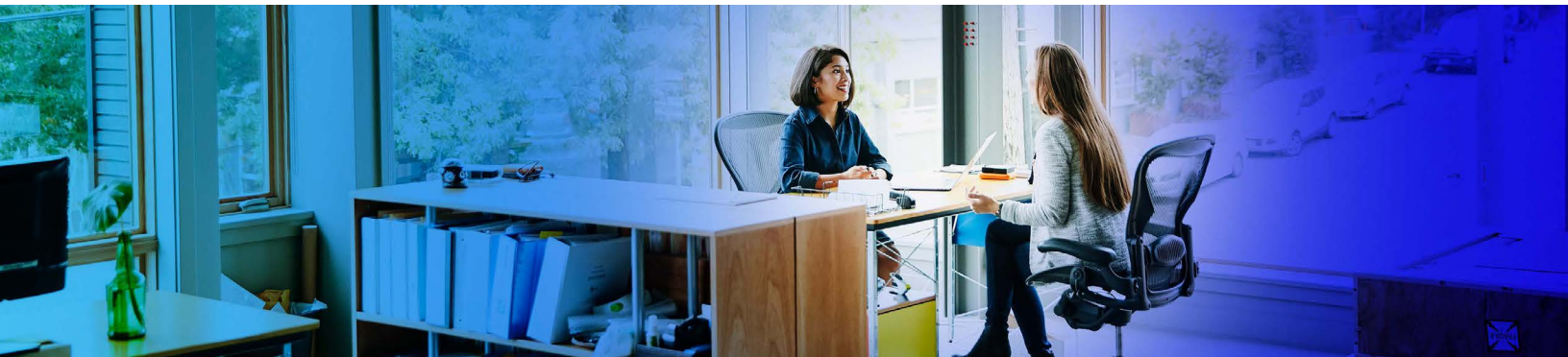# Rapid growth spurs Menzies' move to scalable, cloud-native DMS with 99.95% uptime

UK accountancy simplifies user access to its 20 M documents for 1,000+ employees with seamless integrations to "system of truth" in the iManage Cloud

MENZIES
BRIGHTER THINKING

Industry:
- Financial Services: Accounting

Headquarters:
- London, UK

iManage footprint:
- iManage Work 10 in the Cloud
- iManage Share
- iManage Threat Manager

Partner:

Morae

- Morae Global Corporation is a trusted partner delivering digital and business solutions to companies across the world. It was founded in 2015 and works closely with the legal and professional services sectors, striving to help customers to implement meaningful change.

Menzies was on a rapid growth trajectory when the firm decided to update its document management strategy. Their existing solution, Virtual Cabinet, had not been well implemented and, as a result, was not widely adopted across the business. Leadership envisioned a single source of truth that everyone would use — a highly secure and reliable cloud platform they could easily scale as the number of workers, clients, and documents expanded. Menzies looked at the available options, including iManage, NetDocuments, M-Files, and Repstor (now owned by Intapp). Their evaluation included demos, internal user surveys, and reaching out to their wider network to see what others were using successfully.

When it came down to iManage and NetDocuments, Menzies chose iManage as the more robust platform. iManage had a stronger presence in the accounting sector and was judged the best value. iManage partner, Morae, completed Menzies' implementation in under two months, and minimal user training was required. Five years on, having increased its staff threefold from 350 to 1,100 and its document volume from 10 to 20 million, Menzies users can't imagine life without iManage. Document searches are infinitely better, the intuitive interface and seamless integrations make usage a breeze, and system uptime is nearly 100 percent.

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Daniel Denton, IT and Innovation Director, Menzies

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IT and Innovation Director
Menzies

Menzies is a leading UK business advisory and accountancy firm with international reach. Founded in 1912, the company's present workforce is distributed across 11 offices in the UK, where they serve midsize to large private companies, non-profits, and individuals. Industry sector specializations give the firm a competitive edge and help them stand out as a trusted advisor in audit, tax & compliance, accounts advisory, financial planning, and transaction services.

The business challenge

Prioritize user satisfaction during exponential growth

Menzies believes that happy employees create the best client experiences. As the firm increased its footprint, leadership aimed to preserve this differentiator. Adoption of the business's legacy document management system (DMS), however, was growing increasingly siloed as the company expanded.

"Although a couple of teams used the DMS, which was called Virtual Cabinet, the rest saved documents on shared drives or in personal folders," said Daniel Denton, IT and Innovation Director at Menzies. "The pain point was less around finding information in the documents and more around finding the documents themselves."

