



iManage

Making knowledge work

iManage Guide

Cultivating a Knowledge-Led Workplace for AI Excellence



Contents

Editor's note	3
Introduction	
Who should read this and why	4
Section 01	
Move from a productivity mindset to a culture of collaboration	6
Section 02	
Move from complexity to clarity	12
Section 03	
Move from silos to synergy	18
Section 04	
Move from vision to reality	23
Conclusion	
Where does your organization sit now in our knowledge work maturity index?	30

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AI outcomes are only as strong as the foundation behind them. Most organizations find this out the hard way: through outputs that can't be trusted any more than a house built on sand.

The reason is that when an AI model lacks access to an organization's own work — its documents, its decisions, its matter or project history, its prior positions — the outcomes it delivers or the decisions its agents act on are derived from generic or incomplete data. That's useful for some things, but the results that matter most rise from the organization's own, more comprehensive knowledge.

A·gent

/āj(ə)nt/ *noun*

1. "Agent" refers to an artificial intelligence (AI) system or program that can perform tasks on behalf of a user or another system with varying degrees of autonomy.

Businesses that solve the knowledge problem first are getting real value from AI. The competitive advantage increasingly comes not from giving AI **more** data but from giving it **your** data. Proven knowledge that AI can use to reason through tasks and, ultimately, to fulfill them. Most importantly, this is governed knowledge built on a trusted foundation — a single, structured record of how the organization works and what it collectively knows. A source its leaders can stand behind.

That is what this guide is about. The four moves it covers — from productivity to collaboration, from complexity to clarity, from silos to synergy, and from vision to reality — are more than just good knowledge management practice. They are the steps that build an AI-ready foundation: one where AI moves beyond answering questions to taking action, automating workflows, and coordinating agents — all grounded in how your business runs.

Those who make this investment now have an advantage over those who don't. Without the benefit of governed knowledge and business context, even the priciest AI tools will give you generic, unreliable output that diminishes your ROI.

Who should read this and why

Many organizations struggle to put their business knowledge to work. Too often, that knowledge becomes siloed, underused, or simply lost.

When that happens, leaders and knowledge workers can't draw on the business's actual knowledge to, for just one example, identify contractual clauses that deviate from, or are missing relative to, your organization's approved legal standards and playbooks. The knowledge gap becomes a missed opportunity for better collaboration, sharper decisions, and stronger outcomes. Taken together, they add up to a real competitive gap.

Leaders know they need to do more with their organization's knowledge. The challenge is knowing where to start and how to build momentum.

Some common questions we hear:

- How do businesses like ours break down knowledge silos and build genuine collaboration across departments and teams?
- How do we control what AI has access to in our knowledge environment?
- How do we govern AI and agents so they operate securely, responsibly, and in line with business objectives?
- How can we establish workflows that exert control over AI without a prohibitive level of enforcement?
- How do we get AI answers that are reliable and differentiated without exposing sensitive data?

In this guide, we take these challenges head-on. We offer practical insights to help your organization thrive in an era where knowledge is more than an asset — it's the foundation that determines whether AI, decisions, and people work well together.

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 knowledge work organizations:

- Are customer-centered and prioritize shared value in every interaction
- Value both historical knowledge and fresh perspectives, and build a culture of continuous learning
- Actively recruit for varied experiences and points of view
- Invest in employee satisfaction and empowerment
- Capture knowledge in a form that people and approved AI tools can reason from



If firms don't get serious about formalizing knowledge management, change management, process improvement, and the strategic adoption of advanced technology into the workflows and daily life of the attorney and staff, I believe they're going to fall behind. [Full story here](#)

Scott Jablonski, Technology Innovation Partner, Berger Singerman



We are proud of what we've achieved so far, and excited to explore how iManage uses AI to help customers like us get even smarter about knowledge management in the future. [Full story here](#)

Colin Gin, Assistant General Counsel, Asian Development Bank

As we look at mature knowledge work organizations, a clear pattern emerges. These are not simply workplaces with good filing habits. They are places where knowledge moves and is continuously leveraged and enhanced to drive better decisions — where people feel confident in the work they do and produce outcomes they can stand behind.

This guide explores how to bring those principles into your organization, with data-led insights and practical ideas for building a modern, knowledge-led business that's ready for AI. Not only AI-powered insights, but also for agentic systems that can reason, decide, and act with the right context and governance.

