

Leading Brazilian law firm takes a modern approach to document management

Lazzareschi, Hilal, Bolina & Rocha Advogados uses iManage solutions to enhance lawyer empowerment, security, collaboration, and compliance.



LAZZARESCHI, HILAL, BOLINA & ROCHA
ADVOGADOS

Industry:

- Legal

Headquarters:

- São Paulo, Brazil

iManage footprint:

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



About Totvs

Totvs is a leading Brazilian software, services, and technology company. It serves more than 70,000 customers across 12 sectors and has three focus areas: enhancing business performance, implementing management systems, and providing fintech solutions.

One of the most respected and admired law firms in Brazil, [Lazzareschi, Hilal, Bolina & Rocha Advogados \(LHB&R Advogados\)](#) practices civil and corporate law in court and arbitration, as well as providing consultancy and legal advice. Based in São Paulo, the firm and its partners have received multiple awards from Chambers and Partners, Best Lawyers, and Análise Advocacia Magazine.

The firm wanted to modernize its approach to document management. Low adherence to naming conventions made it difficult to find the right information in the on-premises system they used. Security and backup solutions were costly and complex to maintain. The firm knew that the right system would give their legal team more freedom to focus on producing high-quality work for clients. After an extensive evaluation process and supported by Totvs, an iManage partner in Latin America, the firm rolled out a suite of iManage solutions on the iManage Cloud platform. The lawyers at LHB&R Advogados now securely access their documents from anywhere. They collaborate securely both in-house and with clients using iManage Share and maintain control and transparency over the firm's data with iManage Threat Manager, while easily demonstrating their compliance with client requirements.



We worked hard to keep our on-premises environment secure, but there was still a risk. Now iManage is our secure environment. The platform is scalable without forcing us to invest in more on-premises technology or backups.

Dr. Caio Julius Bolina

Partner, [Lazzareschi, Hilal, Bolina & Rocha Advogados](#)



Business outcomes:

- Efficient document management
- Easy collaboration
- Robust security
- Simplified audit compliance



Introducing iManage was the start of a new era for our firm. It inspired us to have conversations about where we wanted to go in the future and how technology could help us get there.

Guilherme Rauen Silva Jardim

Partner, Lazzareschi,
Hilal, Bolina & Rocha
Advogados

The business challenge

Finding and collaborating documents

LHB&R Advogados handles large, complex cases that require the firm's unique expertise. Providing bespoke, high-quality services requires that the legal team is able to find the right documents, collaborate in-house with other practices and with clients and apply their knowledge without the distraction of underperforming technology or tools.

The firm's hybrid workplace creates added pressure to make documents accessible from anywhere. And while they had a file directory and dictates around file saving and naming conventions, these were not reliably followed, making it harder for staff to locate and share the correct files.

"Documents were filed by client or case, but unless they were named correctly, it was difficult to find them," explains Guilherme Rauen Silva Jardim, a partner at the firm. "It also increased the risk of data loss and duplicated effort. If we couldn't find a document, we had to re-create it, which is time-consuming and inefficient."

When the team collaborated with other firms, they shared documents using OneDrive and email links. Working on the same document on the same document in real-time or even passing the document back and forth created version control issues.



Protecting client data

LHB&R Advogados must also assure clients that their data is secure and accessed only by authorized personnel, in compliance with national data protection laws. To achieve this, they protected on-premises servers with firewalls, antivirus software, regular backups, and password protection for sensitive data.

"We wanted to move to the cloud both to increase security and to take back ownership of our document management," says Dr. Caio Julius Bolina, who is also a partner at LHB&R Advogados. "IT could restrict access to files using passwords, on request, but we worried about the potential of sensitive data being compromised if an unauthorized person obtained the password."

The solution

A staged migration to Brazil's leading knowledge work platform

Following an extensive evaluation, LHB&R Advogados implemented a suite of iManage solutions, including [iManage Work 10](#) in the [Cloud](#), [iManage Share](#), and [iManage Threat Manager](#). The partners were impressed by the platform's high levels of security and intuitive user experience.

The firm's implementation partner, Totvs, helped them choose the right solution. Despite having its own document management platform, Totvs recommended iManage as the best fit for their needs. "iManage is the most popular document management solution in Brazil and has great local language support documentation," notes Jardim.

