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Where does your organization sit now in our knowledge work maturity index?

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Who should read this and why

Many organizations struggle to harness the full potential of their business knowledge assets. Too often, organizational knowledge becomes siloed, underutilized, or worse, lost and forgotten.



Because of this, it is difficult for leaders and knowledge workers to benefit from the full, collective knowledge of the business. Remember that brilliant idea voiced in a team meeting that went undocumented and wasn't acted on? How about those amazing training resources that were never shared across the organization? What of the business goal that wasn't met because only half the company was aware and working to bring it to fruition? Or the particularly knowledgeable employee who had an answer for every question but left the company or retired without their years of experience and insights being collected and passed on?

Isolated events like these can add up and become lost opportunities for more effective collaboration, clarity, and synergy that help build a pathway from vision to reality.

Leaders and decision-makers know that there is a growing need to better action, manage, and share knowledge, but the path to a knowledge-led modern workplace is often unclear.

Some business leaders ask ...

- How can I enable employees to draw on the collective knowledge of the business to do their jobs more efficiently and effectively?
- How can we better organize and action all the knowledge in the business?
- How do businesses like mine break down knowledge silos and facilitate constructive collaboration across departments and teams?
- How do we operationalize these knowledge-centric strategies and make knowledge more central to our business and its success?

We take these challenges head-on, providing essential insights to empower your business to thrive in an era where harnessing collective knowledge has become integral to your success.

It's important for any law firm, whatever the size, to recognize that it's a knowledge-based business. We all have knowledge, and we all want to find that gold standard knowledge and make it accessible for people to reuse.

Carol Aldridge

Head of Knowledge Management and Information Systems at Burges Salmon

Technology does not magically make things better. It takes hard work, good people, and a great platform, and that is why our project has been so successful.

Colin Gin

Assistant General Counsel in the Office of the General Counsel, Asian Development Bank

What is a modern, knowledge-led workplace?

What attributes identify a knowledge work organization (KWO) as a modern, knowledge-led workplace?

At their core, modern KWOs ...

- · Are customer-centered and prioritize shared value in every interaction
- Value both historical knowledge and innovative perspectives, fostering a culture of continuous learning
- · Actively recruit for varied perspectives and experiences
- · Prioritize investments in employee satisfaction and empowerment

As we delve into the characteristics of mature KWOs, it becomes evident that these entities are not just workplaces; they are dynamic ecosystems where knowledge transfer is key.

We explore how to infuse these knowledge-centric principles into your organization with data-led tips and hints that can help you build a modern, knowledge-led business.

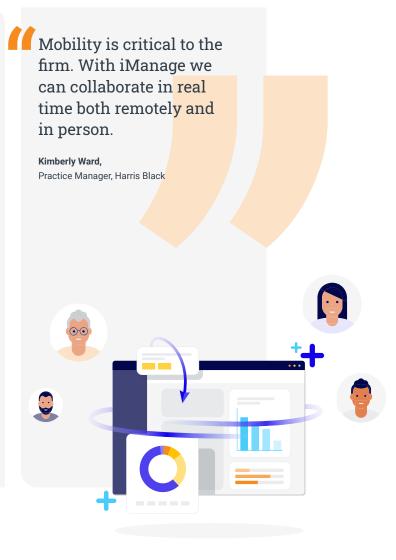
Move from a productivity mindset to a culture of collaboration

A modern, knowledge-led workplace doesn't focus simply on productivity — it fosters collaboration as a catalyst to more productive relationships across the organization. An increased focus on knowledge sharing encourages employees to participate in cross-team interactions that lead to greater work satisfaction and overall efficiency.

We wanted to work in the smartest way possible, which meant empowering all 320 employees. After initial gaps in communication, we realized that involving staff was key to driving adoption, and we nominated super users to encourage peer learning.

Jelena Bosnjak

Head of Business Development, Marketing and Communications, CMS Austria



Younger employees expect a healthy work-life balance. We adopted hybrid working and allow everyone to work remotely for two days a week. In parallel, we also wanted to explore how technology could help us improve collaboration and productivity and standardize how we work.

Heinrich Kühnert Partner at DORDA

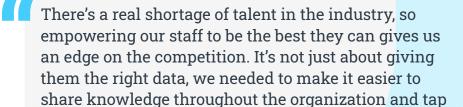
iManage gives
the team a central
place to collaborate
and store documents,
which is helpful
while working
remotely.

