

# McCandlish Holton hones its competitive edge by upgrading to iManage Work 10 in the Cloud

Law firm boosts agility by upgrading outdated, on-premises tech for ease of use and quicker turnarounds



**Industry:**

- Legal

**Headquarters:**

- Richmond, VA

**iManage footprint:**

- iManage Work 10 in the Cloud
- iManage Share

Committed to providing strategically oriented, high-value services to each of its clients, McCandlish Holton provides creative business and legal strategies for the marketplace of today and tomorrow. The Richmond, Virginia firm represents professionals and businesses from small start-ups to Fortune 500 companies, looking beyond traditional solutions to achieve favorable outcomes.

When the firm's outdated technology and software began to create workflow problems and raise reliability concerns, their IT Manager, Jonathan Chapman, wanted to act quickly to resolve the issues and keep them from making his attorneys, paralegals, and admins work harder than they needed to. He soon discovered the benefits of upgrading from FileSite, a legacy iManage product, to the current document management system, iManage Work 10, and from on prem to the iManage Cloud.



Whether you are an attorney, a secretary, a paralegal, or an admin, at McCandlish Holton, we all use iManage. Absolute 100 percent adoption.



**Jonathan Chapman**  
IT Manager, McCandlish Holton

**Business outcomes:**

- Vastly superior functionality
- Incredible speed
- Quick, fluid migration
- Zero loss of data
- Easy to use – 100% adoption

Chapman's past experience with large data migrations made him at least a little skeptical about this transition being a smooth, unfettered process – but in the end, he was pleasantly surprised at how fluid the process was, and how successful the outcome.

"iManage Work 10 in the Cloud is very quick," says Chapman. "It's all very fast. And that allows us to be really nimble as a law firm."

## The business challenge

The on-premises technology McCandlish Holton were using was very outdated, and the legacy iManage software for document management was dated, as well. This was starting to cause workflow problems and access and reliability issues. The firm wanted to close the gap between the old technology it was using and the modern web-based technologies now available.

"I said, let's see what iManage has to offer, in an upgrade. My first exposure to Work 10 and the iManage Cloud platform was eye-opening – like, this is amazing! Work 10 is so much more modern than what we are using."

The firm wanted to stay within the same environment, if possible, both to minimize the change to people's basic understanding of how the system operates and to simplify the transition. So, when they saw the vastly superior functionality they would gain simply by upgrading to the current iManage product and platform, they didn't see any point in looking at other options.

"We did a couple of iManage Work 10 demo sessions with some attorneys, secretaries, and paralegals, and they were all impressed, as well. Our people told us, 'We really want to move to this. How can we get this?'" Chapman recalls.

He adds that people really like iManage. Customer reviews are very positive. That increased the firm's confidence in deciding to move to Work 10 in the Cloud instead of exploring other options. "Staying with iManage made the most sense for us," he concludes.

## The solution

### Leagues beyond what we had been using

And so McCandlish Holton migrated everything to iManage Work 10 in the Cloud, and Chapman says the results are leagues beyond what they had been using.

"With our on-prem system, we had to hope that the servers were running happily, and the FileSite users wouldn't get disconnected from Outlook. In Work 10," says Chapman, "Outlook has a separate sidebar, and it can even be undocked and moved to a different screen – which enables people to use their screen real estate more effectively than they could before."

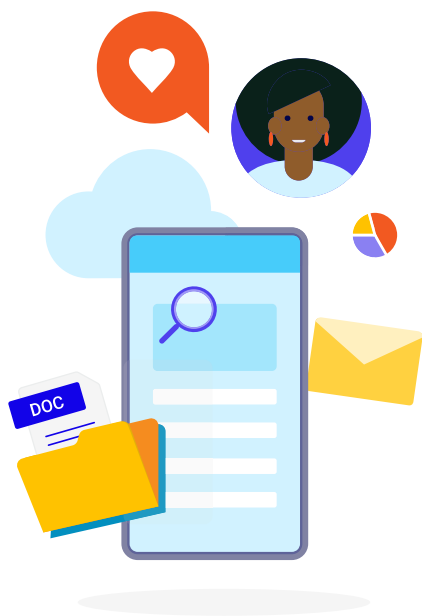
The "life and youth" in the cloud platform, Chapman observes, is significantly better than it is on prem. He says the difference in the speed of recalling documents and how quickly they load and launch in the apps is just incredible.

