an estimated \$16,491 a year per manager in wasted time or up to \$874,000 annually for an enterprise of 1,000. ([Zoom<sup>9</sup>](#))

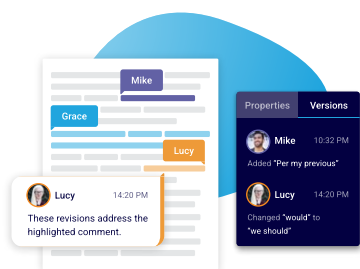
A modern cloud platform must offer intuitive organization and information-sharing capabilities. Users must be free to securely access and exchange information from anywhere, any time, and on any device, without switching applications, making collaboration effortless.

On this platform, you can easily co-author and co-edit documents without the need to check them in and out. Just send a link and join multiple collaborators to access and modify a document simultaneously. Changes made by different individuals working on the same document are time-stamped and saved with the document. You can even work on documents from Microsoft Teams, with preview, edit, and search capabilities.

According to [Forrester Consulting](#)<sup>10</sup>, iManage improves collaboration with stakeholders by an average of 11 minutes from time saved per document search, upload, and email save. Tiers of service enable iManage users to collaborate and share content efficiently with stakeholders across the enterprise, even those who use the platform infrequently. Extended across a large organization, this streamlined collaboration delivers real business impact.

Impactful time savings are also being discovered by customers using iManage Tracker, the app designed to reduce context switching and streamline processes. Fully integrated with Microsoft Outlook and iManage Work, Tracker lets users organize tasks by project, client, or matter for immediate stakeholder visibility. Dynamic apps and workflows can be built using Microsoft Power Automate to manage review and approval processes, identify roadblocks, and view project status. Tracker wins the day for in-platform task management with its unique ability to link to active documents and its support for an extensive array of tasks and lists.

What about all those document versions that crop up in a document-focused environment? This calls for advanced version control capabilities, and iManage does not disappoint, giving corporate legal teams powerful productivity and a valuable audit trail.



### Version control gives document history a safety net

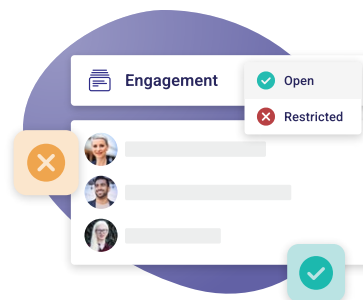
If you've ever wished you could retrieve an earlier version of a document or see the prior comments to understand the "why" behind revisions and final decisions, your wish is granted. iManage Work tracks

every action taken on a document. You can easily compare edits and revert to a prior version if needed.

No more accidental deletions or overwritten text. Version control preserves the complete history of every document in an audit trail that shows all revisions, comments, and approvals. Rest assured that all changes are recorded to answer future questions and comply with regulatory requirements or auditory needs.

Version control is a meticulous record keeper that accelerates collaboration and streamlines the process of creating and revising legal work product. It provides a safety net to ensure that legal professionals can always confirm the most recent information.

Another critical safety net comes in the form of document access controls.



### Solve the permissions pain point

Documents with confidential and highly regulated content must stay secure, both internally and externally. When controlling document permissions is confusing, time-consuming, or entails too much red tape, it can stall collaboration — or worse, leave content unprotected.

In a few mouse clicks, authorized users on the iManage platform can block, grant, or restrict a document's access, for individuals or groups, and set document permissions for internal or external collaborators. For added security, the access controls you apply travel with the documents, so that only authorized individuals can access sensitive information.

User-friendly interfaces meet professionals where they work and provide lightning-fast search capabilities across all your content.

## Chapter 2

# Intelligent search saves time and effort



Search can be the bane of legal professionals, who may spend hours trying to unearth and filter out the most clearly relevant bits of information. They may scroll through rows of document titles and skim pages of text trying to ferret out the most recent version. They may even recreate documents that already exist, wasting more precious time.