Maggie McVeigh

Product Owner for Legal Knowledge Management, Liberty Mutual iManage provides world-class data security. We feel comfortable that when we're collaborating on matters, our documents are secure, and only the right people can access sensitive information.

Brien Bergner

Manager, Legal Operations, Gilead



Roy Verbroekken

Partner at Bol Adviseurs

into that wealth of expertise.

This section covers collaboration advantages, barriers to good collaboration, and actionable tips, insights, and ideas for cultivating a culture that encourages collaboration.

Think of collaboration as a catalyst for enhanced productivity

Collective intelligence can only exist where collaboration and shared knowledge are prioritized.

When organizations fail to prioritize collaboration, goals for better cross-pollination and knowledge sharing are often set aside in favor of more conspicuously profitable or fee-earning activities. As a result, both the employee experience and productivity outcomes can suffer.

By giving equal support to collaboration and process improvement, a business lays the foundation for better, quicker decision-making through open access to its collective knowledge.



Invest in collaboration initiatives

You can use a variety of methods to encourage collaboration in your business, from simple, lower-cost initiatives that influence collaboration culture to higher investment options, like revisiting your technology stack.

Collaboration initiatives: ideas and best practices



Celebrate, share, and promote collaboration wins and best practices

Publicly recognize collaboration best practices in the business — in newsletters, town halls, on intranets, and more.



Encourage and incentivize crossdepartmental collaboration

Formalize skill exchange programs, crossdepartmental projects, and lunch-and-learns around specific departments or roles.



Informal cross-departmental and cross-office events

Foster friendly introductions and interactions between those in the business who don't interact daily.



Business-wide training on how to use existing collaboration tools to best advantage

Create training that encompasses best practices from across the business and tips or tricks from vendors and partners.



Build and maintain a thriving, central knowledge repository

Create policies and procedures for when, how, and why to add to it.



Embrace innovative cloud-based work environments

Facilitate real-time collaboration with collaborative tools and technologies that enhance remote communication.



Adopt collaboration innovations and knowledge management platforms

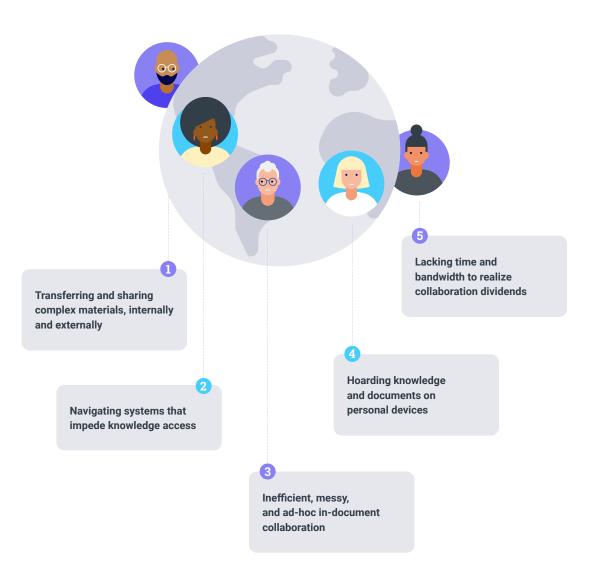
Facilitate seamless knowledge exchange across the entire business.

Remove collaboration barriers

A study of more than 30,000 global conversations between knowledge workers identified some of the most widely discussed challenges and barriers to collaboration and knowledge sharing. These barriers are frustrating for knowledge workers and can have serious implications for project and business outcomes.

Collaboration barriers and frustrations - top 5 most discussed

(From lower investment to higher investment, 2023)



Why it matters: Collaboration leads to better business outcomes

In a <u>recent analysis</u> of 11,673 digital conversations, commercial decision makers frequently discussed how even small or incremental improvements in collaboration and knowledge sharing can enable better outcomes across the entire business.

The business outcomes most often discussed alongside productivity and collaboration improvements include ...

- Financial benefits, such as decreasing costs and increasing revenues through well-actioned knowledge
- Better employee experience, leading to better retention and a more satisfied and motivated workforce
- More efficient and effective decision-making, using all the data and knowledge available
- · Greater business transparency, building trust among employees
- Creating new and innovative products or services, fueled by the collective knowledge of the business





Dutch accountancy firm <u>Bol Adviseurs</u> helps entrepreneurs bring their ambitions to life across the Netherlands. Following rapid growth, the firm's 220 employees needed fast access to secure data to help them build strong client relationships and continue winning more business.

