

Adams and Reese embrace the future of work with iManage

Twenty-year partnership still pays dividends with increased productivity and collaboration



ADAMS AND REESE LLP

Industry:

- Legal

Headquarters:

- New Orleans

iManage footprint:

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

With 20 offices strategically located across the US, Adams and Reese lawyers and advisors are skilled and ready to help clients achieve their goals and make their lives easier. They take a personal, hands-on approach to every issue, challenge, and opportunity their clients face; with a solid ability to produce results and deliver value. Over two decades, the expanding law firm remains a loyal customer and the partnership has flourished.

The business challenge

Long-term iManage customer

Adams and Reese have been iManage customers for more than twenty years. Bill Vance has been the firm's Chief Technology Officer for five of those years and has used iManage products with several other firms.



At Adams and Reese, we don't view our major software solutions as vendors, we view them as partners. I believe that iManage is a great partner for us. They listen to the things we need to do and design new solutions to help us be even more productive.



Bill Vance

Chief Technology Officer, Adams & Reese

Business outcomes:

- Better search and security
- Sensitive information is locked down
- No duplication of work product or effort
- Increased productivity and collaboration

Part of Vance's job is understanding and adopting new technology. He evaluates new products to identify whether they are a good fit for the firm. Will it make their lawyers more productive or make the firm more secure? Is it within the firm's cost structure?

A third-party file sharing solution

Somewhere along the way, the firm adopted a product from a different vendor to facilitate sharing their documents. This meant that, while their documents, emails, and other communications were subject to the file protocols, governance, and security of the iManage platform, these materials had to be taken out of iManage to be uploaded to a separate platform external to iManage for sharing. This created some issues.

"People were taking documents out of iManage Work and saving them to their desktop, then uploading them into Citrix ShareFile," says Vance, who realized, "Now we have a problem."

As Vance explains, they had no way of knowing with any certainty what the most current version of that document was. Multiply that scenario by all the documents, emails, and other communications shared every day across an organization comprising hundreds of users, you can calculate how quickly that uncertainty snowballed into a version control headache for the firm, not to mention the question of governance.

Along with version control, security is top of mind for Adams and Reese. Vance's team runs mandatory monthly security training and tests people's instincts. When someone fails a phishing attempt that the team initiated, they explain why and send them another attempt to give them another chance.

And since the firm takes security so seriously, it was only a matter of time before they would move their document management into the cloud. When the firm was ready, Vance took on this challenge, as well.

The solution**Welcome to iManage Share**

"Needless to say, iManage Share was revolutionary for us," says Vance.

First, because the work product — along with any changes — stays secure and accounted for in the document management system, iManage Work, when using iManage Share. Second, because the firm isn't paying for a separate solution to exchange files with clients. Share is built into the iManage environment they already have.

"Having all of our documents in one location, accessible by both our attorneys and clients through the workspace, is absolutely amazing. iManage Share has done a great job for us," Vance reiterates.

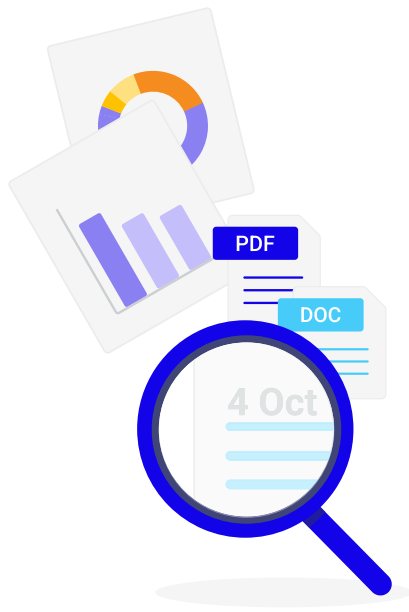
Mitigating threats

The firm also uses iManage Threat Manager, which lets Vance's team set a flag, for example, when someone has downloaded an excessive number of documents. Unless they're going to trial, Vance says that can be a signal that they're leaving the firm. His team can let the appropriate people know so they can decide if something needs a closer look.



Having all of our documents in one location, accessible by both our attorneys and clients through the workspace, is absolutely amazing. iManage Share was revolutionary for us.

Bill Vance
Chief Technology Officer,
Adams & Reese



Vance also uses the application to help the firm maintain compliance with client requirements. Given that the firm handles more than 20 million documents, meeting varying expectations for certain reports to be run on a weekly, monthly, or quarterly basis can be a significant challenge.

“With iManage Threat Manager,” Vance says, “I can set the rules to meet each client’s expectations for reporting on their subset of documents, and that saves me a lot of effort.”