Move from a productivity mindset to a culture of collaboration



A modern, knowledge-led workplace doesn't focus simply on productivity. It treats collaboration as the catalyst for better relationships, stronger decisions, and more sustainable results. Giving equal weight to knowledge sharing encourages employees to participate in cross-team work that raises both satisfaction and overall effectiveness.

Think of collaboration as a catalyst for enhanced productivity

Collective intelligence only exists where collaboration and knowledge sharing are prioritized.

When collaboration takes a back seat to productivity, cross-pollination and knowledge sharing are set aside in favor of more immediately visible fee-earning activity. Both the employee experience and business outcomes suffer as a result.

AI is often framed as a productivity tool, and it is very good at making individuals faster. But a better first draft produced in a private chat window is a gain that accumulates nowhere: no precedent, no captured decision, nothing the next person or the next matter can use.



iManage makes collaboration much easier. For our lawyers, they can easily access documents from any Fasken library, and the new folder structures make it faster to pinpoint the document's location. For our clients, we can invite them into a closing room in iManage Closing Folders to give them controlled access to relevant documents while keeping company data secure.

[Full story here](#)

Andrea Alliston
Partner, Knowledge and Practice Innovation, Fasken



iManage co-authoring is a game-changer. It changes how we work internally, motivates adoption, and massively improves how we work and collaborate with our content. The productivity gain is immeasurable.

[Full story here](#)

Mike Peters
Information Manager, RSM Australia

Collaboration is no longer valuable solely because it helps people share knowledge. It also enhances the governed intelligence layer that AI needs to understand context, identify patterns, and support consistent execution across matters and projects. Every shared document, discussion, decision, and precedent strengthens the organization's ability to scale expertise through both people and AI.

By giving equal support to collaboration and process improvement, a business lays the foundation for faster, better decision-making grounded in recorded collective knowledge rather than capricious human memory.



Spotlight: CMS Austria

Secure client collaboration across 11 offices



CMS Austria is the digital headquarters for 11 CMS offices across Central and Eastern Europe. But without a comprehensive document management strategy and platform, the firm wasn't eligible to compete for certain types of legal matters and risked losing business to competitors.

"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," says Jelena Bosnjak, Head of Business Development, Marketing and Communications.

The firm centralized 320 employees on [iManage Work 10 in the Cloud](#), adding [iManage Drive](#) and [iManage Share](#) so that external partners and interns could work with clients without full access to the firm's systems and data. Need-to-know and deny-by-default policies govern the rest.

"iManage Share lets us collaborate and share documents securely with clients, quickly and intuitively," says Thomas Kroupa, Head of IT.

The firm now bids for work it once could not pursue.

"iManage makes us more attractive to clients, more efficient, and helps us streamline operations across 11 regions," says Bosnjak.

Read the full [CMS Austria](#) customer story.

Invest in collaboration initiatives

There are many ways to encourage collaboration, from low-cost cultural changes to more significant investments in your technology stack. The most effective approaches combine both.

Collaboration initiatives: ideas and best practices



Celebrate, share, and promote collaboration wins and best practices. Publicly recognize what good knowledge sharing looks like — in newsletters, town halls, on intranets, and beyond.



Incentivize cross-departmental work. Formalize skill exchanges, cross-team projects, and learning sessions organized around specific roles or specialties.



Create opportunities for cross-departmental and cross-office connection. Introduce people who don't work together day to day. Informal interactions build the trust that makes formal collaboration easier.



Train teams on how to get the most from existing collaboration tools — including best practices from across the business and practical guidance from your vendors and partners.



Build and maintain a central knowledge repository. Set clear policies for when, how, and why to contribute to it — and make contributing feel natural, not like extra administration. The “why” is stronger than it used to be: people put in what the business, and any AI it trusts, can draw on later.



Embrace cloud-based work environments that support real-time collaboration wherever people work.



Adopt governed knowledge management platforms that let collaboration and knowledge flow across the business without friction, applying the same governance whether the requester is a colleague or an approved AI tool.

Remove collaboration barriers

A [study](#) of more than 3,000 business and technical decision makers identified the most widely discussed challenges to collaborative work. These barriers frustrate workers and carry real risk for project and business outcomes.

Top-cited obstacles to effective collaboration across teams:



Why it matters: Collaboration leads to better business outcomes

Even small improvements in collaboration and knowledge sharing can produce better outcomes across the whole business. Thirty-four percent of organizations say AI is requiring collaboration between new and existing roles — one of the named ways AI is reshaping roles. This climbs sharply with knowledge maturity levels, from 24 percent in the least mature organizations to 42 percent in the most mature.