A staged approach made the transition more manageable for LHB&R Advogados. Totvs provided training and set up the platform and system configuration in Portuguese. LHB&R Advogados re-evaluated their approach to document management and introduced new naming conventions to ensure staff could find the right documents in the new system.

The firm's data was deduplicated and migrated into iManage over a three-month period. They brought the most-used and most important Word documents over first and migrated PDFs, emails, and third-party files at a later stage. This helped staff acclimatize to the platform without feeling overwhelmed.

LHB&R Advogados created training manuals tailored for different roles and made learning resources available on demand.

"Guilherme led a very smooth transition," says Dr. Bolina. "With his support, people got comfortable with iManage quickly — and today we have 100 percent user adoption across lawyers, interns and admins."

The business outcomes

Strong, comprehensive platform in the cloud

Legal work at LHB&R Advogados centers around iManage Work 10 in the Cloud. Staff can access the right documents from anywhere and enjoy an enhanced search experience. Other popular features include timestamps, which create a timeline to track a case's progress, and co-authoring capability. This enables colleagues to collaborate on documents in real time without experiencing version control issues.

"No matter where a file is saved with iManage we can always retrieve it using search," Jardim reports. "We can search by reference, client, case, or keyword, and iManage even finds files that weren't saved with the proper naming convention."

The team also uses iManage Share when sharing documents related to complex cases with clients or knowledge workers from other practices. Because Share is part of the iManage platform, this is more secure and efficient than using OneDrive.

Meanwhile, iManage Threat Manager monitors who is accessing documents, providing unprecedented levels of transparency into user behavior. Any unusual or unauthorized activity, such as a high volume of files being downloaded, is flagged, alerting the firm to potential risks.

Empowered workers and a secure environment

By adopting iManage Threat Manager with its iManage Work 10 in the Cloud implementation, LHB&R Advogados boosted security while reducing IT costs.

"We worked hard to keep our on-premises environment secure, but there was still a risk," says Dr Bolina. "Now iManage Cloud is our secure environment. We can track and block unauthorized access and move sensitive data to secure folders to protect it. The platform is scalable without forcing us to invest in more on-premises technology or backups."

LHB&R Advogados now has a modern knowledge work platform in iManage and has adopted more effective ways of working. This benefits current employees while it helps the firm attract next-generation talent — young professionals who expect a seamless digital experience.



One of the partners at our firm led a very smooth transition. People got comfortable with iManage quickly with his support, and today we have 100% user adoption across lawyers, interns, and admins.

Dr. Caio Julius Bolina
Partner, Lazzareschi,
Hilal, Bolina & Rocha
Advogados

With iManage, LHB&R Advogados can work more efficiently on the complex cases it's known for. They have total confidence that data is secure and can find the right information quickly and easily. By empowering staff to focus on knowledge work and collaboration, the firm can protect its reputation and continue to attract the country's top legal minds.

The start of a new era

"Introducing iManage was the start of a new era for our firm," says Jardim. "It inspired us to have conversations about where we wanted to go in the future and how technology could help us get there." Jardim credits Totvs with helping the legal team use iManage with confidence.

The firm increased its productivity significantly with iManage while virtually eliminating the risk of data loss and duplication. Its powerful search capability speeds up draft reviews and collaboration with colleagues, clients, and partners by enabling people to find the right document every time. This means they can prepare paperwork faster and they never have to recreate lost documents.

"Now our team can't imagine life without iManage, which enables them to work faster and focus on the most satisfying and valuable tasks," remarks Jardim. "Clients, too, are impressed by iManage Share. It simplifies audits and reassures them that their documents are secure."

Looking ahead

With the implementation live, LHB&R Advogados is looking to the future. They'd like to tap into generative AI to further boost efficiency. The team envisions using generative AI within iManage [\[Ask iManage\]](#) to suggest text as staff type, saving time. They also want to create templates based on the library of approved documents stored on the platform [\[iManage Insight+\]](#). This would help to speed up writing contracts, pulling an adaptable template together based on similar historical cases that staff can tailor for each individual matter.

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 to learn more.