This isn't an anomaly; it is an industry-wide problem. [Gartner](#)<sup>11</sup> found that 90 percent of surveyed legal staff feel they slow down their organization's initiatives. [Thomson Reuters](#)<sup>12</sup> tells us 53 percent of in-house counsel surveyed say they spend too much time on repetitive low-value tasks. In terms of time to value, spending hours doing what should and could take seconds is far from ideal.

Expedited document filing, retrieval, and review processes enable legal teams to respond to company needs faster. The legal group at the Asian Development Bank told us they spend 75 percent less time on document searches and filing since they adopted the iManage knowledge work platform.

Backing this up, [Forrester Consulting](#)<sup>13</sup> found substantial, quantifiable benefits to corporate legal teams using iManage, including substantially reduced search time (7 minutes per document) due to:

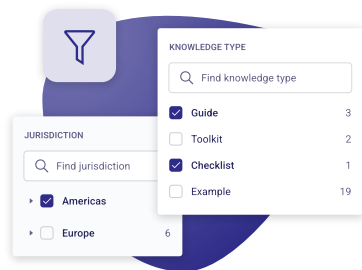
- the platform's powerful search capabilities
- the ability to create a preferred filing structure that mirrors work habits, and
- the consolidation of content into a single repository.

Forrester also said that 30 seconds were gained for each email saved via predictive filing. With these savings and others, the report found that each user saved 240 hours annually, worth \$3.8 million over three years.



To deliver even more personalized and accurate search results, iManage “remembers” how people work. For example, a lawyer may forget to add the project name as a search criterion – but because they’ve worked on the same one for three days, the iManage DMS returns documents related to that project first.

Saving customers \$3.8 million over three years is a great starting point, but iManage developers have not been idle. They are building ever more intelligent, ever more powerful capabilities into the platform, including Insight+, a next-gen knowledge search and management solution native to the iManage Cloud ecosystem and architected to take advantage of the platform’s current and future AI capabilities.



### Harness your organization's collective knowledge

Organizations run on knowledge, and they are using iManage Insight+ to extract the greatest value from that knowledge. Its best-in-breed search enables knowledge workers to find and re-use quality work product faster than ever. Templates, checklists,

updates, and examples are submitted from Work for a frictionless user experience — all while verifying and enforcing the access and permissions intrinsic to the platform.

Granular filtering capabilities in Insight+ enable users to fine tune the results more than they would with a traditional document management system or DMS. The platform accommodates flexible tagging that includes taxonomies, multi-value tags, helpful notes, and more, so users get more context, detail, and search parameters. And, because Insight+ is built natively in the iManage Cloud, it inherits the security, configurability, and centralized storage of iManage Work to create a knowledge collection.

The Matter Locator in Insight+ empowers your teams to surface patterns of information in your data lake. Think, for example, of projects per department, workload assessments, outside counsel, spend by firm or matter type, time spent per request, or even the number of revisions by document class. Insight+ delivers all this intelligence while your documents stay safely in iManage Work.

Via locators, Insight+ sets the stage for future search experiences to identify relevant deals, experts, and litigation, as well as through the application of iManage AI. We cover this in greater detail in the next chapter.

Insight+ delivers effective tools for curating and enriching your knowledge assets. Power Automate provides the structure for knowledge intake and a curation workflow. These tools are made available to users within iManage Work so your legal experts can submit knowledge assets quickly and securely for publication and enrichment.

In an information-intensive economy where organizations run on knowledge, Insight+ makes that knowledge more structured, accessible, and valuable. Corporate legal departments are using Insight+ to advance desired business outcomes and progress their knowledge work maturity. Insight+ also provides healthy, high-quality data that is ready to go for your automated AI efficiency.

## Chapter 3

# iManage Work for accelerated AI time-to-value



### Automation is on the rise



**67%** of General Counsels plan to improve their legal department's ability to handle high demand using automation ([FTI Consulting<sup>14</sup>](#)).

