

M&A firm puts governance and AI-readiness to work for clients

Finn Dixon & Herling moves to iManage Cloud for its system stability, performance, governance, and stress-free deal closings



FINN DIXON & HERLING

Industry:

- Legal

Headquarters:

- Stamford, Connecticut, US

iManage footprint:

- iManage Work in the Cloud
- iManage Share
- iManage Threat Manager
- iManage Closing Folders
- iManage MCP Server

Finn Dixon & Herling, a Stamford-based M&A boutique firm, moved to iManage when the practice outgrew its legacy document management system (DMS), ten years ago. Since then, the cloud-native platform has never disappointed, always scaling to meet the firm's expanding business needs by introducing features like browser-based Microsoft 365 integration — which helped the firm escape significant investment in new infrastructure. Now they have iManage MCP Server, which permits them to connect popular and useful third-party AI tools with the content stored in iManage. Meanwhile, iManage thought leaders try to help firms learn how they can keep those third-party AI tools from compromising their content.



iManage Threat Manager gives us visibility into activity that falls outside a user's normal behavior. That helps us identify potentially compromised accounts, protect client information, and meet the audit and compliance requirements our clients expect.



Nigel Johnson, Technology Director. Finn Dixon & Herling

Partner:

Younts is a nationally recognized premier content management company serving law firms, corporate legal, and government entities. Its experienced consultants, project managers, developers, and certified engineers have delivered exceptional results and built long-term client relationships for over 25 years.

Business outcomes:

- Governed AI integration
- Search built for scale
- Effortless deal closings
- Insider threat visibility



iManage Closing Folders reduces manual coordination and provides a more efficient, controlled way to manage signature pages and document versions throughout the closing process.

Nigel Johnson,
Technology Director,
Finn Dixon & Herling

The business challenge

Steady M&A growth outpaces tool capabilities

Finn Dixon & Herling's growth is a success by any measure. Its M&A practice has expanded steadily, and matters have multiplied along with document volumes. They had started with a document management product that was later acquired by another vendor, but it was not built to evolve with the practice. A single matter folder for some of the firm's clients contained between 15,000 and 20,000 documents; retrieval at that scale required workarounds that added time to every task. Search became a bottleneck, and the tool's most reliable navigation method was institutional memory.

"The issue was not how the documents were organized; it was the limitation of the search indexer," says Nigel Johnson, Technology Director at Finn Dixon & Herling. "Newer users could be challenged in finding documents." Manual email filing posed a parallel challenge. When an associate moved on, the records team archived their email with due diligence to ensure nothing important was left unfiled.

Collecting and organizing signature pages was traditionally a manual process that could extend over several days or weeks and required careful coordination while transaction documents continued to evolve. "Signature collection was a highly manual process and could slow down the final stages of a closing," says Johnson.

Growing pains are a good problem to have, but also one that the firm knew it could solve. They simply needed a knowledge platform that was built to scale as the practice expanded.

The solution

Choose the right foundation for growth

Johnson assembled a group of younger associates and recent laterals who could assess prospective solutions and provide a fresh perspective. Both iManage and the closest competitor were cloud-based, which was important: the firm was hosting multiple platforms in its data center and was eager to shed that burden. Both platforms made the shortlist, but a newly elected partner who had come from a firm that had adopted the competitor was not a fan.

"We didn't want to recommend something that one partner was already against, especially if they're going to be one of the decision makers." Those reservations were reinforced when they learned that the iManage client roster at the top of the market was long and stable. "If all these big law firms had been using iManage for years and its nearest competitor offered a better platform, they would have switched to it," Johnson reasoned. The strength of the iManage reputation, decades of experience, and evidence of continued customer loyalty over time convinced the team to go with iManage.

Drive process improvements and mitigate risk

Finn Dixon & Herling worked with implementation partner [Younts Consulting](#) to simplify the firm's infrastructure so that it maps to how attorneys think about their work. Training was focused, and the cutover was smooth.



