

Deloitte Luxembourg implements secure, governed, enterprise document repository for 2,500+ users

Standardized document management on the iManage Cloud platform reduces system complexity, saves time, boosts collaboration, and delivers value



Deloitte.

Industry:

- Corporate: Business Services

Headquarters:

- Luxembourg

iManage footprint:

- iManage Work 10 in the Cloud
- iManage Drive
- iManage Security Policy Manager
- iManage Threat Manager.

Deloitte Luxembourg understands that silos slow people down by hindering collaboration, while complicating security and compliance. The firm recognized it could reduce complexity and add more value for employees by consolidating the ways of working for four business lines, which had historically followed different approaches to document management. iManage Work in the Cloud replaced a custom-built system and local file servers that did not satisfy the needs of the audit & assurance, advisory & consulting, tax, and operations business lines.

Deloitte's team has been supported over the project lifecycle, from initiation to deployment. The project was delivered within the allocated budget, scope, and timeline, helping make the initiative a success. Now more than 2,500 users work on the iManage platform every day, finding information faster, collaborating easily on tasks and projects, and delivering value to clients. With plans to onboard more users, the firm values having a central, secure, and governed content repository as a foundation for confidently connecting with generative AI models in the future.

“ ”

iManage is the common foundation whether people are accessing it directly or through integrations with other frequently used applications.

Patrick Laurent, Advisory & Consulting and Generative AI Leader, Deloitte Luxembourg



Business outcomes:

- Unites enterprise teams and data
- Reduces operational complexity and cost
- Boosts employee collaboration
- Helps drive growth and innovation

Luxembourg is a major financial center, one of two locations where international funds are structured and distributed across numerous jurisdictions. The business combines globalized delivery at scale with people and services tailored to the local market. With 2,569 employees, Deloitte Luxembourg is one of the largest firms in the country.

The business challenge**Standardize siloed business lines for better business outcomes**

[Deloitte Luxembourg](#) follows a multidisciplinary business model, offering blended and customized services to achieve the best client outcomes. Their business portfolio is focused on strictly regulated, highly sensitive client data, and they rely on cutting-edge technology, including generative AI. To serve clients effectively, they require a vendor that meets their high security standards and compliance requirements.

"Our business lines are complex and unique. We were maintaining a variety of document management solutions that served different purposes, and wanted to centralize them on one platform," explained Patrick Laurent, Advisory & Consulting and Generative AI Leader at Deloitte Luxembourg. "The challenge was that those business lines all have different requirements. We couldn't just swap an auditing platform with standard workflows with one that supports our bespoke advisory business, for example."

Although they knew it was an ambitious and large-scale project, Deloitte Luxembourg saw clear benefits in standardizing. Not only would it simplify document and email management, security, compliance, and retention for the business, it would also present a vital opportunity to add value to the employee experience when they are actively managing client engagements.

"You don't change an enterprise-wide system unless there's a strong business case," Laurent continued. "We considered cost savings and security, of course. But ultimately, we wanted to give our people better tools to do their jobs, while creating a central view of enterprise data."

Despite their customizations, Deloitte's original document management solution was built on a general-purpose, file-based environment, not designed for matter-centric work.

"We considered upgrading our in-house solutions to meet our security requirements," says Laurent. "But we recognized that it would be a complex undertaking. An 'off-the-shelf' solution like iManage that was proven to work well for professional services firms was a much more attractive option."

“ ”

We recognized that upgrading our in-house solutions to meet our security requirements would be a complex undertaking. An 'off-the-shelf' solution like iManage that was proven to work well for professional services was a much more attractive option.

Patrick Laurent, Advisory & Consulting and Generative AI Leader, Deloitte Luxembourg

The solution**Enterprise-wide document management that works for all**

Julia Püsiäinen, iManage Platform Owner at Deloitte Luxembourg, shares more about the selection process. "We researched what solutions are used by other Deloitte firms. iManage was highly recommended and listed in the Gartner Magic Quadrant for content services platforms. [iManage Cloud](#) met our needs for a secure, encrypted, cloud-native platform with data centers in the European Union, which is mandatory for compliance."

“ ”

Everyone knows iManage is the gold standard for law firms. Now we want everyone to know how effective it is for managing the complexity of professional services. We're really proud to have achieved that and hope to inspire others to do the same.

Patrick Laurent, Advisory & Consulting and Generative AI Leader, Deloitte Luxembourg

To fulfill its ambition of implementing an enterprise-wide document management platform to support all use cases and situations, Deloitte Luxembourg launched a phased implementation across its four business lines. “iManage is the common foundation whether people are accessing it directly or through its deep integrations with other frequently used applications, such as Microsoft Office 365,” says Laurent.

