iManage

Making knowledge work

MANAGEMENT CONSULTING FIRM STREAMLINES BUSINESS DEVELOPMENT WITH iMANAGE

Conflicts management team automates its search process with iManage Conflicts Manager

Industry:

• Management Consulting

Headquarters:

• North America

iManage footprint:

• iManage Conflicts Manager

The conflicts management team in this prestigious global management consulting firm needed a more advanced solution to identify potential conflicts of interest and provide more granular results for the approximately 2000 users involved in conflicts clearance activities. The existing system lacked strong search capabilities — making the conflicts team's process largely manual and time-intensive — which slowed their business development workflows. Using iManage Conflicts Manager, the consultancy found the fast and comprehensive search results they needed to meet the legal team's requirements. The customer reported excellent results, including the realization of the anticipated time savings, and stated that the ongoing support is what differentiates iManage from its competitors.

A global management consulting firm with headquarters in North America and decades of experience, this iManage customer helps its clients around the world meet their business challenges head on.

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iManage Conflicts Manager itself is great, but there's a very strong team of people at iManage, standing behind the product, supporting it, and doing all that they can to help us, or any other customer, be successful. Everybody is genuinely concerned with our success, both in the implementation process and now, a year later.

IT Manager, Global Consultation Management Enterprise

The challenge

Automation and a more granular conflicts search process was key

Clearing conflicts is vital to the firm, dictating whether they can take on a new project. The conflicts team in the legal group conducted their conflict searches in a system fundamentally designed for finance purposes and a separate ERP lead system, which offered very little in terms of flexibility to meet the firm's specific requirements.

Because the legal group shared data with the finance team and the two groups had different needs, IT was unable to address the functional limitations of the system or modify the search parameters to add detail that was important for conflict searches. This created a large amount of manual work for the conflict management team.

"We wanted to eliminate a lot of manual work that was taking place. That was the key thing — to automate the conflicts search process," said the IT manager.

As they evaluated vendors, the critical factors they looked for in a solution included the ability to easily narrow the results of a broader conflict search with more sophisticated search technology. To cast a wide net and easily narrow that down to the parts that pertained to the prospective client. And to not just search for, but to organize and filter the results, and to have those search results available for future reference.

The solution

Impressive project management, smooth implementation, "just a great experience"

The firm's evaluation led them to iManage Conflicts Manager, which aligned with their vision. With optimized search and analysis, tailored reporting, and flexible conflicts issue clearance handling via desktop or mobile, Conflicts Manager appeared to be an ideal solution to address the team's challenges. Its intelligent search processing would help them streamline their work by quickly performing simplified conflicts check processes. iManage research showed that the time savings could be up to 75% in conflict clearing and up to 90% in identifying conflicts.

The firm's IT team partnered with their legal team for the implementation. iManage professional services group helped the IT and legal teams plan their business requirements and define their functional requirements. Calling the iManage personnel "a very sharp team of individuals," the IT Manager said she was impressed by their methodology and execution.

"They really partnered with us to help us create a very detailed set of documents that described our current state, and then to map out how we were going to get to our future state with the iManage solution," added the IT Manager.

This enabled IT and the legal team to go into the build with clear expectations on how it was going to be configured and how it would work, how they would migrate their data and map it. All that planning meant the implementation rolled out exactly as they had anticipated.

"It was very well planned. The execution went well because of the effort put in on the front end, with iManage. It was a great experience," the IT Manager shared.

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IT Manager
Global Consultation Management Enterprise

> We wanted to eliminate a lot of manual work. That was the key thing — to automate the conflicts search process. With iManage Conflicts Manager the team can move faster and accomplish more.

IT Manager
Global Consultation Management Enterprise

The benefits

Busy knowledge workers save time by automating manual tasks

The flexibility of the system enables the conflicts team to organize the results that come through and respond quickly to changing requirements. They also told us that the iManage product team is very open to suggestions and have been very willing to help along the way, either by adding new functionality or by finding another way that the team can accomplish their goal.

"We've fine-tuned iManage Conflicts Manager a little bit just in terms of how we want to sort the different results and so we're very happy that it is flexible like that," said the IT Manager.

Of the approximately 2000 employees that the IT Manager told us could potentially be involved in conflicts clearing, even the more peripheral users report that the system is very easy to use, email communications are very clear, and the interactive conflicts clearance dashboard is intuitive. People are using Conflicts Manager "on the fly," at customer sites, or working remotely from home. They say that everyone has been happy with the product and especially with the service.

"The team supporting the Conflicts Manager solution is truly concerned with our success," the IT Manager said.

Looking ahead

"It's just been so great to work with the people at iManage, they've been wonderful. I have a lot of confidence in the product that we're using, and I would love to dig in further," the IT Manager said.

She told us that AI is an area that her organization is constantly looking at to see whether the products are ready, whether the company can take them on with confidence, and that these two broad strategies, cloud and AI, will be at the top of their priority list for a long time.

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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