Menzies' client relationships are naturally centered around these documents, so simplifying user access to that information was key to making work easier and more productive for employees. Denton took a fresh look at its document management processes and decided to seek a more scalable, user-friendly, cloud-based solution to support its workers, while also establishing firm-wide data policies and governance.

"We made the strategic decision to find a new DMS to support growth and consolidation, while making client information more readily available," explains Denton. "It needed to be a modern, web-based system with a clean interface and high uptime. A lot of the work we do is in spreadsheets, so we also looked for strong compatibility with Microsoft Excel."

The solution

Find the best document management system for accountants

"To find the best DMS fit for Menzies and its employees, we compared the cloud version of Virtual Cabinet against M-Files, Repstor (now part of Intapp), NetDocuments, and iManage," recalls Denton. "Our evaluation included demos, employee feedback from surveys, and external outreach."

The goal was to learn all they could about the available platforms and the experience of firms like Menzies with them.

"Virtual Cabinet and M-Files didn't have the approach we wanted, so we ruled them out quickly," Denton remarks. "We considered Repstor (Intapp), but its dependence on Microsoft SharePoint for document storage made us uncomfortable; we worried about changes in licensing agreements or performance."

Denton continues, "The final decision came down to NetDocuments and iManage. iManage has a greater presence in the UK accountancy sector and handles linked Excel spreadsheets better than NetDocuments. We also observed that firms using iManage were happy to keep using it over the long term, whereas those who chose a competitor were more likely to have had issues or switched solutions a few years later."

Streamline implementation with change management experts

Menzies migrated its 10 million documents to the iManage Cloud platform and, with highly experienced partner Morae, it took less than two months. "iManage was quick to stand up the cloud account," Denton recalls. "User setup is straightforward." He adds that it's deciding how to structure your workspaces, which documents to migrate, and the templating that takes a bit of time. Denton says the firm's strict seven-year retention policy is a time-saver when you are migrating files; it helps keep the data clean and relevant.

To deliver the initial in-house training to staff, Menzies engaged a training partner. Post-training, however, he says users happily use iManage-provided resources to learn more about specific features as needed. Staff can help and advise one another, too, since nearly everyone at the firm uses the platform.

Create a single source of truth

Denton aims for iManage to be the firm's "gold standard;" their system of truth.

Menzies appreciates the seamless integration of iManage Work 10 with Microsoft 365. "We're integrated with Word, Excel, PowerPoint, and Outlook — and are exploring the iManage Copilot integration," says Denton. The platform is also connected to client portals, enabling auto-import of documents and reports. They've integrated DocuSign to allow signed documents from clients to be automatically pushed into iManage. The firm's cybersecurity solution is also integrated with iManage.

"iManage integrations are super helpful," says Denton. "Whenever anyone creates a new client or a new service within our practice management solution, for example, a workspace is automatically created in iManage. That brings clients, jobs, and general metadata, like partners and managers, right into the workspace without any extra effort."

iManage Threat Manager gives the firm clear visibility into how people are using the platform — from whether they're working in the right folders and workspaces to spotting unusual activity, like excessive printing or unauthorized access attempts.

"iManage is truly omnipresent in our digital environment," said Denton. "We have around 1,000 active daily users who can securely access the platform from anywhere — whether through mobile, laptop, virtual desktop infrastructure, Office 365, or our internet browser."
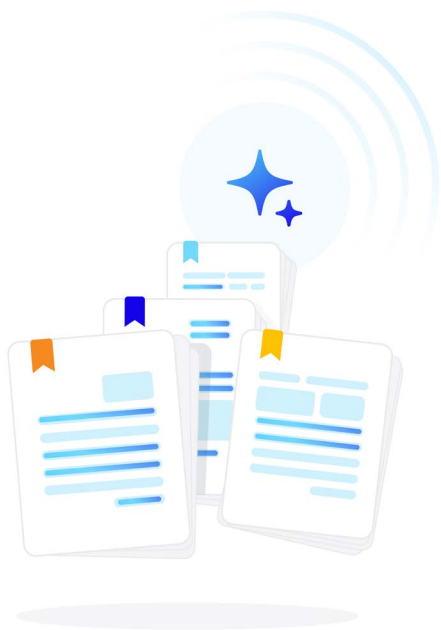
Collaboration tools help speed up work on projects

Hard-to-find documents are a thing of the past. That's because with all of their major workplace apps integrated with iManage, people consistently save their documents in the right location. When clients share documents with the team, those are stored in iManage, too. Every change and iteration is tracked until a final set of accounts or reports is generated, creating a clear audit trail.