Deloitte Luxembourg's skilled multidisciplinary project team took the lead on the deployment. A sandbox, as well as technical advice on design, and configuration, were provided. The team integrated iManage with Microsoft 365, the ERP system, and other essential, frequently used applications, applying security standards and ensuring compliance with local regulations. They defined a document migration strategy and began with the tax business, which uses more structured data than other departments and was therefore the easiest to migrate.

The firm migrated approximately 10 terabytes of data to iManage. Another six terabytes of data have been added to the platform in the year since going live. The rollout included vendor selection, design, implementation, and the phased go-live of the four separate business lines. “The journey's not over yet,” adds Laurent. “Deloitte Luxembourg will continue to adopt new features and adapt the platform to support our evolving business needs.”

Someone with inside knowledge to lead the charge

“Professional Services firms can be complex, so it's easier for somebody with inside knowledge to lead change management than to bring in someone external,” explains Laurent. That's why the project team handled change management in-house.

Before go-live, Deloitte Luxembourg selected iManage champions within each team and trained them to support their peers. The rest of the team took advantage of eLearning developed in-house, with training sessions before and after go-live. Refresher courses tailored to different use cases are available on demand.

“Some groups found adoption easier than others,” recalls Püsiäinen. “People using iManage Drive, for instance, enjoyed how it has the familiar look and feel of their network drives. New hires got up to speed quickly. We publish information on our intranet to assist users and remind people that it's an evolving platform.”

“ ”

iManage Security Policy Manager allows us to create a collection of workspaces based on defined criteria. It automatically adds people to each workspace if they meet that criteria, with no manual intervention. It's a real time saver.



Julia Püsiäinen, iManage Platform Owner, Deloitte Luxembourg



To find out how things were working and shape future changes, Deloitte Luxembourg implemented a ticketing system for iManage questions and gathered the insights. Users reported that new features such as [iManage co-authoring](#) were good examples of the enhanced user experience with iManage and were worth adopting.

Going strong, one year on

As Deloitte Luxembourg approaches its first year on iManage, monthly utilization is at around 88 percent. Adoption is at 100 percent in the onboarded users from the tax business line, as their digital platforms all use iManage at the back end.

"We're striving for 100 percent user adoption across the enterprise, which currently stands at more than 2,500 users who connect regularly to iManage," says Laurent. "and we're actively working to get remaining users on board."

It's helpful that when a new project is created in the ERP system, the integration with iManage triggers automatic folder and workspace creation. Data is retrieved from the integration layer, and Deloitte Luxembourg's in-house integration platform transfers business rules and data policies into iManage seamlessly.

Because the company relies heavily on email to communicate with clients, they appreciate how [iManage Work 10](#) enables users to quickly and easily file their emails into the correct engagement. This creates a comprehensive audit trail of all activities, allowing staff to view emails in context months after they are sent or received.

Access management and permissions, set up in [iManage Security Policy Manager](#), ensure that only users with specified roles are accessing sensitive documents. "iManage Security Policy Manager allows us to create a collection of workspaces based on defined criteria. It automatically adds people to each workspace if they meet that criteria, with no manual intervention," says Püsiäinen. "It's a real time saver."

Compliance for Deloitte Luxembourg is not a question of choosing to be better than average. "There are guidelines and policies we are compelled to respect from global HQ. That our documents are fully safeguarded, with retention policies applied by iManage, means they are completely aligned with those requirements," Püsiäinen adds.

Employees across all business lines use helpful features like co-authoring that empower users to work together seamlessly, stay in control, and drive productivity without disrupting their workflow. In addition, the automated audit trail enables users to track changes and usage. As some teams prepare documents for entire service lines, Laurent explains, it's useful for them to see how the documents are being used – who's viewing, editing, and printing them.

Staff also like the advanced search, which helps them find documents by title, keyword, and author to get more precise, and more granular, results. But arguably the best feature is that – with everyone using iManage in the Cloud – all changes are saved even if their computer crashes. That's a huge weight off IT's mind. The cybersecurity team also use the dashboards in [iManage Threat Manager](#) to keep track of data security, potential threats, and to monitor adoption and usage.

“

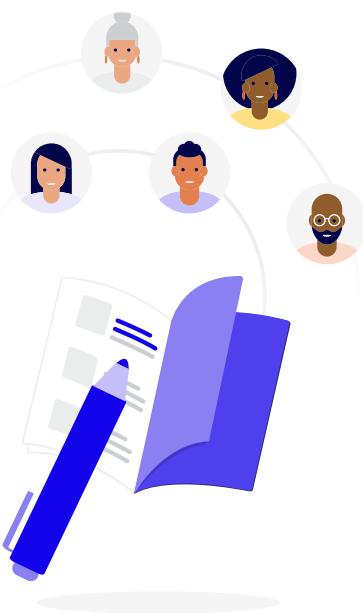
Having iManage integrated with MCP will make working with AI agents seamless. We partnered with the same people who helped with our initial implementation. They already have good inside knowledge of our iManage platform, which will help to develop relevant agentic use cases faster.

