

ROBBINS RUSSELL UPGRADES TO SUPERIOR DOCUMENT MANAGEMENT IN THE CLOUD

iManage Work in the cloud offers better search and enhanced security over competitor and legacy system



ROBBINS | RUSSELL

Robbins, Russell, Englert, Orseck & Untereiner LLP

Industry:

- Business services

Headquarters:

- Washington DC, USA

iManage footprint:

- iManage Work in the cloud
- iManage Security Policy Manager

Benefits:

- Enhanced organization and security compared to legacy system
- Version indexing ensures all information is searchable
- Audit trails make compliance simple

As Robbins Russell grew from five founders, they discovered their shared network drive no longer served as the best solution for their document needs. After reviewing competing products, they ultimately chose iManage Work in the cloud for the ability to search for previous versions of files. The firm found that iManage Work in the cloud offered the features they wanted with the security and audit trails their clients required.

Robbins Russell is a boutique firm that provides experienced representation in high-stakes legal matters such as trial litigation; Supreme Court and general appellate litigation; and government investigations and enforcement proceedings. Their clients include numerous Fortune 500 companies, financial institutions, hedge funds, defense contractors, technology companies, and major accounting firms. They also represent a wide variety of mid-sized companies, government entities, associations, and individuals.



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Dana Wesley Sarti

Litigation Support Manager, Robbins Russell

The challenge

A growing firm and growing volume of files

Founded in 2001 by five partners, Robbins Russell had grown to include almost twenty attorneys when Dana Wesley Sarti, Litigation Support Manager, joined the firm several years ago.

“When the firm started out, they had been operating with the thought of ‘We don’t need bureaucracy,’ which they interpreted to include all these systems [like document management],” explains Sarti. Instead, the firm relied on a shared network drive which initially had little required structure. Although the firm did slowly impose more organization in their files, they found that with a growing firm and growing file numbers, their ad-hoc process was no longer cutting it.

Sarti elaborated, “I would say that [with our previous shared network drive] we had a very structured approach to it but it was not standardized ... Everybody had a grasp that we needed our data organized, and we had an increasing need for version tracking where documents were going out to clients and co-counsel and coming back, and we would be wondering who held the pen, so to speak.”

The volume of work combined with the volume of documents was leading to increased risk of mistakes and more wasted time. The firm was now aligned on the need for a new document management system (DMS), and they were also aligned on another crucial element: they didn’t want an on-premises solution.

“We don’t have an in-house IT person, and as a small firm, we didn’t want to pay to maintain whole new boxes in our server room ... so putting [the DMS] in the cloud seemed like a really good thing for those reasons,” said Sarti. Perhaps even more importantly, the firm’s lawyers were often out of the office in meetings or in court, which meant the mobility the cloud offered was paramount.

The solution

Version indexing crucial to the firm’s DMS choice

With the cloud in mind, Robbins Russell started reviewing their DMS options. Although they considered several competing products, they ultimately chose iManage based on a critical feature: version indexing.

“We chose iManage because [the chief competitor product] could only index official final versions. You could not search for the interim versions [using that product] and you could in iManage. We decided that when it comes down to it, that was going to be a feature we needed,” said Sarti.

Making sure everyone can find what they need

To accommodate different search styles and ensure that everyone could find what they needed in iManage Work, Robbins Russell convened several pilot groups to find out what their users were looking for in their new document management system. As a result of this process, the firm was able to set up their folder structures to reflect how their users actually worked.



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With the right folder structure in place, Robbins Russell began training their users extensively in order to increase adoption rates. As Sarti put it, “Don’t cheap out on the training.” The pilot groups and training proved to be the secrets to success for Robbins Russell. “Because we got it up and we got it rolling and we got it right, our onboarding has been easy for subsequent users,” Sarti said.

The benefits

Consistent uptime, everywhere

Right away, Robbins Russell users benefitted from the industry-leading, reliable uptime. This was an improvement over their previous on-premises shared file drive, which needed backups and updates that required the system to be down.

Sarti enthused, “I think that’s one of the things that helped make the pain of learning these new systems better, was immediately it was always available. That was fantastic.”

With the consistent uptime and superior mobility that iManage Work in the cloud offered, users could access their files from anywhere. This was a huge plus for when their lawyers and staff were working outside of the office and made it much easier to remain productive during the pandemic.

As Sarti explained, “Our users were already mobile ... Many of them were already getting to iManage from the web anyway, without having to go through a VPN or the office search. Being in the cloud was so liberating in terms of knowing where stuff is and being able to get to it no matter what’s going on back at the office.”

Security and audit trails prove invaluable

Post-deployment, one of the first things that Robbins Russell did was add iManage Security Policy Manager (SPM). For a small firm like Robbins Russell, SPM simplified security considerably. Previously, the firm had relied on active directory groups, which was more cumbersome to set up and see document security at a glance. Now, SPM makes it easy to know who has access for reading and/or authoring, and who did what when.



In addition to the security concerns that SPM addressed, iManage Work offers another key feature: audit trails. Robbins Russell has several clients that have HIPAA requirements. With their original file system, Sarti said, “The ability to produce documented audit trails for access to information that they are also obligated to keep confidential, that was something that was just horribly onerous until we got our data into iManage.” Now, the audit trails in iManage Work make meeting these requirements much easier.

Satisfied users and clients

Although the firm experienced some growing pains during their transition to iManage Work in the cloud, Robbins Russell has found that their users adapted well to the new technology.

“We have actually done very little formal training for the last two years as iManage Work is that intuitive,” said Sarti.

The firm’s clients have also been satisfied with the change.

“Our clients were encouraged to learn that the data in iManage Cloud was at least as secure as it had been in the legacy system and they all seemed quite comfortable with the move,” Sarti said.

Looking ahead

After several years of success with iManage Work 9, Robbins Russell is now taking steps to move to Work 10. They are also, in Sarti’s words, “following with great enthusiasm” the work that iManage is doing with Microsoft, particularly the integration with Microsoft Teams.

But for now, Sarti is happy with the firm’s choice to move straight to iManage Work in the cloud for their document management. “The amount of overhead and the amount of expertise one has to have in house compared to the cost of having iManage in the cloud makes the choice [between on-premises and the cloud] in my mind, not even a competition.”

About iManage™

iManage is the company dedicated to Making Knowledge Work™ Its intelligent, cloud-enabled, secure knowledge work platform enables organizations to uncover and activate the knowledge that exists inside their business content and communications. Advanced Artificial Intelligence and powerful document and email management create connections across data, systems, and people while leveraging the context of organizational content to fuel deep insights, informed business decisions, and collaboration. Underpinned by best of breed security, sophisticated workflows and governance approaches, iManage has earned its place as the industry standard through continually innovating to solve the most complex professional challenges and enabling better business outcomes for over one million professionals across 65+ countries. Visit www.imanage.com to learn more.