Bricker Graydon swaps manual processes for modern workflows with iManage Closing Folders

Fast-growing law firm solves efficiency dilemma by automating its closing process and moving document management to the iManage Cloud

Bricker Graydon

Industry:

- Legal

Headquarters:

- Colombus, Ohio, US

iManage footprint:

- iManage Work 10 in the Cloud
- iManage Closing Folders
- iManage Share
- iManage Threat Manager
- iManage Security Policy Manager
- iManage Records Manager

Providing the best possible employee experience is a focus for the technical team at the expanding US law firm, Bricker Graydon. When business was booming and manual processes were slowing workers down, the firm needed to act quickly to make things more efficient. The tedious and time-consuming closing process seemed like a good place to save steps and simplify. Saving paralegals time in the closing process would make a real dent in the overall workload. As part of the broader iManage platform, iManage Closing Folders is a highly regarded transaction management tool. A long-time iManage customer, Bricker Graydon hadn't yet moved from on premises to the cloud. This was the push they needed to migrate their data to iManage Work 10 in the Cloud and, while doing so, adopt Closing Folders for transaction management.

Since then, Bricker Graydon paralegals have been able to rely on automation to close more cases faster. They've gone from using complicated spreadsheets to track closings to being better organized, more efficient, and having greater flexibility in how they work. The firm has even increased its billable hours. Meanwhile, the whole team benefits from moving to the secure, centralized iManage Cloud platform with its scalable workflows and ever-growing suite of knowledge work solutions.

Bricker Graydon has offices across Cincinnati and Columbus, Ohio. The growing Midwest law firm employs 200 attorneys across multiple practice groups in addition to about 100 staff in various other roles.

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Technical Project and Implementation Manager, Bricker Graydon

The business challenge

Making closings easier and more scalable

Legal powerhouse Bricker Graydon was formed in 2023 from the merger of Columbus-based Bricker & Eckler with Cincinnati firm Graydon Head & Ritchey. Business was booming, and the volume of cases surged, but manual closing processes slowed paralegals down. Not wanting to turn any work away, the firm reasoned that a more modern approach to closings would make it faster, more scalable, and reduce the number of manual steps for paralegals.

"We've got an amazing legal team, and they deserve the best tools," says Missy McDonough, Technical Project and Implementation Manager at the firm. "When you have the right people, you hold onto them, and asking paralegals to handle organic growth without giving them a way to work more efficiently would've been detrimental for them."

Meanwhile, Bricker Graydon had observed that the volume of data they were processing and storing using on-premises servers was becoming burdensome for IT to manage. The cloud was calling. Yes, moving to the cloud would relieve the strain of managing the servers from the overtaxed IT personnel, but if they chose the right provider, they could also achieve significant improvements in efficiency, security, productivity, and feature availability.

The solution

Tailored workflows, fuss-free implementation

In evaluating the strongest solutions on the market, Bricker Graydon considered all the above parameters, including each company's roadmap, and narrowed the field to iManage and a single other DMS provider. Ultimately, they decided to move to the cloud platform offered by the vendor partner they'd known and loved for years — iManage.

McDonough herself has more than 30 years of hands-on experience with iManage She watched it evolve from its earliest iterations into the platform of choice for so many law firms. She says she's seen it change the landscape for firms of all sizes, during that time.

"The iManage platform has become even more relevant and tailored for attorneys over the years," she explains. "I've loved watching the company grow while retaining so many familiar faces — the iManage team are really dedicated to helping law firms succeed."

With McDonough's invaluable experience and support, the firm adopted a comprehensive cloud-native knowledge work platform for 300 users with workflows tailored to their needs. The solutions implemented include: iManage Work 10 in the Cloud, iManage Closing Folders, iManage Share, iManage Security Policy Manager, iManage Records Manager, and iManage Threat Manager.

"Implementation was smooth; our staff took to the cloud version of iManage Work and mastered Closing Folders and the other applications quickly. Minimal training was needed to get them up to speed," recalls McDonough. "Adding Closing Folders to iManage Work 10 in the Cloud was unbelievably easy. It felt like it was done in one step."

Automated closings and comprehensive tracking

Closing Folders automates many of the stages involved in closing and produces a professional-looking digital closing book. It also has a log to track progress, so paralegals and legal assistants can monitor at a glance how each case is progressing. All this takes place from the familiar iManage workspace they are accustomed to operating in every day. There's no context switching, which saves them so much time and focus.

The timeline in iManage Work 10 provides excellent version control with detailed information to track how a document has been changed — and by whom — at every stage as a matter progresses. The powerful search is very popular, too. "iManage is worth its weight in gold. Computers don't magically track the level of insight we need alongside their metadata, but iManage does," observes McDonough.

McDonough appreciates iManage Security Policy Manager, which makes it easy to control user access, particularly when attorneys move between departments or leave the firm.

The business outcomes

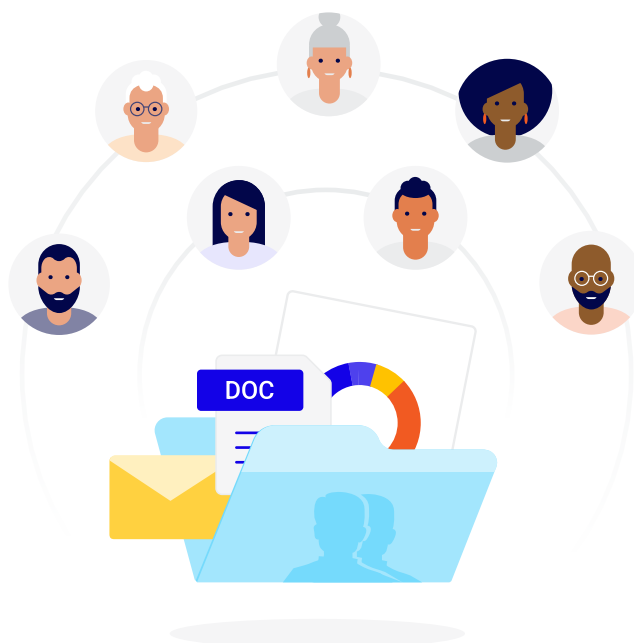**A better closing experience for paralegals and clients**

With Closing Folders, paralegals and legal assistants are more productive and collaborative, and they love being able to do more of their work from a familiar digital workspace.

"We used to have incredibly complicated spreadsheets to track closings," said McDonough. "With Closing Folders, we're better organized, and staff can choose how they work because they're not constrained by technology or rigid processes. Billable hours are up, and so is efficiency."

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> Technical Project and Implementation Manager Bricker Graydon

Presenting clients with branded, professional closing books is also a real advantage, and the firm can provide copies of security documents to assure them that their data is safe in the iManage DMS.

"Moving document management to the cloud was absolutely the right step for us. We've got a highly secure platform that we don't have to manage ourselves," explains McDonough. "We receive incredible support from iManage. They know our firm so well that they can suggest features that would benefit a particular practice group. This helps keep everyone excited and engaged with the platform."

Looking ahead

Thanks to the high levels of security maintained on the iManage platform, Bricker Graydon also feels confident about exploring Ask iManage in the future. "Security is mission-critical at our firm and grows more important every day," says McDonough. " Artificial intelligence (AI) makes a lot of people nervous, so it's great to see iManage proactively securing the environment and developing AI tools that will make a real difference to our attorneys."