Other related AI-role effects they report include:

- Automating administrative tasks **(59%)**
- Enhancing productivity via first drafts/edit suggestions **(58%)**
- Improving productivity in analyzing/summarizing/synthesizing **(53%)**

Collaboration should not be a company or organization-wide business goal or objective itself. In the quest for collaboration that unlocks knowledge, people, processes, and tech should align around a knowledge management strategy that facilitates positive outcomes.



Takeaway

Business success and knowledge maturity depend on more than productivity. When collaboration and knowledge sharing are executed well, the impact goes well beyond time saved. Decisions get better, AI outcomes improve, and the organization builds a framework that grows stronger over time. That is what turns individual contributions into lasting organizational value.

Move from complexity to clarity



We are living through an explosion of data and the knowledge that can be drawn from it. Organizations can tap into this to gain deep insight from the market, their customers, vendors and partners, leadership, knowledge workers, and beyond – and that opportunity continues to grow, as worldwide data production is expected to rise [22 percent](#) this year alone.

For all the value it creates, this abundance also sharpens the complexity we raised at the outset. Decision-makers grapple with questions like:

- How do we create a central repository when different teams use different systems?
- How do we capture the knowledge that individuals bring through their education, experience, and expertise?
- What policies motivate employees to contribute to, maintain, and actually use the organization's collective knowledge?
- How do we govern and protect that knowledge without blocking access for the humans and agents who need it?
- How do we ensure AI and agents can access the right knowledge and context to deliver reliable outputs and take effective action?

These are the same tensions this guide opened with, now grounded in the day-to-day reality of managing knowledge at scale. They point to the need for a systematic approach to knowledge capture, storage, and use, both for human users and our agentic future.

“It doesn’t matter how good your search engine is if your data is not classified correctly. Once you have better control of your underlying data, you’re going to get better results. That’s why iManage AI Enrichment will be a game changer going forward.” [Full story here](#)

Nigel Johnson, Technology Director, Finn Dixon & Herling



Spotlight: Digital Commerce Bank

Map the information architecture, govern the content



Digital Commerce Bank, a Canadian group operating a Schedule I bank alongside several fintechs and e-commerce businesses, had documents spread across inboxes, desktops, OneDrive, SharePoint, and file servers. When Paul Twigg joined as Chief Technology Officer, he found at least three separate repositories of vendor contracts alone.

“We’re often on the receiving end of litigation, and being able to find all of the documents associated with a specific subject wasn’t an easy task,” says Twigg.

The bank migrated department by department, mapping each team’s information architecture first. A compliance library of several hundred thousand documents moved over a single weekend, and all 70 users now work on one platform.

That groundwork made artificial intelligence (AI) possible. [Ask iManage](#) is live with roughly 10 users in legal and technology, comparing documents, surfacing duplicates, and drawing insights without content leaving the governed platform.

“Our biggest risk with AI is our documents or our information going outside of our organization in an uncontrolled way,” says Twigg.

Next, the bank plans to connect its AI tools more deeply through the [iManage MCP Server](#), with iManage as the governed content layer.

Read the full [Digital Commerce Bank](#) customer story.



Better knowledge capture

Put metadata to work — and keep adding to it.

Metadata is often underused, but it is a powerful tool for finding, tracking, and connecting knowledge.

More importantly, metadata provides context that helps both people and AI understand what a document is, how it relates to other information, and when it should be used. Consistent metadata improves search, strengthens governance, surfaces relevant expertise, and enables AI and agents to deliver more accurate insights and act with greater confidence.

Build metadata tagging into your process every time you create or update documents. [iManage AI Enrichment](#) alleviates the human burden for this critical foundational work by automatically classifying and extracting key metadata from legal documents at the point of filing.

Recognize and celebrate employee expertise. Knowledge lives in people as well as documents. Build a culture that values individuals and the unique insights they bring to the organization's work. Set clear policies, keep reinforcing them, and manage change. Don't underestimate the "what's in it for me?" factor. Communicate the benefits of collective knowledge sharing clearly, make it easy to contribute, and keep making the case.

The more expertise and context that are captured and shared, the more effectively AI can surface relevant insights, support decision-making, and help employees work from the organization's collective intelligence.



Better knowledge storage

Build a single source of truth. Create the policies, procedures, and systems that make one central repository the natural place to store all new documents, knowledge, and the contextual information that gives them meaning.

Balance security with access. Security is essential, but — when it is not well designed — it can slow down users' and agents' ability to access knowledge. Use modern access management tools and build access management champions across the business so that security never quietly kills productivity.

