iManage

Making knowledge work

4 LESSONS LEARNED FROM CORPORATE LAW DEPARTMENTS

Best practices and lessons learned from corporate legal departments. Learn how to improve productivity, collaboration, and security by implementing modern document management.

Contents

Four in-house legal teams: best practices and lessons learned

In this e-book you will learn how the corporate law departments in four organizations – global brands that are household names – overcame the challenge of managing large volumes of high-value, regulated and secure documents and emails. Each of these enterprises set out to identify a solution that would enable legal teams to manage information in a way that was more efficient, collaborative, and secure.

Responding to the challenge of **too much** information

According to a survey by McKinsey (October 2020), remote working and or collaboration has **increased by 54%** and will continue to grow. Commensurate increases in the migration of company assets to the cloud and corporate spend on data security have also followed this trend. Corporate legal professionals are uniquely challenged.

Businesses have begun to make the connection between the ability of legal professionals to work productively and securely across a broad range of environments and devices, and the present and future success of their organizations.

More than 95% of the respondents in a recent survey believe that focusing on knowledge work is key to achieving these five business goals...
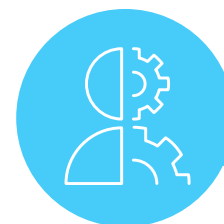
1) Improve employee productivity

2) Manage risk, cyberthreats, and regulatory compliance
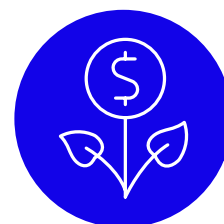
3) Operate more efficiently to reduce costs

4) Be more competitive and more agile

5) Capitalize on opportunities and meet challenges faster

Knowledge workers in corporate law manage large volumes of documents and emails that are subject to very specific regulations and oversight. Businesses can meet the above goals by focusing on knowledge workers and empowering these professionals to get work done — wherever, however, and whenever they need to. Where do they begin?

Isolate the problem, Investigate the options, Implement the solution

Delivering a better experience with tools workers use daily is key to improving workflow and productivity for in-house legal teams. The first step in this process is identifying the pain points and understanding whether the process, the tools, or — as is so often the case — both, need to be part of the change.

The four organizations we've showcased are large, highly complex, global brands. Between them, in 2020, the four companies employed 390,000 people and posted just under 222B in revenue. In total, they have successfully navigated a stunning 447 years of profitable business operations. Their legal departments are no small part of that success.

Each corporate legal department in these examples has taken its own approach to finding the pain points in their organization and mapping strategies to reach their

goals. For companies experiencing similar challenges, the overall business value of hearing the stories is likely to far outweigh any minor contextual differences.

Execute the transformation

Read on to learn about the challenges your peers identified and how they worked through them to a solution. See what best practices they followed and what lessons they took away. Their stories may serve to inspire and motivate your teams to plan and execute a similar transformation in your organization.

Lesson One: Find a solution that works the way lawyers work

> In one memorable example, our team had to pay outside counsel to find a document for them after spending time and effort searching for it.
>
> **IT Manager of a global energy corporation**

Multiple pain points around search and collaboration

The legal team of a global energy corporation found that their enterprise's document management system was not working well for them. They experienced multiple pain points around search and collaboration, particularly in document searches, to identify and reuse legal precedent.

Several challenges hampered them in the existing system:

- Documents and emails were in silos, with no single source of truth

- Lawyers had difficulty sharing information with outside counsel partners

- There were multiple, unsustainable processes for uploading content

- Long approval times for internal access resulted in unnecessary delays

Traditional enterprise content systems are ineffective at saving documents and emails together in the appropriate context. This creates silos of information, making it difficult to get a complete picture of an issue. With information saved in multiple emails and documents, organizations find it difficult to drive efficiency, or effectively repurpose information, and they can unknowingly accumulate security or regulatory risks.

