![iManage — Making knowledge work]

Feria Tantoco Daos taps into vast specialist knowledge "with one collective brain"

Philippine law firm harnesses 100+ years of collective expertise with iManage knowledge work platform

FERIA TANTOCO DAOS

Industry:

- Legal

Headquarters:

- Makati City, Philippines

iManage footprint:

- iManage Work 10 in the Cloud
- iManage Share
- iManage Drive
- iManage Threat Manager
- iManage Tracker

![BUSINESS NETWORK SOLUTIONS]

About Business Network Solutions

Founded in 1996, Business Network Solutions (BNS) is a trusted technology partner for legal, accounting, and SME sectors, delivering iManage (DMS), CoreMatter (PMS), and Microsoft 365 solutions to enhance efficiency, security, and digital transformation to reduce costs across Asia Pacific.

As a highly respected law firm founded in 1924, Feria Tantoco Daos (Feria Law) can attribute its longevity to a long and prominent history of success across a wide range of industries, as well as the founders' vision of keeping up with the changing times to meet clients' diverse needs. This informed the firm's strategic decision to migrate away from managing its documents using Google Drive and SharePoint and to deploy a suite of document management solutions on the iManage Cloud platform in its place. With the iManage portfolio's rich feature set and native Microsoft integrations, Feria Tantoco Daos was able to create an automated, efficient, and secure workspace for its people. With Business Network Solutions (BNS) assisting in the implementation, and a managing partner of the firm championing the move, Feria Law has achieved a stunning 90 percent user adoption. Employees are now easily tapping into the firm's legal expertise that spans more than a century.

Based in the Philippines, boutique law firm Feria Tantoco Daos specializes in multiple practice areas of corporate law. After 100+ years, it remains one of the most trusted, reliable, and experienced firms in the country, delivering services clients rely on and results that matter.

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Managing Partner, Feria Tantoco Daos

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The business challenge

Designing a digital workplace that empowers staff

Over time, Feria Law has accumulated a vast amount of specialist knowledge, which its lawyers need to turn into highly tailored advice to help their clients succeed.

"The firm's longevity comes from our willingness to adapt and change how we do things to serve clients better, including coming up with innovative ideas that our competitors wouldn't think of," says Michelle Carisse Suarez-Balois, Managing Partner at Feria Tantoco Daos. "Everyone has information at their fingertips these days; what sets us apart is how we use it."

Following a strategic planning session, firm leadership contemplated restructuring their existing delivery of client output. Digital transformation was among the key initiatives discussed that they subsequently implemented, including a complete shift to the Microsoft 365 environment.

The firm also discussed moving to a knowledge work platform that could be fully integrated with Microsoft 365, one that would provide higher levels of security than the tools they were currently using — Google Drive and SharePoint. A more tailored solution was needed to meet the ambitious plans that Feria envisioned to better serve both the organization and its clients.

"There are a lot of documents involved in corporate law, and everyone was storing them in their own way, which made it difficult to find things," says Balois. "We wanted to be able to co-author documents, track versions, and share things more securely than by email. And without central visibility of tasks, partners struggled to allocate work evenly between associates."

Security was also top of mind. Balois continues, "It is imperative that document security is watertight at Feria Tantoco Daos. We need to share documents with clients, but we also recognize that some solutions on the market have vulnerabilities that can be exploited to access folders without permission."

The solution

Automation + communication = successful implementation and adoption

The firm learned through its market research that iManage was the gold standard for integration with Microsoft 365 — and essential to fulfilling its broader aspirations. With support from service provider and iManage partner, Business Network Solutions, the firm implemented iManage Work 10 in the Cloud and a number of complementary iManage solutions.

BNS migrated 200 gigabytes of Word files, PDFs, and jpegs from OneDrive to iManage Cloud over a few weeks.

The implementation team then used iManage-provided APIs to integrate the firm's billing and matter management systems with iManage. This is pivotal because it instantly creates a dedicated workspace and structured folders in iManage when a new client matter is opened. This eliminates manual steps and saves users significant time.

BNS uses iManage Work Connectors and Microsoft Power Automate to streamline repetitive tasks and automate workflows, a strategy the firm is expanding on to promote efficiency.