**The more organized and accessible your company's knowledge is, the more efficient your team and its automated workflows can be.**

Effective data architecture and data models create balance, enforcing data governance and security policies while making documents more accessible and useful. Effectively, this means:

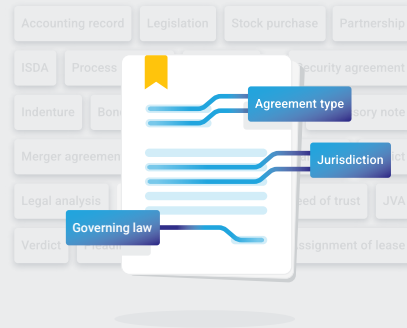
- Improved AI accuracy
- Lower AI development cost
- Accelerated AI time-to-value

The best solution incorporates artificial intelligence throughout the platform to better understand and organize the documents it protects. The data architecture and data models woven into the iManage knowledge work platform provide the necessary roadmaps and signage for automated tools to perform their assigned tasks without a hiccup.

According to [Forrester Consulting<sup>15</sup>](#), legal and compliance team members save an average of 3.5 minutes when uploading documents using an AI-enhanced DMS that can automatically classify documents according to their various metadata.

## How to think about metadata

Consider how, as a shopper on a website, you use a filter to choose the characteristics of what you want to see — maybe it's style, color, size, brand, and price. You define the parameters of what you're looking for, and the search function presents items that meet your requirements.



Similarly, metadata — pertinent details about the information being stored — is associated with a document or file when it is saved into the repository. Every document might be automatically tagged with its project or matter number, document type, author, editor, date created, and date revised, for instance.

Customized metadata tags create a treasure trove of searchable information. It might include project or matter type, version number, jurisdiction, status or disposition, and even comments. Extended text tags let you add lengthy descriptions that enable you to capture unprecedented detail.

Advanced metadata tagging and intelligent search features work together to retrieve documents that meet very specific requirements. You can perform full-text searches for keywords or phrases in the text of a document's current body or in prior versions.

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## AI data architecture and classification — a quick overview

Data architecture is like a map of your data management processes, showing exactly how AI tools collect, analyze, integrate, store, and dispose of documents and data.

Document classification and extraction functions are key components of an effective data architecture. They enable AI tools to interpret a document's content and context.

Data models help AI tools navigate technology systems to find relevant information. Like a human without a GPS, AI doesn't know where to go without a model.



## Build AI strategy on a strong foundation

AI is only as reliable as the data that supports it, and corporate legal departments need vital data architecture and classification capabilities to successfully deliver their AI strategy.

iManage Insight+ [see Chapter 2] is a powerful way to reach that goal, but it isn't the only way.

Another way that iManage embeds AI throughout its knowledge work platform is with iManage AI Enrichment. This application automatically classifies documents by type, extracts key information points to preserve context, and saves the information with the document, enabling more accurate searches and improved productivity. In short, it is the easiest, most frictionless way to begin making your data more actionable.

AI Enrichment builds a strong foundation for AI, ensuring that the data pool you draw from is sufficiently rich to produce accurate, meaningful outputs. It provides valuable context about documents that makes it easy to surface files likely to contain sensitive details. Legal teams can then implement necessary safeguards to limit access and identify documents that must be maintained to adhere to data retention rules.

Automatically and at scale, AI Enrichment works to analyze and classify existing documents and new documents as they are added without requiring any additional input from workers. This reduces the department's operational burden and efficiently builds the essential foundation for successful AI delivery.

What else can you achieve with iManage AI without ever leaving the safety and security of the platform?



### Ask iManage to get the right answers fast

According to [Gartner<sup>16</sup>](#), the percentage of legal requests answered by self-service tools designed for business users will increase from low single digits to at least 20 percent in the next three years. We think that estimate may be a bit conservative.