"Our people are our biggest asset," explains Roy Verbroekken, Partner at Bol Adviseurs "Empowering our staff to be the best they can gives us an edge on the competition."

The firm decided to adopt a cloud-first strategy to outsource maintenance, updates, and security to third-party vendors. Upgrading from iManage on premises to iManage Work 10 in the Cloud provides employees with a modern workspace they can access securely from anywhere.

"It's not just about giving them the right data, we needed to make it easier to share knowledge throughout the organization and tap into that wealth of expertise," Verbroekken adds.

The firm "wowed" users with new automated workflows that help them work smarter and faster. This increases their productivity, promotes a culture of collaboration, and even helps the firm work toward sustainability goals by reducing the need for physical contracts.

"I'm really proud of what we've achieved so far," says Ruud Hofmans, Bol Adviseurs IT Manager, "and I'm excited for the next steps."



Takeaway

Business success and knowledge maturity rely on more than productivity. Executed effectively, collaboration and knowledge sharing go beyond saving time — they elevate project outcomes, enhance business success, and foster a culture of collective intelligence. Investing in collaboration together with streamlined processes supports informed decision-making — and that pays off in the short and long term for sustained organizational success.



Move from complexity to clarity

We are living through an explosion of data and the knowledge we can draw from it. Businesses can gain deep insight from the market, their customer base, vendors and partners, leadership teams, knowledge workers, other employees, and more — and this knowledge opportunity continues to grow, both in depth and in breadth.

And while it is clearly a boon for businesses and their employees, this opportunity can also bring significant complexity.

This section tackles some of the questions decision makers contemplate as they grapple with turning this complexity to clarity ...

- How do we create a central repository when different teams use different systems?
- How can we protect our centralized knowledge and IP without hindering access for our users?
- How do we capture the unique knowledge that people bring to the organization through their education, experience, and individual passions?
- What policies and procedures motivate employees to add to, maintain, and make use of the business's collective knowledge?

These questions point to the importance of a systemized approach to knowledge capture, storage, and use in a modern, knowledge-led business.

Data is the crown jewel of Gilead's business.

Brien Bergner

Manager, Legal Operations at Gilead Our workflow is based around iManage. Advanced indexing makes it easier to find and open documents, and you don't have to be in the office to be productive.

Kimberly Ward

Practice Manager, Harris Black

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

Jason Thomas CIO at Cole, Scott & Kissane We had different naming conventions between different teams, which was causing unnecessary complexity. We needed a more consistent approach to document management across the whole enterprise.

Kathleen Hogan

Senior Director, Knowledge and Data Insights at McCarthy Tétrault

The migration was complex because our data was in so many different formats and different locations and databases. BNS worked with our IT team and stakeholders from the OGC to ensure that everything was migrated correctly and was formatted for modern business users.

Colin Gin

Assistant General Counsel in the Office of the General Counsel, Asian Development Bank

The data center footprint supporting our document management platform was enormous. We were maintaining and patching servers, which was costly to run and took up a huge amount of time for the IT team. We'd also outgrown our folder creation platform.

Samit Patel

Engineering Manager at Liberty Mutual

Having one source of truth for all matters for all of our global legal teams helps us reduce risk, be more efficient and aids in compliance.

Dr. Maik Ebersoll

LL.M, Head of Legal Operations at Robert Bosch GmbH



Reduce complexity and increase clarity through better knowledge capture

- Put metadata to use and add to it
 - Often underutilized by businesses, metadata can be a powerful tool to help find, track, and triangulate knowledge. Increase metadata tagging by including it in your process whenever you create and update documents.
- Immortalize and celebrate employee expertise

 Knowledge resides in more than documents. Build a culture that
 values people as individuals and celebrates their growth, expertise,
 and the unique insights they contribute to the organization's success.
- Set clear policies, manage change, and reinforce

 Don't underestimate the WIIFM, or "What's in it for me?" factor. Across the organization, communicate the benefits of collective knowledge, make it easy to share, and keep spreading the message.



Reduce complexity and increase clarity through better knowledge storage

- Build a single source of truth in the business

 Build policies, procedures, and IT systems that enable a single repository of knowledge. Make it the "go to" for storing all new documents and knowledge.
- Balance security with access Security, while crucial, can sometimes hinder access to and use of knowledge. Take advantage of modern access management tools and cultivate access management "champions" across the business to ensure that access issues don't impede productivity and collaboration.
- Purge and audit regularly Conduct regular audits of the knowledge repository to identify outdated, irrelevant, duplicate, or contrary information.