> **"** We needed to build the case for moving beyond our enterprise standard document system and understand the legal-specific requirements. Our evaluation showed that iManage offered a much more complete set of capabilities, incorporating things like email management, smart search, and artificial intelligence. **"**

IT Manager of a global energy corporation

Wanting more than just new technology

The goal was to have a system that works the way lawyers work and empowers knowledge workers to be more productive, collaborative and secure. The legal department set out to find a modern document solution that would meet the specific requirements of their users and their business.

Being methodical in building the business case

By conducting extensive interviews to learn how their lawyers work, and what they needed to be successful, the law department was able to build out the business case in a series of steps:

- **Perform investigative market research:**
  - Attend conferences
  - Talk to peers

- **Justify the need:**
  - Understand the legal-specific requirements
  - Calculate the time being wasted on document search
  - Define the hard dollar benefits and the soft benefits for IT

> **"** What was lacking was an understanding that lawyers are different, and they need a solution that works the way they do. **"**

IT Manager of a global energy corporation

- **Evaluate the options:**
  - Look for must-have comprehensive capabilities that incorporate email management, smart search, and artificial intelligence

iManage creates a single version of the truth by organizing documents and emails in the context of the appropriate project or matter. Advanced email management automates the process of saving emails to the correct location and makes it nearly seamless to the end user, mitigating risk to the organization.

> " For us, implementing a great document management system is level one of success. Level two is taking us to that next level where we are able to extract and leverage and use the information. "

IT Manager of a global energy corporation

Setting a high bar on the user experience

The company anticipated receiving substantial user benefits by upgrading to iManage, including:

- **Better productivity —** increase user adoption and satisfaction through a better, more modern user experience

- **High-value, high-impact work —** empower people to focus on doing their best work by improving their productivity

- **Reduced risk —** matter-centric document organization that maintains transparency of the original context of related materials

- **Stronger partnership with the business —** strengthen the legal services role within the business via enhanced work quality and efficiency

iManage solution:

- iManage Work

Calculating the positive impact and benefits achieved

The company was able to achieve all of their projected outcomes:

- Significant time savings via improved search

- Much improved user experience and ability to reuse legal precedent

- Secure internal and external collaboration

- High user adoption

- Integration with the enterprise content management system

And having reached those goals, they could begin to think about what comes next.

Lesson Two: Find a solution that delivers a global view of your business

> We didn't want to spend our time and resources managing IT infrastructure. We wanted to spend our time and resources solving business problems.

Legal Operations and Global Technology Manager, global restaurant franchise

Fractured view and resource management in a global franchise

This global restaurant franchise wanted a more global view of their business. The corporation's legacy on-premises solution didn't support a global legal department, so their view of the business was fractured. They envisioned a system-wide change in their operations.

The users wanted:

• Better performance

• Better searching and filing

• Easier interaction with documents

Further defining the problem and outlining the path forward

Collaboration with outside counsel was also a pain point. The real estate lawyers needed to exchange very large files with outside lawyers and found it frustrating to manually create the ftp sites required to find and exchange documents and contracts.

The franchise offered some key tips for managing change and driving user adoption:

• Implement ONLY systems that end-users want

• Be able to clearly define the problem it will solve

• Obtain complete buy-in from leadership before proceeding

Defining the solution

The franchise decided a SaaS model was the best solution, as it would enable them to deploy systems globally in a more affordable way while permitting greater flexibility to end-users. They felt a SaaS system would deliver the modern working experience users wanted — when, where, and how they needed to use it. Better performance, better search, and better email integration.

It was a lengthy RFP process but building out total cost of ownership was key. Multiple stakeholders participated in the evaluation and final decision, including IT, Security, Records Management, Compliance, Litigation, E-discovery, end users, and executive leadership.

Seamless collaboration and a global business perspective

The franchise implemented iManage Work in the Cloud for its ability to give the franchise:

• A global view of the business

• A single source of truth

• Seamless collaboration around the world

• A better user experience
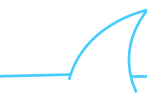
> Once the team decided a SaaS solution was right for them, we found a system that met our needs — and iManage checked all the boxes.
>
> Part of our success was working with our implementation partner and iManage in their delivery of a fantastic tool, really best in class.

