iManage
Making knowledge work

COLE, SCOTT & KISSANE PUTS EMPLOYEES AT THE HEART OF INNOVATION

Florida's largest law firm transforms the employee experience with iManage knowledge work platform

CSK Cole, Scott & Kissane
The Florida Law Firm

Industry:

- Legal

Headquarters:

- Miami, US

iManage footprint:

- iManage Work 10 in the Cloud
- iManage Threat Manager
- iManage Security Policy Manager

When company growth outpaced the capabilities of their on-premises document management solution, top rated law firm Cole, Scott & Kissane (CSK) pulled out all the stops to give employees the best possible document management experience. CSK attorneys navigate through matters faster and work smarter than ever using iManage Work 10 in the Cloud. And, with the addition of iManage Security Policy Manager and iManage Threat Manager, the firm significantly upgraded its security and threat detection — with far greater control over visibility of the matter. Moving to the iManage platform also supports CSK's ability to scale its services as the firm continues its growth trajectory.

Cole, Scott & Kissane is Florida's leading defense firm. It specializes in insurance defense litigation and employs more than 1,350 people across 13 offices. The firm is highly rated both nationally and regionally by US News' Best Law Firms, with 18 attorneys on its Best Lawyers list. It's also part of the AmLaw 200, which is a list of the top 200 law firms in America by gross revenue.

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Jason Thomas, CIO, Cole, Scott & Kissane

The challenge

Taking the complexity out of document management

CSK prides itself on providing fast, cost-effective services to clients, closing 6,095 files during 2021 and 2022, with an average lifecycle of just 100 days. The firm wanted to give its attorneys the best possible experience navigating through folders to find relevant data for matters.

"Attorneys need fast access to relevant files from anywhere, but that shouldn't come at the expense of the user experience," explained Jason Thomas, CIO at Cole, Scott & Kissane. "It's our job to take the complexity out of document management while keeping the data secure."

The firm launched a case and document management strategy in 2015, but with its exponential growth rate, the IT team quickly realized it needed to pivot to a more robust approach they could scale to meet future requirements.

The solution

Secure document management in the cloud

CSK evaluated the other solutions on the market before deciding to implement iManage Work 10 in the Cloud.

"With iManage," said Thomas, "we don't have to worry about securing and maintaining multiple servers to protect 90 terabytes of business-critical data. We can assure clients their data is well-protected in the cloud by the most reliable document management solution out there, and that the only people who can see their matter are the team members who are working on it."

The team also enabled single sign-on via an integration with Okta to standardize security practices in and outside of the office. Attorneys can only access data from firm-issued computers or via the mobile app, reducing the chance of files being saved on personal devices outside of the firm's control.

The simple, intuitive user interface gives attorneys the same, low-click experience on mobile devices and desktop, which helps to encourage user adoption. Meanwhile, the enhanced search function helps them to find relevant files quickly and easily.

Leveraging APIs to expand functionality

The team also developed custom add-ons via iManage APIs to optimize the solution in line with strict industry standards. These include plug-ins for Microsoft Outlook that prompt a user to select which matter the email relates to, then auto-fill the subject line and contacts to be copied and format the email to match client requirements.

"Remembering style rules for every client takes a lot of effort. By outsourcing the thinking to our backend database and integrating it with iManage, attorneys can focus on the high-value tasks that matter most," remarked Thomas.

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CIO, Cole, Scott & Kissane

CSK also created a workflow called iManage "Drop" to speed up saving attachments. This enhances the platform's drag and drop functionality with rules that follow the firm's in-house file-naming conventions.

When someone receives multiple documents, they can create PDFs, organize them, and create a binder or individual files. This not only saves time, it also helps with version control. "iManage gives us the best functionality on the market and the flexibility to make it our own," said Thomas.

Light-years ahead of the previous solution

CSK optimized the employee experience when they rolled out Work 10 in the Cloud, but by adding iManage Threat Manager and iManage Security Policy Manager the firm opted for highly advanced protection of their data.

iManage Threat Manager monitors threats and usage within practice groups. Thomas uses the activity reports that the software generates to assure group leaders and office managers that user adoption is high and the environment is secure, with the data to back it up. While iManage Security Policy Manager he describes as "light-years ahead" of their previous solution.

"We were using passwords to lock down matters, but there was no way to control visibility of the matter," he revealed. "With iManage Security Policy Manager we can apply permissions per matter. If someone doesn't need to work on it, they don't know it exists. It's a really powerful tool."

Business Outcomes

Empowering attorneys to work smarter from anywhere

With iManage, attorneys can navigate through matters faster and work smarter than ever. CSK launched "lunch and learn" training sessions for their users, and Thomas says that user adoption is "through the roof." The iManage mobile app helps their attorneys work efficiently from anywhere, giving clients seamless services in the office or on the road.

The firm has also improved reliability and performance by moving to the cloud, while enabling their IT department to refocus on high-value work. "We never have to worry about an IT outage with iManage, it's highly available, up-to-date, and secure," said Thomas.

Looking Ahead

Centralizing more processes on iManage

Future plans for CSK include integrating its case management system with iManage to create a powerful, single source of truth and help staff to work even more efficiently. The team is also excited to integrate Microsoft Teams, which will simplify communication.

Using custom workflows in iManage, the firm is developing a review system to track the progress of documents as they are assigned, reviewed, and returned by the relevant stakeholders. They also plan to implement iManage Share to simplify collaboration with clients.

As CSK continues to scale, iManage Work 10 in the Cloud will be there to support the firm's long-term strategies while enabling attorneys and staff to focus on what they do best — provide insurance companies with the best defense litigation in Florida.

About iManage™

iManage is the company dedicated to Making Knowledge Work™ Its intelligent, cloud-enabled, secure knowledge work platform enables organizations to uncover and activate the knowledge that exists inside their business content and communications. Advanced Artificial Intelligence and powerful document and email management create connections across data, systems, and people while leveraging the context of organizational content to fuel deep insights, informed business decisions, and collaboration. Underpinned by best of breed security, sophisticated workflows and governance approaches, iManage has earned its place as the industry standard through continually innovating to solve the most complex professional challenges and enabling better business outcomes for over one million professionals across 65+ countries. Visit www.imanage.com to learn more.

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