Reduce complexity and increase clarity through better knowledge use

- Put Al and automation to good use for better discoverability
 Al can help to make knowledge easier to find with intelligent search, contextual document linking, and automatically generated document summaries saving time and reducing friction.
- Make it easier to share and collaborate with knowledge
 In-document collaboration, document check-in/check-out, being able to
 see who has made changes to a document in the past, and built-in access
 management controls can all reduce friction when collaborating.
- Talk to your employees, and iterate

 After creating your knowledge repository, don't think of it as set in stone.

 Have periodic check-ins with employees via surveys, interviews, or in-application feedback to understand what is working well and where you can improve knowledge access and use.





Bryan Cave Leighton Paisner (BCLP) was formed from a merger in 2018, greatly expanding its in-house expertise. However, the knowledge opportunity relied on 1,300+ lawyers across myriad time zones learning to operate as one global team. That meant surfacing the right documents at the right time and knowing

which experts to call on to create an optimal client experience.

"We tried a number of different vendors without really achieving what we set out to do. They couldn't give us the level of support we needed or fully understand the importance of what the technology could deliver to the firm," said David Boulds, Head of IT Solutions at BCLP.

With iManage, the firm built an intelligent legal search platform combining the document management capabilities of <u>iManage Work</u> with <u>iManage Insight</u>. Globally distributed lawyers can now routinely unlock insights on a worldwide scale, using the platform to achieve results that were previously out of reach.

"We're keeping a close eye on how the iManage product suite continues to evolve," adds Hayley Harris, Global Director of Central Knowledge Management at BCLP. She adds that there's still huge potential to incorporate generative AI and take it to the next level with auto-tagging and expanded data indexes. They'd also love to use AI to proactively suggest content to staff in a more targeted and personalized way.



Takeaway

Reduce complexity and increase clarity in the way knowledge is collected, stored, and used in your business to take you one step farther on the path to a knowledge-led organization.



Move from silos to synergy

Our merger brought together two businesses with different approaches to document management and technology. Our data was siloed and we lacked a central document management strategy. We needed a standard way of working on one platform to help lawyers find relevant information quickly and use historical data to shape their strategies on deals and litigation.

Hayley Harris

Global Director of Central Knowledge Management at BCLP

People were using email to share documents. There was duplication, and staff were losing files or forgetting which was the correct version. We needed a single source of the truth. We needed a document and email management system.

Tim Moonens
IT Director at PMV



Our legal team works in the document management system from initial draft through to final copy. Document management plays a huge role in the work they do.

Brien BergnerManager, Legal Operations at Gilead

iManage [AI] is able to quickly and accurately capture the specific pieces of data from the raw documents within our document estate. This will significantly improve our efficiencies and help reduce the claims processing time.

Abby Ewen
IT Director, BLM

We want to operate as one entity, but that means factoring in different time zones, government policies, and regional data protection regulations that impact how we share documents.

Jelena Bosnjak

Head of Business Development, Marketing and Communications, CMS Austria

Different teams, working in isolation, each armed with valuable insights and information but with limited or no communication between them. Sound familiar?

- · Efforts are duplicated because people lack visibility into other teams' work
- Business strategies are not supported by team goals due to inadequate communication
- Decisions are inadvertently made based on incomplete information

Most importantly, opportunities for innovation and growth are lost because no one is seeing the whole picture.

Many business leaders are familiar with this pattern but may struggle with finding or implementing solutions. In this section, we dig into the negative impact that knowledge silos can have on a business, why they persist, and how to dismantle them.

The business impact of knowledge silos

Employees are not as efficient or effective as they can be because they don't have access to the collective knowledge of the organization, which can put business outcomes at risk.

Challenges frequently discussed by decision-makers include:



Strategic misalignment due to prioritizing short-term productivity over long-term planning



Insufficient cross-functional learning opportunities leading to an inconsistent employee experience



Insufficient business mobility resulting in fragmented decision-making



Employee frustration with not having the information they need to be successful



Lack of cross-pollination and loss of the unrealized benefits to be gained from diverse perspectives



Increased security risks stemming from overly complex, unknown, or unexplained policies



The hidden costs of rework and redundant processes



Silo drivers

Specialized teams need specialized IT systems

Over time, IT systems can become fragmented due to the different tools, capabilities, and security levels required by different teams.

Lack of standardization and training in knowledge management

Without standard processes and a common framework, teams often develop different approaches to meet similar ends.