Legal Operations and Global Technology Manager, global restaurant franchise

> "Use leadership to push accountability and adoption – this is a big deal and crucial in a corporate context.
>
> I've done a lot of upgrades and a fair number of system conversions, but I've never actually had users come to me saying, 'Thank you so much for doing this,' the week of the deployment."

Legal Operations and Global Technology Manager, global restaurant franchise

Leadership is crucial in a corporate context

Much of the time people spent trying to get information in and out of the content repository was essentially refunded and applied to higher value activities.

With a single, secure, global environment that respects geographic isolation, and industry-leading security, IT could shift their focus to user adoption and enablement.

IT planned to ensure adoption of the solution by:

- Over-communicating the "why" of the change to end-users
- Vividly describing what work life looked like with the new system
- Promoting end-user involvement and excitement to sustain "buy-in"
- Keeping the system and the "why" top of mind with continuous training and support

> "What I do to continue marching to the future state is to think strategically about decisions we need to make now, how those advance us to that long-term goal."

Legal Operations and Global Technology Manager, global restaurant franchise

They didn't just rely on a frictionless user experience to inspire adoption — they had also called upon company leadership.

Think strategically, execute with flexibility, stay adaptive

The IT Manager observed that iManage spent a lot of time figuring out how lawyers like to work and delivered on the promise of a better user experience. But the company itself drove the legal operations transformation with clearly defined goals and the wisdom of experience.

iManage solution:

- iManage Work in the Cloud
- iManage Security Policy Manager
- iManage Threat Manager
- iManage Records Manager

Lesson Three: Find a solution that makes security invisible to users

> "We wanted to develop more robust governance and audit capabilities to protect ourselves and our clients from a security breach."
>
> **IT Manager, global media and entertainment enterprise**

A security breach hit close to home and compelled action

After learning of a security breach in their industry, this global media and entertainment enterprise decided to take steps to ensure that their business was protected against a similar event. Reinforcing the security protections for their legal documents and proprietary studio work product would be the first step.

Concern that new technology will inhibit user adoption

The enterprise understood that changing the work habits of a broad range of business users with limited patience for learning new technology would be challenging. At the same time, they knew that adoption would be key to a successful implementation.

This knowledge informed the two primary goals:

- Improve security and governance with audit capabilities
- Minimize disruption to user workflow to promote adoption

> "The enhanced security is virtually invisible to users."
>
> **IT Manager, global media and entertainment enterprise**

Intuitive, easy-to-use interface is a must-have

An intuitive and easy-to-use interface was a must-have to encourage broad user adoption and help to ensure that valuable documents and emails were retained and secured.

> "iManage replaced the studio's network of unsecured shared drives with a fully governed, trackable, and audited location to manage content. When we rolled iManage. Work out across our studio and entertainment groups, the users were up and running in minutes, without the need for any formal training or a change in work habits.
>
> Subscribing to iManage Cloud services gave us confidence that our protection would stay ahead of growing threats, keeping our legal documents and proprietary studio work secure."

IT Manager, global media and entertainment enterprise

The media giant chose to replace and secure the studio's network of shared drives with iManage Work because they met the criteria the company had agreed on.

Work provides a single, secure project location to manage content that is:

• Fully governed, trackable, and audited

• Intuitive, easy-to-use, with a single, secure project location

Confident that our protection will stay ahead of growing threats

Highly efficient search capabilities and multiple other benefits provided additional incentive to go with iManage. Benefits realized by the media enterprise with the iManage implementation include:

• A single, secure project location for all content

• Comprehensive security and governance with a full audit path

• A better user experience driving strong user adoption

• Integration with the enterprise system

• Positioned to take advantage of iManage AI at a future date

iManage solution:

• iManage Work in the Cloud

Lesson Four: Find a solution that enables better collaboration between departments

Confronting collaboration challenges head on

A large insurance enterprise found it difficult to enable secure collaboration between its legal professionals and business users. They were maintaining three different classic client environments, which was a significant drain on their resources, and the enterprise wanted to move away from managing so much infrastructure.

