



# Is your DMS ready for the way legal work is changing?

## A self-assessment for legal technology decision makers

A document management solution is no longer just where legal work is stored - it's where legal work happens. As client expectations rise, matters grow more complex, and AI becomes embedded in daily workflows, you need a platform that can be the operational backbone for the modern legal organization. This checklist is designed to help you assess whether your current approach is truly enabling modern legal work – or quietly constraining it.

Work through each statement below and check the box if it's true for your current platform. The more boxes you leave unchecked, the more your current solution may be holding your firm or legal team back.

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## AI and Search

- When an attorney asks a complex question across multiple matters, our document management system (DMS) returns a synthesized, cited answer – not a list of documents to manually read through
- Advanced AI features like multi-document timelines and citation verification are included in our platform – not locked behind a paid upgrade or separate app
- Our team doesn't need prompt expertise to get value from AI – guided actions surface the right capabilities automatically
- Our AI usage is not limited by token caps or usage allotments – attorneys query freely without worrying about cost
- Our AI can reason across our entire document library – not just one document at a time

5 checks possible · How many did you check?

## Governance and Security

- When our AI processes a document – summarizing, extracting, or analyzing – that content never leaves our governed environment
- We have ethical walls, insider threat detection, and full audit trails at the document level – not just the application level
- Our platform monitors anomalous behavior 24/7 across the entire repository – not just individual matters we manually flag
- All data processing – OCR, AI, indexing, preview – happens within our geographic region with no cross-cloud routing
- Security patches and updates are deployed automatically with zero downtime, including in response to zero-day threats

5 checks possible · How many did you check?



## Reliability and Infrastructure

- Our platform has not experienced an outage that interrupted an active matter in the past 12 months
- There are no scheduled maintenance windows that take our system offline
- Our platform is stable and proven – it is not midway through a major cloud migration
- Attorneys can continue working on recent documents even when connectivity is lost
- When our platform has had issues, we heard about it from our vendor first – not from our own users

5 checks possible · How many did you check?

## Scale and Document Management

- Our solution indexes and makes searchable up to 20 versions of every document – not just the most recent or 'official' version
- Attorneys never have to manually mark a document as 'official' to ensure it is preserved and searchable
- We have never had to restructure how we organize a matter because of folder or file size limits
- Large file uploads retain full functionality – including OCR, DLP tagging, and compliance tools
- AI enrichment runs automatically across our entire repository – attorneys don't have to trigger it for each document

5 checks possible · How many did you check?

## Collaboration and Microsoft

- Attorneys can co-author documents simultaneously across all devices with full version control and a complete audit trail
- Documents can be shared securely with external stakeholders directly from Outlook – without switching applications
- External collaboration does not require moving documents into special shared folders or spaces
- Our solution integrates natively with Microsoft 365, including access to Azure OpenAI capabilities
- AI tools can access our content without that content leaving our governed environment

5 checks possible · How many did you check?

## Your Results

Add up your checked boxes across all five sections.

Total checked:

### 20–25 checked

Strong Foundation: Your platform is performing well across most dimensions. The question is whether it's positioned for where legal AI is heading next – agentic reasoning, MCP-powered ecosystem connectivity, and governance that scales with your ambitions.

### 13–19 checked

Gaps Emerging: You have a solid baseline, but gaps are creating friction and risk for your team. These tend to widen as AI expectations grow and matters become more complex. The areas you left unchecked are worth a closer look.

### 7–12 checked

Significant Risk: Your platform has meaningful gaps across multiple areas. These aren't just workflow frustrations – they likely represent real compliance risk, productivity loss, and barriers to AI adoption across your firm.

### 0–6 checked

Critical Gaps Identified: Your responses point to fundamental limitations in your current platform. These gaps compound over time. It may be time for a candid conversation about what a modern platform actually looks like.

**Every checked box above describes a capability that is standard in iManage. Not an add-on. Not an upgrade. Built-in.**

- Ask iManage reasons across your entire library and returns cited, actionable answers in seconds – without content ever leaving your governed environment
- iManage Threat Manager monitors anomalous behavior 24/7 across your entire repository using AI – not just matter-by-matter lockdowns
- 99.9% uptime on a proven Azure-native architecture – no maintenance windows, no mid-migration risk
- Up to 20 document versions indexed and fully searchable – including complete change history for e-discovery and audits
- Native co-authoring across all devices – full version control, full audit trail, no document lockout

## Ready to see the difference?

Don't let a reliability crisis and stagnant innovation stall your team's progress. Learn why hundreds of law firms and legal departments are transitioning to iManage.

**[See the iManage difference](#)**

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**About iManage™** Dedicated to Making Knowledge Work™, iManage cloud-native platform enables organizations to work more productively, collaboratively, and securely. Employing award-winning AI-enabled technology, an extensive partner ecosystem, and a customer-centric approach, iManage provides support and guidance you can trust to help you leverage knowledge to drive better business outcomes. Visit [www.imanage.com](http://www.imanage.com) to learn more.