Balois championed the migration with comprehensive training sessions to guide and inspire the firm's employees — ultimately achieving ~90 percent user adoption.
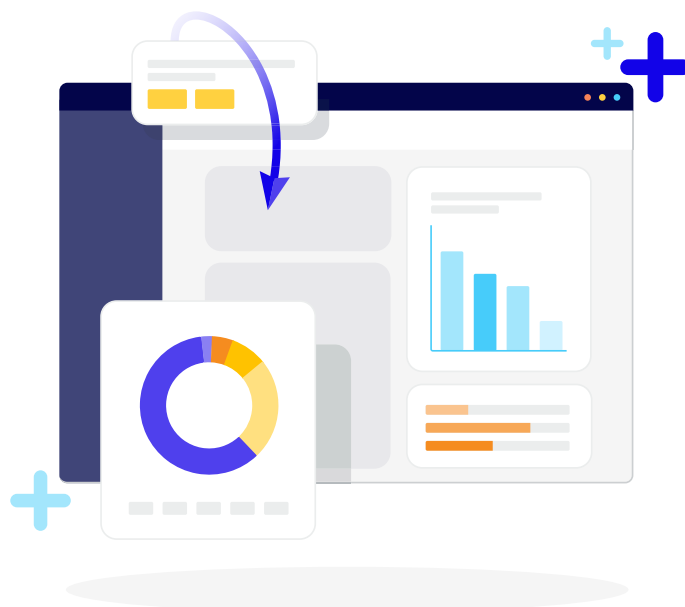
"iManage is not an optional tool in our tech stack, it's a strategic platform that benefits our team and our clients," explains Balois. "To get buy-in, you communicate why change is happening and educate people on how it aligns with the firm's strategic initiatives."

Reports pulled using iManage Threat Manager allow Balois to monitor usage and proactively check in with anyone who may need additional support.

Transforming disparate documents into collective knowledge

iManage Work 10 in the Cloud is Feria Tantoco Daos's single document repository, and partners and associates love being able to jump to recent folders, matters, and documents instantly instead of manually searching and opening them.

"Search is much faster and better with iManage than what we had previously, which was inconsistent and slow," says Balois. That saves time when a client calls and they need to access a document quickly. "We can find documents that contain our search term even if we don't know the filename or which folder they're in."

The firm uses iManage Tracker to allocate tasks evenly among lawyers and for visibility into how each matter is progressing. This helps them keep workloads in balance while making it easy to update clients simply by looking at which tasks are not checked off.

"iManage Tracker automatically reminds us about what we've still got on our plate. That's especially useful in a hybrid workplace because even if someone can't attend an update meeting, we can still see what they're working on," Balois adds.

Feria Tantoco Daos is a hybrid workplace and often has staff on the road. Whether they're at home, traveling between client meetings, or making some last-minute changes at the airport, iManage Drive ensures they can access their documents — even without a stable internet connection.

Meanwhile, iManage Threat Manager creates reports and notifications so Balois can verify that staff document downloads stay within the firm's reasonable download policy. "iManage Threat Manager helps us secure our documents and make sure no sensitive information leaves the firm without our knowledge," she explains. "If someone is uploading, downloading, or printing a significant number of files I can ask why my colleague needs them."

The business outcomes

A thriving workplace delivers better client services

The firm's 90 percent user adoption rate is impressive, but the real success story is that lawyers are working more efficiently, more collaboratively, and more securely.

"Our environment is much better organized. Automated folder creation keeps naming conventions consistent and makes it easier to find things," says Balois. "Busy lawyers don't want to lose time doing administrative tasks. With iManage, they can focus on legal work, and Tracker tells them what to work on next."

This has led to increased productivity. Staff can share iManage links, where changes are clearly marked in documents, and everyone knows who's working on what. This proved invaluable when the firm faced a recent 90-minute deadline to get a deal signed.

Balois recalls: "A counterparty wanted to sign a deal that afternoon, but the contract wasn't settled. In the past that would've sent us scrambling, but with co-authoring, everyone worked together with no duplicated effort or omissions, and we met the deadline. We wouldn't have been able to do that without iManage."

That level of efficiency is vital for areas like mergers and acquisitions, which require intensive due diligence and various specialists working together on different sections of a contract. Where the firm previously would have had one person pulling together relevant clauses from multiple documents and collating them, now each party works on the latest version of the document to create a cohesive file they can send to the client.

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"With our documents all in one place, Feria Tantoco Daos lawyers are operating with one collective brain and a century of experience behind them," says Balois. "That's only possible with iManage."

As for security, iManage means that no one can access files without permission. There are no loopholes or workarounds putting data at risk, and the naming convention makes it instantly obvious if a file isn't stored properly in iManage. This, combined with the additional security offered by iManage Threat Manager, gives the firm total confidence that data is only shared with the right people.

"Clients can see how well organized we are, and the iManage name reassures them that their data is safe with us. If audited, we can easily demonstrate compliance with the built-in security policies that iManage applies to our data," notes Balois.

Balois confirms that the migration to iManage has been a resounding success. Feria Tantoco Daos is the second firm in the Philippines to use the platform, and the first to achieve such high adoption rates. This gives its lawyers a competitive edge and enables them to "crush" the goal of serving clients better.

Looking ahead

Feria Tantoco Daos is rolling out iManage Share so it can collaborate with clients in a secure data room, replacing email links and providing an audit trail of documents that have been shared with the firm. "Clients sometimes ask for confirmation of what they've sent us. With iManage Share, everyone can see the same data, so we won't lose time searching through emails," says Balois.

The firm is also considering a future implementation of iManage Insight+, which will give lawyers curated access to relevant templates and documents for even greater productivity gains.