"iManage tracks everything, so we can see all the work done so far for each client and understand what the next steps are," confirmed Denton. "Now, when staff need a document, iManage search can surface the right one in seconds, even without an accurate file name." That's a world away from pre-iManage days, when success in locating documents was far less certain. This "findability" makes collaboration with clients much faster and less stressful for employees.

"We're going to start using iManage collaboration tools to speed up working on projects together," says Denton. "We anticipate it will add value to some of our service lines while giving us a more cost-effective way of collaborating with clients." To that end, the firm is piloting iManage Share.

The business outcomes

Answer questions and provide relevant, tailored advice faster than ever

Denton says "You know a DMS is doing its job well when no one mentions it. They're happy, they're productive, and we don't need to invest in continuous training."

IT staff also don't need to spend their time on platform maintenance because updates happen automatically with no downtime or drama, and the functionality is consistently reliable and high performing. Denton feels confident that the firm's knowledge is centralized, secure, and protected, which reduces the firm's risk index.

"It's liberating not having another platform to look after," he observes. "iManage has great uptime, so I'm not concerned about outages, and the company takes security seriously, so I am less concerned about risk."

Menzies' users benefit from iManage with faster filing, better findability, ease of access, and a single source of truth. Everyone agrees it would be hard to imagine life without it. Unlike many applications, it doesn't cause issues; it integrates well, and both staff and leaders are satisfied with the platform.

"iManage just works. People get on with it, people use it, people can find documents when they need to," affirms Denton. "I implemented iManage when I started with Menzies, and it's hard to imagine my role without it."

This helps the firm achieve its goal of delivering a superior client experience. Accountants can answer questions and provide relevant, tailored advice faster than ever, and that helps Menzies maintain its competitive edge.

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"iManage is a great investment," concludes Denton. "It's good value for the money, and everyone is happy using it. Much more than a DMS, iManage is a trusted partner. The team is easy to work with, whether we need information for compliance reports, want support, or we're working on a renewal."

Menzies also rates the iManage partner ecosystem highly, praising both Morae and iTrain for helping ensure their implementation was a success.

Looking ahead

Menzies' takes a practical approach to AI — and that is to use it where it can enhance the work its people do while keeping a human in the loop. The team look forward to using iManage AI Enrichment to automate document classification and to extract more value from firm knowledge. Users will be able to see at a glance what a document contains and route key documents to the right people without opening and reading it. Denton anticipates that this will change the very nature of how staff file and retrieve information. Making legacy documents more accessible will help them understand and serve clients better.
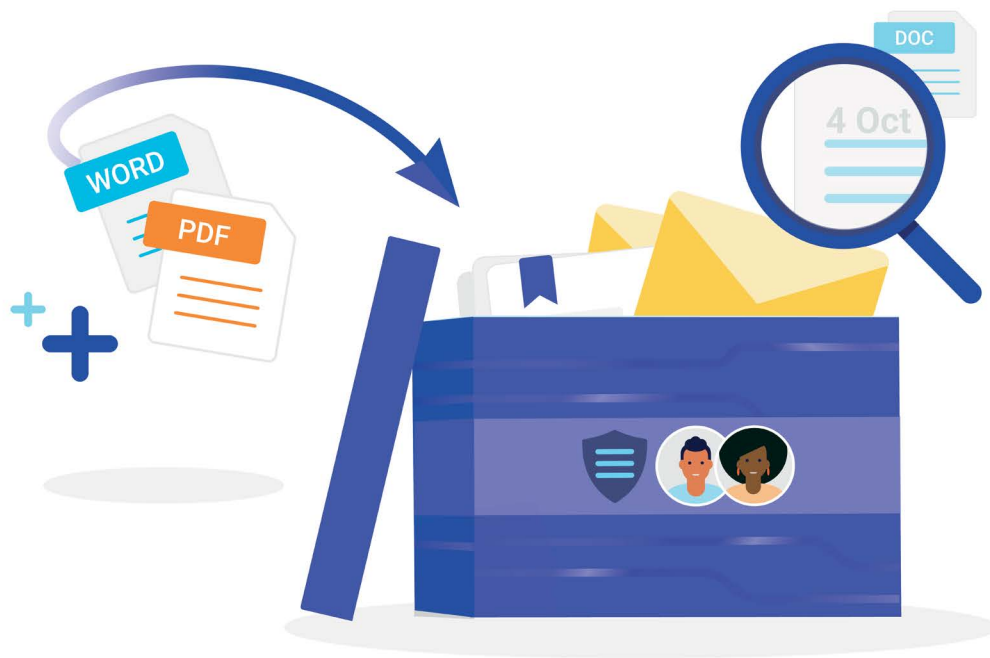
About iManage

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.

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Making knowledge work

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