Legal professionals are anxious to use generative AI tools like ChatGPT, but companies have valid concerns about exposing their most sensitive content to third parties and generic consumer internet services. But there is a safer option.

With Ask iManage, the advanced generative AI capability native to the iManage platform, legal professionals can use natural language queries to quickly and safely source information from – and do more with – their knowledge resources.

Built directly into Work, Ask iManage is a powerful AI assistant designed to accelerate daily tasks for busy professionals.

With Ask iManage, you'll get direct answers to specific questions or information queries – such as what the governing law is for a non-disclosure agreement or the exact wording of a specific clause – without having to develop carefully crafted prompts.

Ask iManage delivers accurate results that are directly tied to the source material, your documents. You receive answers to your questions along with their origin: simply click on an answer to be taken directly to the location in the document where it was found. And, importantly, embedded safeguards protect sensitive and confidential data at all times, preserving your organization's intellectual property and reputation.

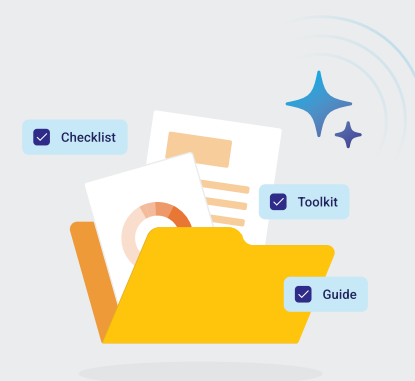
## Boost performance with generative AI

AI is expected to save legal professionals about **12 hours** per week in the next five years, equating to 200 hours annually ([Thomson Reuters<sup>17</sup>](#)).

More than two-thirds (**70%**) of in-house professionals use Gen AI at least once a week, with increased efficiency in task completion (86%) as the top benefit reported. ([ACC/Everlaw<sup>18</sup>](#))

Over **70%** of legal leaders will either begin or continue to implement Gen AI solutions in their departments in the next two years. ([Gartner<sup>19</sup>](#))

**90%** of corporate legal executives expect their Gen AI investment to increase over the next five years. ([LexisNexis<sup>20</sup>](#))

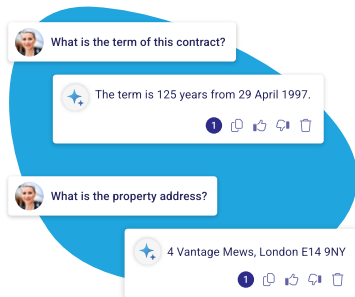




Integrating AI-driven efficiencies into secure, trusted workflows, Ask iManage redefines productivity and replaces tedious tasks with enhanced document management. This frees you to focus on confidently delivering exceptional results. But the advancements don't stop there.

In addition to providing secure access to natural language queries of your data within iManage, Ask iManage enables you to automate repetitive tasks like document summarization or comparison, clearing your schedule for higher-value work. And it fits into your workflows without missing a beat.

Opportunities for automation in legal departments are limited only by the imagination. Some of your automated workflows may be driven by document events such as approval status changes or expiration dates. You might also choose to auto-route documents to designated staff based on their remit. But once again, that's not all.



### Submit queries across your entire knowledge collection

Remember iManage Insight+ for searching and managing knowledge in Chapter 2? Ask iManage is built into both Insight+ and iManage Work, so knowledge workers can do more than take deep dives into selected documents — they can surface answers in seconds across your entire knowledge collection.

Using Ask iManage in Insight+, you'll get trustworthy, answers grounded in your firm's best knowledge. And you can verify and re-purpose with ease, since source documents, citations, and related information appear alongside results for immediate oversight and validation. Taking advantage of the lightspeed search capability that Ask iManage puts at your fingertips in Insight+ will lead to measurable reductions in your department's search times.

But wherever legal professionals use Ask iManage, they get started quickly, with no expertise in AI prompting. It's an intuitive approach, choosing from predefined tasks with questions and prompt guidance. Tasks execute rapidly, with high-quality outputs and clearly marked citations enhancing confidence in work quality, which is especially important in complex or high-stakes situations.