A competitive workplace, where knowledge may be hoarded

A highly competitive work environment where teams perceive knowledge as a source of power can discourage open sharing.

An effort to build highly specialized teams

Some leaders unintentionally create silos by training their team's focus on their specialty and filtering out anything they view as a distraction.

Efforts to reduce complexity

Sometimes a well-intentioned effort to shield people from information overwhelm results in knowledge silos.

How to break silos down



Implement integrated platforms with modular solutions that accommodate specialized team requirements.



Offer comprehensive training to ensure employees are proficient in using collaboration and knowledge management tools and are familiar with your organization's knowledge management policies/processes.



Foster a culture that values collaboration, knowledge sharing, and cross-functional communication.



Encourage the creation of crossfunctional teams, projects, and initiatives that broaden the knowledge and expertise of employees.



Simplify access to and use of your collective intelligence, making gold-standard business knowledge or best practice readily available to people as part of their daily work process.





JFK Law is a mid-sized Canadian firm that represents Indigenous communities seeking justice and reconciliation. They worked on complex cases with huge volumes of documents and matters that could span decades. Their on-premises document management solution required lawyers to manually fill

in document cards every time they stored a file, individually password-protect files, and manually set up ethical firewalls to secure client data.

"Document management is at the heart of everything we do," explained Monique Cotton, Manager, Legal Support Services and Firm Operations, JFK Law. "Inefficient processes were impacting our productivity, and we were losing billable time."

These tedious processes also resulted in low compliance, creating data silos with documents saved in emails, and threatening to expose the firm to unacceptable risk. JFK was impressed by the rich feature set that the iManage Cloud platform offers to support a hybrid workplace and make life easier for lawyers. The firm now uses iManage Threat Manager and Security Policy Manager to ensure company-wide compliance with document management policies and clients' ethical requirements. iManage Work 10 is integrated with Microsoft Office and Adobe Pro, and the efficiency gains have dramatically improved work life for JFK Law's employees.

"We use it across the whole organization, from lawyers to the finance team, and from support staff to higher management," says Cotton. "iManage makes our services more cost-effective for clients and means we can focus on higher-value tasks."



Takeaways:

Addressing knowledge silos requires a multi-faceted approach that involves cultural, technological, and structural changes within the organization. It's an investment, but the effort is worthwhile, paying dividends in greater productivity, collaboration, and innovation.

Move from vision to reality

Many decision-makers recognize the value in improving knowledge management and growing in knowledge maturity but find the path to achieving these goals is not always clear. In this section, we explore some proven tactics for strategically aligning people, processes, and technology with the key drivers of knowledge work maturity to help turn your vision into reality.

First, your people

Create excitement, mobilize, and cultivate knowledge advocates among your teams.





Best practice

Emphasize and celebrate how knowledge sharing and knowledge maturity can drive better business outcomes.

Talking about metadata, file structures, and access management is going to make some employees' eyes glaze over. Communicate in simple terms how better knowledge management enables better business outcomes and quantify the impact.



Best practice

Create a culture that learns from employee expertise.

- · Identify and nurture your knowledge champions.
- · Celebrate a new best practice discovered by an employee.
- Encourage cross-pollination with cross-team initiatives and events.

When you underscore how employees, their expertise, and their unique point of view are differentiators for your business, both internally and externally, you create employee good will in addition to boosting your business reputation among clients and potential future applicants.

Then, your process

Provide the policies and procedures employees need to consistently succeed.





Best practice

Prioritize streamlined and frustration-free access management.

Security, compliance, and access management are among the most frequently cited barriers to knowledge sharing. In addition to using intelligent access management solutions, ensure that your employee training and documentation address key access management questions and pain points.



Best practice

Create clear, well-documented policies around knowledge capture and storage.

From which metadata or tags to add when saving a document to when to revisit and update information — ensure that knowledge management procedures are clear, concise, and easy to follow. But beware of making policies so restrictive that employees are tempted to bypass system safeguards and save information on personal devices and drives.

Next, your technology

Provide the platforms and tools necessary to share, access, and action collective knowledge.





Best practice

Use a modern, cloud-based platform to establish a single source of truth.

Choose a platform that ...

- Employees can access anywhere, anytime with mobility options that align with modern remote and hybrid work trends
- · Has intelligent tools for improved discoverability, document processing, security, access management, and more

- Is modular and can be customized to meet the needs of different teams without leaving the platform
- · Can scale with the growing volumes of knowledge and data that modern businesses contain, and the increasing variety of form factors



Best practice

Consider innovative uses for AI and automation in streamlining knowledge workflows.