They shared some other challenges, including:

- Multiple shared drives and costly maintenance

- Less than ideal workflows that were affecting productivity

- A need to streamline their document retention policies

- The desire to improve a sub-par remote user experience

Seeking a single vendor platform that checks multiple boxes

The concept of a single vendor platform that offered legal document management with extended functionality was very attractive to the team. But many solutions they had found previously proved difficult to set up, raised questions about security, and required their users to navigate between different systems — which was a problem they were already trying to solve.

> "We were already an iManage customer, so we considered all the angles of a move to iManage Cloud, conducting a detailed evaluation of costs over a three-year timeframe."

Senior Legal Operations Analyst, multi-national insurance enterprise

They created a wish list of capabilities and outcomes:

- Enable secure collaborations with outside counsel
- Make remote work easier
- Reduce infrastructure costs for IT
- Improve agility and scalability to deliver better service

Additional asks included a cleaner user interface for end users, easier search and navigation, faster speeds, and better performance.

Investigating the viability of moving to iManage Cloud

In the first analysis the enterprise found that the infrastructure and licensing costs of moving to iManage Work 10, when weighed against the administrative costs of managing multiple classic client environments, were approximately equal on a pure cost basis — but they saw clear benefits in reduced administration and improved agility.

Their second analysis centered around end user functionality requirements, mapping desktop features against Work 10 capabilities. In this, they detected minimal differences — and substantial benefits — in migrating to iManage Work in the Cloud.

Inspiring strong user adoption by leveraging internal iManage advocates

The legal operations implementation team identified and worked with advocates from each in-house user group, explaining new capabilities and the roadmap, investing time in winning them over. These advocates became the company's Work champions prior to and during the migration.

> "In the old client, the real estate law team scrolled through hundreds of workspaces to find the one they needed. But with the 'Recent' tab and advanced filtering, Work 10 enabled them to work far more efficiently at the document and email or workspace level."

Senior Legal Operations Analyst, multi-national insurance enterprise

Some adoption strategies the team employed included:

- Planning a staggered rollout to optimize user adoption and engagement

- Holding "lunch 'n' learn" sessions to tailor training by function

- Making support, tools, and assets widely available to users

Enabling seamless and secure collaboration — and achieving much more

Starting with the goal of enabling seamless and secure collaboration, the enterprise achieved a great deal more. Collaboration with both internal and external audiences, using iManage Share, was:

- Seamless

- Integrated

- Secure

- Governed

"We try to get every doc into iManage. Users say the system is much more intuitive. They love it. One of our users remarked that Search had changed their life."

Senior Legal Operations Analyst, multi-national insurance enterprise

This increased user adoption, enabled better relationship management, and enhanced the overall value of migrating to the iManage platform. IT support requests were reduced from 4-10 per day to less than one. The IT team also met their goals for reduced infrastructure costs, scalability, and agility.

iManage solution:

- iManage Work in the Cloud
- iManage Share

Real customers, real numbers, **compelling outcomes**

The stories told here reflect the experiences of real-world customers, and our customer outcomes are compelling. They've focused their efforts where and how legal professionals get work done, both figuratively — in documents and emails — and literally — at home, on the road, or in a client's office.

A study by Forrester modeled a single business from the combined data of six organizations. This aggregate business achieved a 378% ROI over three years by replacing a legacy document management system, shared drives, and personal drives, with iManage Work. Faster search and upload led to significant improvement in end-user productivity.

The average savings in search time per document was 7 minutes. Legal team members also saved an average of 3.5 minutes on each document upload through the auto-assignment of metadata and 30 seconds per email-save via predictive filing. Given the frequency of those actions. an average annual savings of 240 hours per user.

By implementing a modern document management system and practices, these companies were able to drive dramatic business improvements, including composite organization benefits of $4.37 million realized over three years.

iManage Work solves daily business challenges encountered by legal professionals and organizations like yours, every day.

iManage

Making knowledge work