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Nigel Johnson,
Technology Director,
Finn Dixon & Herling

Following migration, the firm drove process improvements by adopting components of the iManage portfolio, starting with taking the stress out of deal closings, which was a pain point, by implementing [iManage Closing Folders](#). "Closing Folders reduces manual coordination and provides a more efficient, controlled way to manage signature pages and document versions throughout the closing process," says Johnson.

As an added benefit for deals, the team sets up client-facing deal rooms using [iManage Share](#). This enables counterparties to upload documents directly and keep everything inside the governed environment from the start. The firm also relies on Share, rather than email, to send large documents securely, because most clients do not accept attachments over 10 MB. These efficiencies quickly became part of the day-to-day M&A workflow.

Johnson mentioned that moving to the new Outlook was a priority for the firm because its modern add-in architecture avoids many of the stability issues associated with legacy Outlook plug-ins. A key part of that transition was the new iManage integration for Outlook, which enables users to attach documents from iManage and file emails directly into the appropriate workspace. Now, when associates leave the firm, bulk filing uses accumulated filing intelligence to rate and place years of email where it belongs in one step, with no manual intervention from the records team.

[iManage Threat Manager](#) helps the firm protect its large document repository by identifying unusual access, download, and sharing activity. Its anomaly reports allow the IT team to review flagged events and quickly determine whether activity reflects a legitimate business need or a potential security incident. "Threat Manager gives us visibility into activity that falls outside a user's normal behavior," says Johnson. "That helps us identify potentially compromised accounts, protect client information, and meet the audit and compliance requirements our clients expect."

The business outcomes

A trusted foundation that keeps delivering for a growing firm

Many concrete positive outcomes resulted from the firm's adoption of the iManage platform, including better organization, improved performance, reduced stress during deal closings, greater system stability, and reduced risk. But Johnson also cites a compelling example of financial benefit.

Finn Dixon & Herling operates a large Virtual Desktop Infrastructure (VDI) environment, and attorneys working on lengthy credit agreements with track changes had been pushing against GPU capacity limits.

"We were looking at investing hundreds of thousands of dollars to get new GPUs for the data center," shares Johnson. "Then I realized that browser content redirection, which offloads rendering to the local GPU through the browser-based [iManage with Microsoft 365](#), was on the roadmap and due to come out pretty soon." He says the calculus shifted immediately. "Now the attorneys can just use the browser version of iManage on 365, and we don't have to spend this money."



It doesn't matter how good your search engine is if your data is not classified correctly. Once you have better control of your underlying data, you're going to get better results. That's why iManage AI Enrichment will be a game changer going forward.

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Technology Director,
Finn Dixon & Herling

Moving to iManage has also changed the AI equation. Finn Dixon & Herling can now request that AI vendors access their content via [iManage MCP Server](#) rather than bulk-exporting documents. All AI interactions via iManage MCP Server are authenticated, permission-bound, and logged.

"The way we've set it up, anything that changes while someone is using an approved external AI tool goes back to that same document. It's the most up-to-date information, but it's maintaining the information governance that we're used to."

Every attorney at Finn Dixon & Herling uses iManage — 100 percent adoption — and the platform's performance has held steady as document volumes have grown well beyond what the firm's original DMS would have supported. Johnson has every confidence in the firm's decision to make the iManage platform the firm's foundation for growth.

Looking ahead

Finn Dixon & Herling is evaluating [iManage Insight+](#) as the next step in elevating its knowledge maturity, primarily for the benefit of the M&A practice. While large language models make search more natural, the firm wants a verified precedent library: a curated repository of approved clauses and standard forms that AI tools can search against with confidence that the results have already been vetted.

"We need a place to store this curated data so that we're not performing the same searches across the team," remarks Johnson. "When we have all of our precedents stored in the same central repository, we know only verified clauses are being pulled."

Johnson sees [iManage AI Enrichment](#), which automatically classifies documents by type, extracts key information points, and saves the information with the document, as the other active priority. Johnson says enrichment builds the layer that makes search results meaningfully more reliable, not just through better OCR but through underlying AI that understands the intent behind a query.

"It doesn't matter how good your search engine is if your data is not classified correctly," he warns. "Once you have better control of your underlying data, you're going to get better results. That will be a game changer going forward."

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.