Intelligent document search, processing, reviews, and contextual document linking are particularly important.

Finally, iterate and optimize

Knowledge maturity is an ongoing commitment



Continue to learn from your employees, your partners, your vendors, and other thought leaders in the industry.

Bear in mind that best practices, innovations, rules, and regulations are fluid and evolving and your knowledge strategies, processes, and technology will need to shift as they do. Above all, keep finding ways to listen, iterate, and optimize.

While we 'lifted and shifted' our tin boxes offsite to a data center, we also embraced the cloud, adopting Azure cloud for as much as possible of our estate. Real-time access to data is a powerful capability and cloud technology provides different ways to retrieve, manage, and search the data that applications stored in silos in tin boxes of servers simply don't.

Simon Brown

IT Partner, MHA Tait Walker

We realized
we had been
spending 14
percent of our
time just filing
and looking for
things — 2,400
personnel hours
a month.

We haven't even tapped into everything iManage has to offer. It has evolved to be so much more to us than simply a storage system.

Maggie McVeigh

Product Owner, Legal Knowledge Management, Liberty Mutual

Colin Gin

Assistant General Counsel, Office of the General Counsel, Asian Development Bank

If you don't get the foundation right, it's like building on sand. BT needed a foundation solution that let them entertain advanced capabilities, that could sit within the cloud cohesively, and that met their compliance standards.

David Griffin

Head of Legal Technology, British Telecommunications (BT)

iManage gives us so much robust functionality. It's a real benefit being able to focus a particular feature set to help a particular team be more productive.



Manager, Legal Operations, Gilead

It is no surprise that accountancy firms are reaching for the cloud in how they securely store, organize, and retrieve their business-critical knowledge.

Rob van der Drift

Account Manager Accountancy, IRIS Nederland





Burges Salmon understands that delivering consistently exceptional results for its clients depends on its legal teams' ease of access to the firm's preserved collective knowledge. Increasing accessibility requirements posed an opportunity to update the firm's 15-year-old knowledge system.

"It's important for any law firm, whatever the size, to recognize that it's a knowledge-based business. We all want to find that gold standard knowledge and make it accessible for people to reuse. That's where iManage shines," said Carol Aldridge, Head of Knowledge Management and Information Systems at Burges Salmon.

The interface needed to be fast and intuitive to help the firm's PSLs share documents and metadata, including standard form precedents and best practice know-how. The system also needed to be customizable, scalable, and taxonomy-ready to ensure lawyers' searches would yield relevant results quickly.

"The idea is to crystallize this know-how and add it to the knowledge management system in its very best state [so that] our lawyers can start from the best work the firm has done," Aldridge explains.

Team members from IT and Knowledge combined forces with the PSLs and iManage consultants to optimize the firm's Knowledge Management function. The well-managed, collaborative project established an efficient document submission workflow and increased the speed, quality, and consistency of Burges Salmon's lawyers' work, inspiring strong adoption and new use case proposals among teams throughout the firm.



Takeaway:

To turn your vision into reality, strategically align people, processes, and technology with the key drivers of knowledge work maturity. Create excitement, mobilize, and cultivate knowledge advocates among your teams. Provide the policies and procedures employees need to consistently succeed. Deliver the platforms and tools necessary to share, access, and action collective knowledge. And finally, iterate and optimize, keeping in mind that knowledge maturity requires continued effort.

Where does your organization sit now in our knowledge work maturity index?

Every journey starts with a logistical question that goes something like, "How far are we now from where we want to be?"

Going the distance means answering some important questions and, above all, getting a map or directions. You can achieve your knowledge work goals, but first, you must get the lay of the land. iManage has developed an in-depth report to help you understand the most important factors in building knowledge maturity in a modern business. By answering some key questions, we can identify what drivers you are already strong in, where you need to focus your efforts, and how you compare against similar organizations.



The <u>iManage Knowledge Work Maturity Hub</u> is a veritable treasure trove of information. Watch a brief video, read a few essays, and find out your current knowledge maturity status using our free modeler.

Download the <u>iManage Knowledge Work Maturity report</u> and our analysis of the report, <u>Knowledge is the New Global Currency</u>. Come back often and see what's new, or what you might have missed.

Check it out now and be sure to connect with iManage at our next event.

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 20 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 Al-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.

Visit https://imanage.com to learn more.