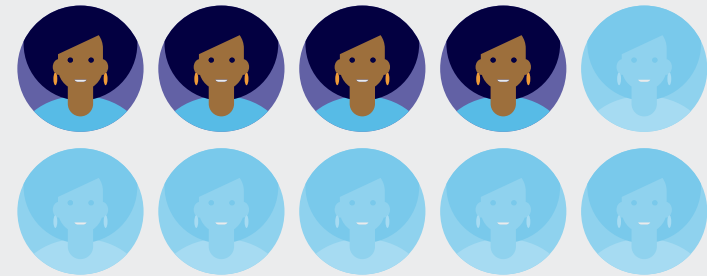
Of all the tasks that come to mind, the stakes in risk and compliance — spelled out in Chapter 4 — could not be higher, or the possibilities more compelling.

## Chapter 4

# Realize the potential of automated compliance



### Increasing internal investigations



**4 in 10** Chief Legal Officers report a rise in internal investigations. External investigations have also increased for 24% of CLOs ([ACC/FTI Consulting<sup>23</sup>](#)).

### In-house counsel spend a significant amount of time and effort managing concerns related to security, regulatory requirements, information governance, and data privacy.

- 41 percent of legal department leaders say regulatory compliance is their number one risk, while 61 percent said data privacy takes the most time from the legal department.
- 58 percent said incident response matters such as data breaches take up the most time. ([FTI Consulting<sup>21</sup>](#))
- 61 percent of in-house counsels were involved in at least one regulatory proceeding last year (up from 50% the year prior). The average number of proceedings is 3.9 ([Norton Rose Fulbright<sup>22</sup>](#)).

Constantly changing AI regulations demand continuous adaptation. AI can help by proactively applying restrictions and facilitating adherence to regulatory obligations, a boon for any legal team. Documents that require special attention for security, governance, or data retention can be automatically identified and tagged. Pre-set instructions attached to each tag can route documents appropriately with little to no human involvement.

Automation ensures consistent and secure handling of documents at every stage to reduce manual errors or oversights that can lead to compliance breaches. Automated access controls minimize the threat of exposure of sensitive information to unauthorized parties. Time savings and risk mitigation abound.

But, in addition to security and privacy concerns, issues may stem from the methods used to implement AI models and the data used to train algorithms.



### Weigh the value of trust and experience.

It is wise for legal teams using home-grown AI tools internally to proactively identify and mitigate potential problems that include:

- Data quality concerns, including those regarding bias, fairness, and discrimination
- Data management concerns, including the appropriate handling and use of data (including third-party data)
- Legal and regulatory obligations concerning data privacy and data protection
- Requirements to address transparency and explainability in AI systems
- Legal issues such as copyright risks and intellectual property rights

Adopting AI solutions from a third-party vendor can transfer these burdensome obligations to the vendor, along with their related costs and risks. In this event, it pays to have a trusted relationship with a provider whose AI is built on a security foundation that is already vetted and accepted.

Important considerations:

- Scrutinize the vendor's data handling practices. Ask: Where is our data stored and processed? How do you keep it secure? Do your processes comply with regulations such as the EU's General Data Protection Regulation (GDPR)?
- Can the vendor explain how their AI models work? Do their processes address accountability and potential bias?
- Ensure the vendor cannot use your data to train their AI models without your explicit permission.
- Request and review the vendor's security audits and certifications (SOC 2, ISO 27001) and their incident response protocols.
- Negotiate contracts to address relevant data ownership, usage rights, liability, indemnification, and termination clauses.

Ultimately, many legal departments achieve effective AI governance more easily and with less cost by working with a trusted, well-established solutions provider. Industry-leading security protocols can also protect your team from data privacy violations — learn how in the next chapter.

## Chapter 5

# Employ rigorous security practices



We can all agree that legal documents demand the highest levels of security and protection. Often unknowingly, legal professionals expose sensitive information that requires protection to unnecessary risk.