Patrick Laurent, Advisory & Consulting and Generative AI Leader, Deloitte Luxembourg



We researched what solutions are used by other Deloitte firms. iManage was highly recommended and listed in the Gartner Magic Quadrant for content services platforms.

Julia Püsiäinen
iManage Platform Owner,
Deloitte Luxembourg



The business outcomes

A tailored, out-of-the-box solution that breaks down the complexity

As the first Deloitte company to migrate all its business lines to a central document management system in one go, Deloitte Luxembourg's skilled in-house team pulled off an impressive feat. And the flexible platform they implemented is perfectly suited to deliver the firm's diverse services at scale. Laurent says it's a testimonial for iManage as a platform, and probably what he is most proud of, how well it simplifies complexity for a professional services firm.

"With iManage, we've implemented enterprise-wide document management, and that sets us apart from other firms," says Laurent. "Everyone knows iManage is the gold standard for law firms. Now we want everyone to know how effective it is for managing the complexity of professional services. We're really proud to have achieved this and hope to inspire others to do the same."

Using iManage has many benefits. Laurent hasn't just achieved a massive win for the company, he's become more efficient himself. "It used to be difficult to find information that was spread across business lines. It's game-changing that I can just go to iManage and find what I need."

The environment is more secure, complies with EU regulations, and simplifies access and identity management for thousands of users. By moving to a managed cloud service, Deloitte Luxembourg can easily track resource consumption to ensure the environment supports growth.

iManage is a platform for the future that drives us forward

Not only has the implementation been a success, but replacing multiple platforms with just one has also saved costs. What's more, Laurent says, "The environment is much more standardized now. Employees don't think twice about where to save or find documents," says Laurent. "Having structured workspace templates in iManage means that even if multiple teams are serving a client, their documents all look consistent and professional."

The IT team is no longer burdened with infrastructure management. iManage is a full SaaS platform fully coordinated and executed by iManage. From an infrastructure and management perspective, they have no worries. This frees up more time to focus on accelerating generative AI projects – such as developing AI agents – with less effort.

iManage is always investing in new features. "With iManage to drive us forward, we don't have to push for innovation. iManage is a platform for the future. It's not that we couldn't build things without it, no – the value is in how much easier it makes those initiatives," emphasizes Laurent. "We can build new capabilities on top of the platform, we know where we are in terms of storage, and we still have some room for growth."

Laurent says the firm is now supported by or equipped with a partner that can drive them toward the next generation of processes that leverage new technologies in the best way. He wonders if they could have done that with an on-prem system or even in the cloud without its partnership with iManage.

“ ”

New hires get up to speed quickly. We publish information on our intranet to assist users and remind people that it's an evolving platform.

Julia Püsiäinen
iManage Platform Owner,
Deloitte Luxembourg

Looking ahead

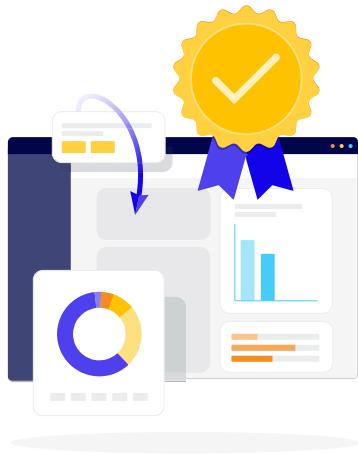
Many of Deloitte Luxembourg's future plans hinge on AI, but first, it's planning to roll out iManage Disposition Manager to set retention policies and perform appropriate disposition of content stored in the iManage Cloud, in line with relevant laws and regulations. By automating the application of retention rules to all documents, Deloitte Luxembourg can ensure compliance, storing documents only for as long as it is lawfully required while also keeping cloud storage costs down.

Next, the team is looking into [Model Context Protocol \(MCP\)](#), which allows AI agents to connect with existing systems like iManage, to add more context out of documents and reduce time-to-value.

MCP will allow those agentic platforms to use iManage data in a seamless way. Deloitte Luxembourg is currently testing the concept, and the first use case could be to assist a selected team in assessing their documents against internal policies. The AI agent would use policy documents in iManage as the point of reference to speed up demonstrating compliance to regulators.

AI agents could also be used to find information instantly as part of due diligence. Instead of manually loading documents, the agent would use the project folder in iManage and run queries to identify documents relating to the task at hand.

“Having iManage integrated with MCP will make working with AI agents seamless. We partnered with the same people who helped with our initial implementation. They already have good inside knowledge of our iManage platform, which will help to develop relevant agentic use cases faster,” concludes Laurent.



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.