But under the hood, the uploading process, the filing process – everything about it was incredibly similar. At its heart, he said you can see it's the same platform, just so much



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better. Chapman believes this enabled people to experience the firm's migration less as a hurdle and view it in a more positive light overall.

### **Smooth as silk**

With these large migrations, Chapman says, there are so many questions to answer — and unanticipated problems can make everything grind to a halt. But that wasn't the case with iManage. "The move to iManage Cloud was very, very fluid," he reports. "It was a significantly faster migration than previous migrations I have done."

"We had many documents in a separate archive location. And we were fortunate to be able to reincorporate those documents and their data very efficiently without losing anything."

He adds that putting documents where they belong benefits everyone. Documents filed in iManage are easy to find when needed by anyone who should have access and can quickly be produced for clients.

### **The business outcomes**

#### **Achieving 100% adoption**

"Whether you are an attorney, a secretary, a paralegal, or an admin, at McCandlish Holton, we all use iManage to some degree," Chapman says with pride. "When we train people, I always tell them if they ever used Google Drive or Microsoft OneDrive, they're going to get this very quickly."

And after a few training sessions, he says they were off to the races with it. "Absolute 100 percent adoption," Chapman declares.

He shares that the newer hires get plugged into the ecosystem quickly and easily, embracing Work 10 because the learning curve is not steep at all.

#### **Everything is accessible and where it needs to be.**

Having a single source of truth is the most important feature to the end users at McCandlish Holton. There's no question of where things are going to live. Anyone on the team can say with confidence, yes, this is the document — no matter what version it is, no matter where it's been, this is the doc. Documents are always where they're supposed to be.

Chapman's users also love the integration with Outlook and the auto-filing. "Again, it's being able to say yes, this email is part of this chain, so it will be filed into this location," he says. "It's very helpful to the team."

He admits there were some adjustments regarding folder and root structure, but he says people have really embraced the ability to add their own folders to templates and modify a template if needed.

#### **We're getting our money back with iManage**

Chapman says investing in this kind of platform is a necessity for a law firm, money that simply must be spent. And because they aren't running iManage Records Manager, their storage continues to grow daily, driving more spending on that. "But as far as ROI goes,

I would say that we are still getting our money back with iManage because of how accessible everything is and how easy it is to get everything we need.”

“With iManage Work, users spend less time looking for things,” he continues. “They can very quickly find the documents they need to make a template. They can easily copy and edit that data, save it into the system, and send a link directly to the attorney, who can review it and approve it, and they’re ready to go.”

Chapman recalls that one of the firm’s practice groups had no file structure, no defined matters; just “a pile of documents” in a single location. Incredibly, when the firm moved its data to Work 10, they were able to pull all that content in and give it structure, assigning locations by client and matter. “And that practice group has been significantly more organized than they were before because of it,” he notes.

### **iManage Work 10 in the Cloud makes the firm more competitive**

McCandlish Holton does a lot of corporate law, and Chapman says it’s invaluable to be able to quickly pull up similar documents and craft the openings for an engagement with a new client. Ease of use and speed of recollection enable staff to turn requests around very quickly, and that can make the difference between gaining a new client and losing the opportunity to a competitor.

“We have the flexibility with iManage to act very quickly and compete with firms that are slightly larger than us as well as those that are the same size,” he remarks.



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### **Looking ahead**

Chapman says the firm is looking forward to better co-authoring, better integration, and a better web-only presence.

“As a law firm, our data is confidential,” says Chapman. “We promise clients we preserve data confidentiality and keep their information safe in a certain way.”

The firm finds the iManage offering in terms of AI very attractive because the data never leaves the iManage environment.

“That’s critically important to us. So, I am excited to see that Microsoft Copilot is integrating with iManage AI, excited about the potential of Insight+ and Ask iManage. I can see these being valuable tools for my attorneys and I look forward to our firm being able to use them in the near future.”

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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.