Storing documents in unprotected locations, sharing information via email, and discussing work details on messaging apps are all ways that confidential information may be made vulnerable.

Expecting individuals to preserve the confidentiality and manage the security of every document or communication they handle, however, is both unsafe and unrealistic.

Legal teams can meet the challenge of evolving data protection and privacy requirements by implementing solutions that make adding and revising obligations easy and seamless and don't interrupt everyday work activities.

### Know what the solution should offer

To accomplish this, many corporate legal departments seek a vendor that provides the highest levels of protection with the least amount of individual effort from team members. Any solution considered should include the essentials:



#### Active threat detection

Continuous monitoring of content and communications alerts you to potential threats.

- **Suspicious activity** — unusual access attempts, downloads, or modifications of sensitive documents may indicate someone is trying to breach your security.
- **Abnormal user behavior** — anomalies that could indicate a compromised account or employee issue need to be addressed quickly by a superior.





### Advanced security features

- **Zero Trust architecture** — makes unauthorized access virtually impossible. Users must provide their credentials every time they access data.
- **Automatic data backups** — are stored in a separate data center to ensure your documents can be recovered if needed.
- **Data is encrypted** — so only authorized users with the encryption key can access it.
- **Data leak prevention** — means sensitivity level travels with the data, maintaining its protection when shared with unauthorized users or if someone in a restricted geographic region tries to access.



### Sophisticated compliance features

- **Document audit trails** — track user activity such as creation, edits, access, and deletion and maintain a reliable audit trail for every document.
- **Automated retention rules** — are configured to meet regulatory requirements and to ensure documents are not prematurely deleted.

These essential requirements are all accounted for on the cloud-native iManage knowledge work platform, which holds the industry's top ISO certifications and maintains the most advanced security protocols. These are continually updated to meet regional and jurisdictional data requirements.

Policy enforcement is built into iManage system architecture to keep your data secure and your governance on target. Security in the iManage Cloud has your back, affording your legal team the strongest possible protection and meeting the most rigorous security requirements.

## Chapter 6

# Rely on a trusted DMS provider



Forward-thinking legal departments have a trusted partner in iManage. More than a million professionals at 4,000 organizations around the world rely on iManage, including more than 40 percent of the Fortune 100.

iManage supports the specific workflows, collaboration needs, and communication requirements of corporate legal professionals. There's simply more your team and your organization can do using the iManage knowledge work platform — and more you can envision doing as you grow and evolve. What are some examples?



### Keep more work in-house

Corporate legal departments continue to focus on cost containment, with 44 percent ranking it as a top challenge and 74 percent actively seeking to lower costs by bringing more work in-house. The goal is especially urgent as law firm rates increased for 9 out of 10 legal departments in the last 12 months ([Blickstein<sup>24</sup>](#)).

Throughout this book we've made the case for time and cost savings. You can reallocate the time and effort your legal team saves by using the iManage platform to complete more work in-house.

Half of Fortune 1000 companies already use generative AI for legal matters. Seventy-six percent of general counsels believe that generative AI will decrease legal department costs, while 72 percent say gen AI will allow them to keep more work in-house ([LexisNexis<sup>25</sup>](#)). With iManage, you can do this from the safety of a trusted platform that meets today's highest standards for both performance and security.



### Access, re-use, and share more knowledge

Collective knowledge empowers lawyers to quickly deliver legal advice that executives can use to capture fast-moving opportunities. Centralizing

your team's work on the iManage platform removes information silos, transforming individual legal expertise into a shared asset for the entire department.

With access to historical insights on everything from prior deals to subject matter experts, even new hires can unlock the full value of their department's accumulated knowledge and apply it to their own work.