Moving to cloud

The firm was using iManage on premises when Vance decided to move their DMS to the cloud. When he was with another firm, Vance had experienced a “quite disastrous” implementation of a DMS product from a different vendor. He says the firm didn’t understand the structure, and the vendor just said to keep the number of cabinets (or document libraries) as minimal as possible.

Everyone thought they needed their own cabinet to be secure, so they set it up with 13 cabinets. They didn’t know a search for a document would take about a minute per cabinet – or 13 minutes. This was far too long for anyone to wait for a response, to put it mildly. So the system wasn’t implemented correctly. “Going back and cleaning that up was obviously a nightmare,” recalls Vance. He wasn’t inclined to relive that with Adams and Reese.

Why throw away 19 years of training?

And indeed, why take unnecessary risks when your users are satisfied with iManage? Teaching people how to use a new system is the biggest hurdle with change, Vance reasoned, and Adams and Reese had already invested 19 years of user training on iManage at that time. Why throw away that breadth of experience?

Vance moved the firm’s data to iManage Work 10 in the Cloud and has not looked back.

The business outcomes

In Work 10, it’s all right there

“Freeing people from those long ‘trees’ in Outlook is absolutely amazing,” says Vance. “Users just open the Work panel and it’s all right there. The search is better in iManage Work 10. Finding the documents is better. It just works beautifully, and it’s made everybody’s life wonderful.”

Vance says that the improved file structure, compliance, and search in iManage Work 10 help the firm service clients better and save them from duplicating work product or effort. He also knows that extremely sensitive information can be locked down in iManage, and he can be confident that no one knows it exists except the client and lawyers who are involved.

“Our main product is knowledge,” says Vance. “It’s written knowledge that we store in our document management system. So we take security very, very seriously, and in particular the security of our document management system.”

Preserved knowledge, immediate access

Adams and Reese have locations all around the US, from Denver to Washington, DC, down to Houston, New Orleans, and Tampa, Florida. They’ve changed from a librarian role to a knowledge manager role and are working to catalog and categorize physical and virtual assets throughout the organization.

He notes that paper libraries are costly and harder to maintain and that things quickly go out of print. So the firm is focused on expanding its virtual knowledge. They capture anything firm-related that’s virtual, tag it, and make it available across the entire platform.

Better search tools give immediate access to someone in the Denver office who needs to see construction law in Florida. They don’t have to call Florida and say, “Can you send me the book?”

“We’re very excited about how all this knowledge is coming together in our own document repository, and understanding the tools is very important,” says Vance. “Great metadata makes our search capabilities more powerful and enables us to better share our knowledge across the organization.”

Working toward 100 percent adoption

Vance estimates Adams and Reese is at about 85 percent adoption of iManage Work. This is good, but they are looking at iManage Drive and the new iManage AI email management tool (Mailbox Assistant) to see if these tools can help them bridge the gap to 100 percent. They are looking at Ask iManage, as well. Vance believes those three “carrots” can help grow their adoption to the next level.

“Our productivity and collaboration have increased immensely, particularly with the installation of iManage Work 10 in the Cloud,” says Vance. “Collaborating as one unit is how we serve our clients best, and that means we need to have all of our data in one location.”

Looking ahead

A busy year ahead

Vance believes AI is going to transform the way that legal professionals work, and Adams and Reese is excited to see all the AI products being offered by iManage.

“We have plans to roll out AI, but we don’t believe in a one-size-fits-all approach. So we’re looking at each of the products we use, how they specialize in AI, and how we can take advantage of those resources,” says Vance.



iManage is a great partner for us. They listen to the things we need to do and design new solutions to help us be even more productive.

Bill Vance
Chief Technology Officer,
Adams & Reese

After seeing what's going to be available, Vance says he told his iManage administrator, "You're going to be very busy this year." And she replied, "Yes, I am."

iManage Mailbox Assistant is top of mind, here. Email management is very important to the firm. But, Vance adds, "Ask iManage is what everybody's been asking for. It's going to save so much effort."

A minute to search a single document for a piece of text, such as a clause, multiplied by 30 documents is 30 minutes. "With Ask iManage all 30 documents come up in a table, each with a short summary, and people can quickly and easily find exactly what they're looking for," says Vance, excited. "That saves people so much time."

Vance points out how this also enables their professionals to surface the knowledge the firm already has – from work that's known, tried, and proven. This results in a better work product – and that benefits both the firm and its clients.

"At Adams and Reese, we don't view our major software solutions as vendors," says Vance. "We view them as partners. I believe that iManage is a great partner for us. They listen to the things we need to do and design new solutions to help us be even more productive."



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.