

BTO Solicitors scores next-level productivity and an AI-ready platform with iManage

Scottish law firm invests in the industry-leading document management system to redefine the lawyering experience

**Industry:**

- Legal

Headquarters:

- Glasgow, Scotland, UK

iManage footprint:

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

Partner:

- Quorum has more than 25 years' experience providing consultancy, managed services, and software development to customers across a number of sectors. Its focus on honesty, transparency, and openness underpins its long-term customer relationships.

Scottish law firm BTO Solicitors has nurtured a culture of continuous innovation for decades. By adopting the best productivity tools as they become available, the firm decided to move its document repository to an AI-ready, cloud-native solution. And after migrating to iManage Cloud, BTO staff enjoy a first-class user experience, secure, well-organized documents, and streamlined integrations with other systems.

[BTO Solicitors](#) (BTO) is a modern, full-service legal practice with strong roots in the Scottish business community. Its tenacious, practical, client-focused approach and diverse range of expertise stem from solid foundations dating from the 1850s. With offices in Glasgow, Edinburgh, and Helensburgh, BTO is proud of its positive impact on the success of businesses and the personal lives of individuals through the generations.

The business challenge**Increase the firm's growth potential and profitability**

BTO's 235 partners and staff rely on document management to store and share information internally, as well as with clients and third parties.

“” iManage doesn't just benefit our existing workforce, it's a sustainable investment in our future success.

David Walker, Chief Operating Officer, BTO



Business outcomes:

- IT overhead and downtime slashed
- More productive and efficient
- Client data is secure
- Tech-forward and AI-ready

As it moves through a five-year journey of sustainable and profitable growth, the firm is dedicated to bringing its positive, brave, insightful, and supportive values to even more clients, delivering an increased range of services to a wider client base.

"We have client matters, personal user data, and common firmwide documents," explains Alan Fisher, Head of IT at BTO. "We need to be able to save and access files easily, do searches and find specific content quickly, and share matter-related documents with clients and third parties securely."

The future potential for artificial intelligence (AI) also motivated BTO to begin looking for an AI-ready platform.

"As with other firms in the legal sector, we see the future possibilities of AI to work more efficiently and decided to prepare our environment to adopt the best productivity tools as they become available," says David Walker, Chief Operating Officer at BTO.

The solution

Market-leading, AI-ready, cloud-native DMS

The decision to implement a new system was not one that BTO made lightly. "We wouldn't have considered adopting anything other than the market leader," says Fisher. "iManage is used by the top legal firms in the UK."

The firm and its internal stakeholders reviewed the [iManage Cloud](#) platform. They decided it was the best fit for their document management needs today and to help BTO achieve its ambitions going forward.

"It's important to have everything in one place so we can get an accurate picture of client matters and an audit trail of every touchpoint," Fisher observes. "So we looked at how well iManage integrates with solutions like practice management, finance, billing, and timesheet systems, and also confirmed that iManage met BTO and its clients' data security requirements."

The user experience was a key consideration, as well. "We want people's time at BTO to be enjoyable, so they're in a positive mindset when they work with clients," says Walker. "With the iManage platform, we have an integrated system that promotes both efficiency and user satisfaction."

BTO migrated to iManage Cloud with support from [Quorum](#), a local iManage implementation partner. Quorum handled the firm's change management, running hour-long training sessions that were recorded and stored in BTO's knowledge base, along with links to iManage training videos. Quorum also enabled iHelp, a feature of [iManage Work](#) that helps to educate users on how to use buttons, perform tasks, and personalize their experience.

Everyone works in iManage, and they say feedback has been positive. "They're used to working in a document management system, so it was just a matter of learning where everything is in the iManage Cloud," says Walker. "We've even had some new recruits join BTO from other firms who are already familiar with iManage."

The seamless integration between iManage Work and [Microsoft 365](#) enables staff to interact with iManage directly from Outlook and Word without skipping a beat, reducing the distraction of context switching and saving everyone a lot of time.



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Alan Fisher
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I'm testing iManage Mobility app, and it's great. I can do things without being at my computer and bring up documents as I'm walking around the office helping people.

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Powerful search functionality in iManage enables them to bring up the right document or email in seconds, whether they choose to look within a specific matter or across all available locations. For third-party solicitors or accountants, lawyers use [iManage Drive](#) to export matters and [iManage Share](#) to send documents securely.

“iManage Share gives us visibility of everything we're sharing across the firm. If there are any issues with access, we can see that too and sort it out quickly,” Walker adds.

The business outcomes

A sustainable investment in present and future success

BTO has a user-friendly document management platform in iManage, which is great for new starters and long-serving staff alike. It's easy to find the right documents, save files in the relevant folder, and enforce data governance across the firm. There's also a clear audit trail of all communications in a secure environment.

“iManage doesn't just benefit our existing workforce, it's a sustainable investment in our future success,” says Walker. “Showing candidates that we have the leading productivity platform makes us a more attractive place to work.”

After a month on iManage, BTO is quickly putting its plans into action. Initially, it's setting up AI-powered email filing, which will digest emails and suggest appropriate places to save them based on content. Expecting usage to ramp up quickly, the team attends local iManage events, to get more guidance and uncover new ideas for using the platform.

“iManage is proactive and interested in what its customers have to say, and that's part of what makes it such a good partner for law firms. It's hugely comforting to attend customer events like the iManage Cloud and AI Update in Edinburgh and be in a room full of other firms sharing the wins they've had with iManage,” says Fisher.

Looking ahead

BTO is preparing to go live with [iManage Threat Manager](#), which will enhance its security posture. The firm is also looking at [iManage Mobility](#) for its Apple devices. “I'm testing the Mobility app, and it's great. I can do things without being at my computer and bring up documents as I'm walking around the office helping people,” Fisher comments. “This will be particularly useful for litigators who can't leave the courtroom to consult a document.”

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 30 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.