### Maintain document governance in integrated systems

Embed automated security and governance into a document's entire life cycle quickly and easily with iManage Work. Support audits and investigations with a few clicks of a

mouse. Bring up document version histories and access logs to provide irrefutable evidence of actions.

iManage reliably integrates with your existing software applications and supports integration with those not yet used or developed. We are deeply partnered into the wider corporate legal ecosystem of technologies, including matter management (e.g., Onit, Co-Flo, ServiceNow, Mitratesh, TR Tracker); digital signatures (e.g., DocuSign); and document automation (e.g., Document Drafter or SmarterDrafter).

The platform architecture supports and supervises applications connected to iManage Work and any automated workflows built between them. This supervision ensures each document's metadata and access controls travel with them, giving lawyers continued control and governance over documents.



### Execute future-forward vision

The iManage platform is 30 years strong and looking forward to the next quarter century, not the next quarter. For decades to come, iManage will be here to protect your sensitive legal content, support your needs, advance your productivity, expand your collaborations, and accommodate your changing regulatory obligations.

**Making Knowledge Work™ today, while laying the groundwork for tomorrow — that's iManage.**

**Visit [imanage.com](https://www.imanage.com) to take the first step toward a more productive team today and a more knowledge-enabled tomorrow.**

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## Glossary

**Access controls:** selective restriction of access to a resource

**Cloud native:** software designed and built to exploit the inherent scale, elasticity, resiliency, and flexibility of cloud infrastructure

**Data modeling:** analyzing and defining both the types of data your business collects and produces, and the relationships between them

**Data architecture:** infrastructure that connects a business strategy and data strategy with technical execution

**Data classification:** identifying, categorizing, and protecting content according to its sensitivity or impact level

**Document classification:** sorting documents into categories to make them easier to find, manage, and analyze

**Encryption:** converting or scrambling data and information into an unreadable, encoded version that can only be read with authorized access ([Cisco](#)<sup>26</sup>)

**ISO 27001:** international standard for data protection that outlines requirements to establish, maintain, and continually improve an information security management system (ISMS) ([secureframe](#)<sup>27</sup>)

**SOC 2:** security and compliance standard that specifies how organizations should protect customer data from unauthorized access, cybersecurity incidents, and other vulnerabilities. ([secureframe](#)<sup>28</sup>)

**Metadata:** data about a document, such as its author, date, size, and topic

**Native integrations:** building one tool into another tool to enable users to push data between them without a third piece of software to bridge the gap

**Zero Trust:** all connectivity must be explicitly authorized without any direct paths (or implied trust) between servers and the production network, the internet, or users

## Checklist: Make the case for iManage

iManage Work is better equipped to meet today's needs and boasts a demonstrated three-year 370% ROI and full payback in less than six months ([Forrester Consulting](#)<sup>29</sup>).

While other options can be useful for document storage and basic collaboration, they lack the specialized features, security, and scalability modern legal departments need to efficiently manage complex workflows and sensitive documents.

### The iManage Cloud platform offers out-of-the-box capabilities to:

- ☐ Apply rich metadata that enables efficient organization, search, and retrieval.
- ☐ Compare versions side-by-side, roll back to previous versions, and track revisions with ease.
- ☐ Provide granular document access controls to comply with ethical, privacy, and legal obligations.
- ☐ Meet legal and regulatory requirements like GDPR, HIPAA, and SOX and produce audit trails that demonstrate compliance.
- ☐ Integrate seamlessly with everyday applications, including the Microsoft 365 product suite, matter management applications, e-signature tools, legal research databases, Salesforce, and other popular applications, including AI.
- ☐ Manage large volumes of varying types of data without affecting performance.
- ☐ Offer flexible and scalable storage options for large legal departments with extensive document archives.
- ☐ Eliminate the use of numerous third-party apps and platforms that lead to fragmentation and integration challenges.
- ☐ Support future investments in additional AI tools, other technologies, and automation initiatives.
- ☐ Protect company IT investments with industry-leading security.

## Notes

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## 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 20 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](http://www.imanage.com) to learn more.**

