iManage
Making knowledge work

Premiere Canada litigation firm centralizes data and streamlines workflow for four offices

Filion Wakely Thorup Angeletti delivers the best value to staff and clients with iManage Work 10

FilionWakely Thorup Angeletti LLP
management labour and employment law

Industry:

- Legal

Headquarters:

- Toronto, Ontario, Canada

iManage footprint:

- iManage Work 10
- IManage Share
- iManage Security Policy Manager
- iManage Threat Manager

Filion Wakely Thorup Angeletti LLP (Filion) is one of Canada's largest and highest-ranking law firms practicing exclusively management-side labour and employment law. Expert litigators, the team is known for being formidable advocates, respected by opposing counsel and unions alike. The firm's proactive orientation motivates them to partner with clients to develop and maintain sound labour relations and employment policies and practices.

Filion introduced the firm to the invaluable advantages of a centralized document repository by implementing iManage Work 10. An iManage customer for five years, Filion appreciates that their DMS can scale with the business no matter how large it grows.

> " iManage Work 10 gave us the fit and function we needed at a price point we could justify. It offered the best value proposition for the firm.

David Ip
Technical Support Manager, Filion Wakely Thorup Angeletti

Business outcomes:

- Simple, intuitive interface
- Find documents and emails easily
- Work is more streamlined
- Improved collaboration
- Training is minimal

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The business challenge

Finding and sharing documents

Filion has multiple offices, and each site had its own way of doing things, including how each office managed its documents. In addition, each lawyer had their own preferred way of filing things, with the overall effect of there being little consistency across the firm in how things were organized.

Sharing documents across offices became a challenge. Finding documents — even in the same office if the lawyer who filed the documents followed a different filing protocol than the individual who needed to find them — could also be a challenge.

Filion's answer to eliminating filing inconsistencies and streamlining the workflow through the firm, as well as making searches faster, easier, and more productive, was to centralize the firm's documents on a single, matter- and client-based document management system.

The solution

Identifying the best value

"I want to have a bit of vision and see if, down the road, a product is going to grow with us. One of the reasons we went with iManage is that we knew it would continue to be the right solution for us regardless of our size," says Ip.

The firm looked at several options of various sizes, costs, capacities, and what they would do for Filion. It was a bit of a Goldilocks scenario. Ip said the bigger one, OpenText, may have served their needs, but it was too expensive. He said the smaller one had a different kind of drawback.

"Worldox had far lower costs, but the interface looked decades out of date, and optics are important in law. I worried that you get what you pay for," Ip recalls, "and also that our firm's reputation could suffer if other lawyers saw us using an outdated-looking DMS."

Ip also envisioned firm leadership seeing the interface and reacting with alarm after paying a significant amount of money to implement a system that was visually out of step.

"iManage Work 10 gave us the fit and function we needed at a price point we could justify," says Ip. "It offered the best value proposition for the firm."

The ROI is quickly realized

Filion started its move to iManage Work 10 in early 2019, migrating about 20 years of old Windows file shares, and was scheduled to go live in August 2019, but for various reasons it was delayed to February 2020. Ip said the team held their pre-training for a February 2020 go-live, and everyone was ready to go.

On the day they cut off all the old file shares and told everybody they should be using iManage, there was a little bit of a learning curve, but it was great overall.

Then the pandemic hit and everyone at Filion suddenly had to work from home for their own protection. Ip says that could have been a serious setback for the firm; that keeping things organized while people were working remotely very likely would have been a nightmare.

Fortunately, that worrying scenario never happened because, by that time, the firm had already migrated its data and transitioned over to iManage.

The business outcomes

Preparing the team for change

Because the environment was so different from what they had used before, Ip's team did a lot of pre-training. Ip felt that their many long-tenured employees would benefit from the preparation. He says the newer hires were a different breed — but they all have one thing in common — they like the new system.

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With iManage Work, files are organized by matter and client, enabling people to file things where they should be so everything is consistent. Because of that, everyone can quickly and easily find the documents and emails they're looking for.

Ip says Work 10 makes it easier for everybody who needs to work on the file. In iManage people can see at one glance all the information they should have access to. Ip also mentions that the firm didn't have versioning capability before iManage. Now they can view all the different iterations of a document and quickly see the timeline of changes and who made them. That has improved their collaboration.

Training is minimal compared to the firm's past onboarding structure, Ip says, because Work 10 is largely web-based and uses components people are familiar with. The interface is simple, intuitive, and friendly to look at.

"Onboarding is good. People aren't concerned they'll delete something or blow up the system, so they can just go ahead and get their work done," says Ip.

Our security is our clients' security

"Security is number one. I tell our CEO that I could spend all day just monitoring cybersecurity. But with iManage Threat Manager I don't have to. I can see at a glance who's doing what. And the C-suite cares about that."

Ip says if he sets an alert in the system and it comes up red, he can dive in and see what's happening, which has proven very helpful.

"Without the information we get from Threat Manager," says Ip, "we might discover a potential security issue too late to act on it. That's important because our security is our clients' security, and if they lose confidence in us, we won't have them."

Because Filion has Threat Manager and iManage Security Policy Manager, Ip can easily see the firm's adoption rates, as well. He says that — except for a few older attorneys — adoption numbers are where they should be.

Looking ahead

AI and the future of work

Ip talks about how Filion uses iManage AI in the form of its search capabilities. iManage acquired RAVN, an advanced AI platform, in 2017, and quickly began integrating it into the iManage platform, as well as continuing to develop new AI business cases. So "AI" isn't new to the iManage platform or its customers; they've already been using it for years.

Ip says iManage AI (previously RAVN) is robust, scalable, and built on open-source components. It's much more powerful than previous indexer versions and gives Filion the flexibility and potential to do bigger and better things in the future.

He can foresee the new iManage AI products becoming a competitive advantage for the firm if they enable him to automate more processes. Leaving the mundane tasks to AI would enable their lawyers to concentrate on the creative business of lawyering, and that would "absolutely" be a plus.

"AI is going to change everything, probably for the better," says Ip. "I know a lot of people are concerned about it, but in the end, I think it's just something that we'll have to have if we want to remain competitive."

Integration with iManage is key

Ip says the firm is looking into adopting generative AI solutions, but they are only looking at products that integrate with iManage.

"We're not giving anyone our data, so if they don't interface with iManage it's a nonstarter for us," he asserts.

As a Microsoft shop, the partnership between iManage and Microsoft interests Ip — and the fact that iManage can integrate and talk to Copilot, which Microsoft is positioning as its new flagship, is very compelling.

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"And Teams," he adds. "We use Zoom now, but if we leverage the connectivity iManage has with Teams, along with co-authoring, Ask iManage, and Microsoft 365, all integrated and sharing information, that will help drive the transition for us."

Tapping into the firm's knowledge

"We have a lot of knowledge trapped in old precedents and documents, and, looking at iManage Insight+, if we could easily classify our data with metadata without the pain of having someone comb through each document to add it, that would be big for us," says Ip.

Have confidence in the iManage team

Ip confides that people lose confidence in a product if something is down or not working properly and they don't get the assistance they need right away, but he says that's not the case with iManage, where you get the help you need. He says the community behind iManage is a big help, too. So, for example, you can add a question to the forum without hesitation, knowing you'll probably get an answer, or at least a path you can go down to find the answer you need.

"Don't be afraid to jump in, and have confidence in the iManage team," advises Ip. "iManage Support is world-class and there's a lot of people working behind the scenes to ensure your success."

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