

A. O. Smith legal team works and collaborates with ease and efficiency

Global manufacturer supports its internal legal professionals with iManage Work 10 in the Cloud



Industry:

- Corporate: Manufacturing

Headquarters:

- Milwaukee, Wisconsin

iManage footprint:

- iManage Work 10 in the Cloud



About Hennessy Solutions & Services Group:

HSSG excels in DMS, integrations, migrations, maintenance, and workflows. Our 20 years of experience and partnerships enhance our custom solutions, consistently exceeding client needs and ensuring future success.

A. O. Smith is a global manufacturer of residential and commercial water heaters and boilers. Its internal legal team used network share and VPNs to access documents, but they had no standard document management process or system, and this made for decreased efficiency. To resolve this, the company rolled out iManage in 2010 and continuously upgraded the solution over the next 14 years to support the team's changing needs and requirements. The company migrated its legal team to iManage Work 10 in the Cloud in 2019 and boasts 99 percent user adoption. The legal team is more productive and efficient on the iManage Cloud platform, where they can access documents securely from anywhere and collaborate easily with internal and external counsel.

Founded in Milwaukee, Wisconsin in 1874, A. O. Smith is a leading manufacturer of residential and commercial water heaters and boilers. The company operates across North America, China, India, the UK, and the Netherlands. It employs 12,000 people and has annual revenues of \$3.8 billion. The A. O. Smith legal team has been using the iManage platform for about 14 years.



iManage has grown with our business, and I'm proud that we've been through multiple transitions with no disruption to users.

Joyce Stoner
Senior Legal Specialist, A.O. Smith



Business outcomes:

- Robust document management
- More efficient and collaborative
- Powerful search
- Scales with the business

The business challenge

Network share and VPNs were slow and inefficient

About 20 people comprise A. O. Smith's internal legal team. Each lawyer is responsible for a different area of the law, including mergers and acquisitions, employment and labor law, environmental law, contract reviews, and compliance management. The team also includes litigators and works with partners for outside counsel.

When the company set up its legal team, the staff relied on a network share for all documents, which made it difficult to find and organize files. Individuals created folders independently rather than following a standard convention. When lawyers collaborated on a matter and saved documents on the network, duplication and version control became an issue. The team also scanned paper files and spent considerable time manually renaming documents.

When attorneys traveled for work, they accessed documents via a VPN. But this approach was slow, unreliable, and didn't protect devices from malware, viruses, or cyberthreats, which created a risk for a potential data breach or outage.

"We needed a document management platform that kept files related to specific matters together and one that we could access from anywhere," explains Joyce Stoner, senior legal specialist at A. O. Smith.

The solution

An adaptable knowledge work platform

After evaluating Worldox, OnBase, and iManage, A. O. Smith chose iManage knowing it had the right features and functionality to meet its needs. Stoner had worked extensively with iManage in previous roles, so she became the in-house iManage champion.

"OnBase was more of a repository for completed documents. It didn't have a lot of version control tools and couldn't store emails," recalls Stoner. "We wanted a solution that allowed us to create a workspace for each matter and store everything relating to it in one place."

The company partnered with Hennessy Solutions & Services Group to implement iManage Work 10 in the Cloud, simplifying anywhere access while maintaining a secure, fully managed solution.

To streamline user adoption, Stoner ran "lunch and learns," one-to-one sessions, and developed quick-training guides. Now, due to the intuitive nature of the system, new users can hit the ground running and be more productive.



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“Everyone got on board pretty quickly. Our general counsel loves the fact that iManage is a modern document management platform that’s simple to use. His assistant can even file his emails for him,” says Stoner.

Popular features include templates corresponding to different areas of the law that enable staff to quickly set up a workspace for each matter. This has reduced the number of master folders from unlimited to eight and makes locating documents effortless. Staff also like that they can rename emails when they file them by simply clicking a button. They can even share document links in emails so the recipient can go right to the file. When they need to find something, iManage search is fast and powerful.

The business outcomes

Boosting productivity with 99% user adoption on the legal team

The iManage implementation has made A. O. Smith’s legal team more efficient. They can collaborate easily, knowing they’re all working on the latest version of the document, and they can find what they need in seconds. It’s no surprise that the company has a 99 percent user adoption rate.

“iManage Work 10 in the Cloud has really improved our workflow. It’s robust, connects to our matter management system easily, and makes document management a breeze,” explains Stoner. “I have the iManage Work panel open on my monitor all day.”

Hennessy Solutions & Services Group facilitated the transition to the auto-update iManage end user clients, maintained the integration with A. O. Smith’s cloud-based matter management system, and automated processes using iManage REST API scripts. They have also provided support for iManage users and admins at A. O. Smith.

“iManage has grown with our business, and I’m proud that we’ve been through multiple transitions with no disruption to users,” says Stoner. “It gives us more time to focus on the most valuable tasks.”





Looking ahead

A. O. Smith's iManage implementation continues to evolve and the legal department is committed to staying up to date. New features and add-ons will be evaluated and implemented based on the company's needs.

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.