

Governance is a powerful differentiator at Chaffetz Lindsey

Firm serves exacting clients with zero data loss for 18 years, moves 2.5 M documents seamlessly to iManage Cloud



CHAFFETZ LINDSEY

Industry:

- Legal

Headquarters:

- New York, US

iManage footprint:

- iManage Work 10 in the Cloud
- iManage Security Policy Manager
- iManage Threat Manager
- Ask iManage
- iManage MCP Server

Chaffetz Lindsey, a boutique litigation firm in New York, broke off from a major international firm shortly after the 2008–2009 financial crisis. The firm's Director of Information & Information Security brought nearly two decades of iManage experience and a clear sense of what a knowledge work platform needed to do for a firm serving sovereign nations, global financial institutions, and complex international arbitration. After returning to the iManage platform following a three-month detour with a competing solution, Chaffetz Lindsey built an uncompromising matter-centric culture. The firm's governance infrastructure has delivered zero data loss over 18 years, facilitated the migration of 2.5 million documents to the iManage Cloud, and now supports a full suite of artificial intelligence (AI) tools, firm wide. The calculus for the growing firm is not whether iManage is the right foundation — it is what to build on it next.



I manage the ethical walls in iManage Security Policy Manager with very little effort. That's a godsend.

Douglas Gibson, Director of Information & Information Security, Chaffetz Lindsey



Business outcomes:

- High-visibility platform
- Governance architecture scales automatically
- Markedly lower support ticket volume
- MCP bridging for AI tools



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Douglas Gibson, Director of Information & Information Security, Chaffetz Lindsey

The business challenge

Work couldn't slow, ethical screens couldn't fail, infrastructure had to keep up

Chaffetz Lindsey was built for sophisticated, demanding work — sovereign countries, major financial institutions, hedge funds, and high-net-worth individuals. Productivity and precision are non-negotiable.

Having started out with iManage, the firm tried a competing document management platform early on, quickly regretted it, and switched back to iManage within three months. “We couldn't take the user interface of the competitive product,” says Douglas Gibson, Director of Information & Information Security, Chaffetz Lindsey. “And there were certain standards of iManage — the expectations of what the search results would be, for example. No pricing advantage could compensate for a tool that slowed the work down.”

Chaffetz Lindsey opened with a clean slate. No legacy data, no inherited habits, and with Gibson as the firm's sole administrator at founding. He used that edge to build something most firms spend years trying to retrofit.

But as the firm grew more than fivefold over the following decade, a challenge emerged that required ethical walls. The complexity of Chaffetz Lindsey's arbitration practice meant partners appointed as arbitrators had to operate in complete informational isolation — every related matter fully invisible to every other attorney in the firm. Gibson eventually found that more than 35 percent of all matters carried ethical screens, a figure he describes as “extremely high” by industry standards. Managing that manually was not only unsustainable, it was a liability.

Legacy on-premises infrastructure added further pressure. Gibson's team was fielding up to 400 support tickets per month — an enormous operational burden for a 75-person firm. This ultimately made the case for migration to [iManage Work 10 in the Cloud](#).

The solution

Cloud-first, matter-centric, and governed for AI from the ground up

Chaffetz Lindsey worked with [Harbor Global](#) as its migration partner, moving 2.5 million documents to the cloud with no errors or issues. And what the migration unlocked — complete visibility into the platform — mattered as much as the migration itself. “I instituted matter-centricity, and there were no deviations from that,” Gibson says.

[iManage Security Policy Manager](#) resolved the ethical walls challenge and created something more valuable: a governance architecture that scales automatically. New matters added to a screened client inherit the parent's security rights without manual intervention. The arbitration panel model — in which a partner must be completely separated from all colleagues on relevant matters — now runs as routine rather than an emergency procedure.



The firm's non-timekeeping personnel could operate and find clauses in precedents as fast as the attorneys because Ask iManage was the tool they were most exposed to. They became its AI champions.

Douglas Gibson, Director of Information & Information Security, Chaffetz Lindsey

"I manage it now with very, very little effort. That's a godsend. And [Security Policy Manager](#) is that much more efficient in the cloud than it is in the on-prem environment," Gibson explains, "both financially and operationally."

The culture became self-reinforcing. "A summer associate who chose not to file a memo returned a year later and asked for it back. The document no longer existed. He learned the hard way that you do have to file it to get it back for recall," says Gibson. That intern became one of the firm's best filers. The firm's timekeepers and staff are believers, as well, with 100 percent adoption of the iManage platform. "No Chaffetz Lindsey content is shoved into OneDrive, and there are no shadow repositories," he confirms.

Fortuitously, starting clean with iManage and establishing a governance layer that protected clients for nearly two decades also turned out to be the prerequisite for AI. The firm deployed [Ask iManage](#), an AI assistant that operates within the iManage platform, within a two-month window, and did not need to stage the rollout or segment it by practice group.

Ask iManage transformed how the firm finds and uses knowledge. Search is more than half of what people do in the platform, and Ask iManage made that faster and more precise than ever — letting attorneys and staff find specific clauses in signed engagement letters, compare how similar matters were handled, and get a new team member up to speed on an active trial in days rather than weeks. Without it, that same team member might be reading thousands of documents — and causing alerts about anomalous user activity from [iManage Threat Manager](#) to stack up on Gibson's desktop as they worked through the pile.

The real-time visibility into document access and download activity that Threat Manager provides is the iManage capability Gibson relies on most heavily when attorneys exit the firm. It ensures that risky patterns surface before they become problems and reinforces the governance discipline that underpins the firm's client audit responses.

The business outcomes

Hundreds of tickets to a handful — from a liability to a client credential

The most immediate measure of the cloud migration's success was the support ticket figure. By moving its knowledge work into the cloud, Chaffetz Lindsey's IT support dropped from hundreds of monthly tickets to a handful, freeing Gibson to focus on advancing the practice rather than maintaining its knowledge infrastructure.

Solid governance is non-negotiable. Chaffetz Lindsey fields multiple client technology audits every month from some of the world's most demanding clients. The data of sovereign governments and major financial institutions carries the highest standard of care. And Gibson can answer every one of those audits with the same response: the firm has not had a data loss in 18 years. "I'm the data governance guy who has to be the policeman of the firm," he says. "And I can confirm that we have not had a data loss."



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Douglas Gibson, Director of Information & Information Security, Chaffetz Lindsey

With our data on premises, that had been a concern, and now, with our data in the [iManage Cloud](#) with iManage protections, it's no longer a concern. It's something that we rely on."

Gibson says the tight security foundation makes everything possible, especially the use of AI. "The firm's non-timekeeping personnel could operate and find clauses in precedents as fast as the attorneys because Ask iManage was the tool they were most exposed to. They became its AI champions."

"If a firm similar in size and revenue to Chaffetz Lindsey is unwilling to invest in a knowledge management platform like iManage," Gibson speculates, "they're not saving any money. Their staff spends half the day looking for documents and sometimes never finds them."

Looking ahead

Chaffetz Lindsey's next chapter is grounded in the same principle that has governed every technology decision: data should stay in iManage, and tools should reach in rather than pulling content out. The firm is building a data lake combining time and billing information, financial forecasting data, and knowledge work content — the first integration of financial and matter intelligence at scale.

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Gibson embraces the next-generation [iManage platform](#), with its tray-based interface, drag-and-drop document search, and voice input capabilities. "The recently announced iManage roadmap is the biggest leap forward in a 12-month window that we've seen from any other company," he remarks. And Chaffetz Lindsey is there for it.

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.