Audit and refresh regularly. Review the knowledge repository to identify what is outdated, irrelevant, or duplicated, and remove it. Adopt lifecycle governance capabilities that are rule-based and programmatically address preservation and disposition policies. Automate to all extents possible. This reduces the noise AI has to navigate, which makes the results more accurate.



Better knowledge use

Put artificial intelligence (AI) and automation to work — and know where the answers come from.

AI can make knowledge easier to find, with intelligent search, contextual document linking, and automatically generated summaries. But discoverability is only the first step.

Leading platforms now connect matter history, precedent, organizational expertise, and contextual signals into a governed foundation that AI can reason over. The result is a context fabric that gives AI a richer understanding of your organization's work, relationships, and decision-making patterns. This is what separates a generic AI answer from one that is cited, traceable, and grounded in organizational knowledge. It also enables AI agents to move beyond simply retrieving information to supporting decision-making, executing tasks, and acting reliably within the guardrails of your business.

This all depends on a platform that understands how knowledge work happens: how matters are structured, how documents relate to decisions and people, where governance boundaries run, how metadata and context connect. iManage has spent three decades building a platform specifically around that understanding. It is what makes a genuinely governed AI foundation possible, and it is not something a generic AI tool or a new entrant can replicate by adding a search layer on top of a document store.

Make it easier to share and collaborate on knowledge.

In-document collaboration, change history, and built-in access controls all reduce friction when working together. Listen to your employees and keep improving. After building your knowledge repository, treat it as a living system. Regular check-ins through surveys, interviews, or in-application feedback help you understand what works and where access or usability can be improved.



Spotlight: Chaffetz Lindsey

The governance layer that turned out to be the AI prerequisite

CHAFFETZ
LINDSEY LLP

Chaffetz Lindsey, a New York litigation boutique, serves sovereign nations, global financial institutions, and complex international arbitration. Precision is not optional: more than 35 percent of matters carry ethical screens, and the firm has recorded zero data loss in 18 years.

Starting clean on iManage, Douglas Gibson, Director of Information & Information Security, built a matter-centric culture. When the time came to migrate the firm's 2.5 million documents to the [iManage Cloud](#), the move was error-free, with no shadow repositories, and 100 percent adoption.

That discipline turned out to be the prerequisite for artificial intelligence (AI). The firm deployed [Ask iManage](#) in a two-month window, with no staged rollout by practice group.

“The firm’s non-timekeeping personnel could operate and find clauses in precedents as fast as the attorneys because Ask iManage was the tool they were most exposed to. They became its AI champions,” says Gibson.

Chaffetz Lindsey’s next chapter is grounded in the principle that the firm’s data should stay in iManage, and external tools should reach in rather than pulling content out. Model Context Protocol (MCP) will help them stay true to that ideal.

“For an AI-first firm, tools that use MCP will be the first among many,” says Gibson. “Proper APIs and the [iManage MCP Server](#) will replace the manual process of bridging disparate systems.”

Read the full [Chaffetz Lindsey](#) customer story.



Takeaway

Reducing complexity and increasing clarity in how knowledge is collected, stored, and acted upon does more than improve efficiency. It builds the governed foundation that lets AI work reliably — and gives your people the confidence to act on answers and outcomes they can trace and trust.

Move from silos to synergy



Different teams, each holding valuable information, with limited communication between them. The pattern is familiar – and costly.

- Without knowledge of other teams' work, people duplicate efforts
- Team goals and business strategy fall out of alignment
- Decisions are made on incomplete information
- Silos deprive AI and agents of the context needed to deliver reliable insights and take effective action

Conclusions are drawn without full access to the history, precedent, decision, or context. Perhaps without even realizing it, no one is seeing the whole picture. Many business leaders recognize this pattern but struggle to find or implement solutions.

This section explores the real impact of knowledge silos, why they persist, and what you can do to overcome them.



Spotlight: Bryan Cave Leighton Paisner

Breaking out of data silos with iManage Insight+



When two law firms merged to form Bryan Cave Leighton Paisner (BCLP) in 2018, the newly combined firm needed to learn to operate as one global team.

"Our merger brought together two businesses with different approaches to document management and technology," said Hayley Harris, Global Director of Central Knowledge Management at BCLP. **"We had great systems available to us, but data was siloed, and we lacked a central document management strategy."**

They brought [iManage Work](#) and [Insight+](#) together as BCLP Discover, a white-labeled platform giving lawyers across 32 offices in 11 countries a single point of entry to documents, experts, and best practices. In its first six months, lawyers ran 14,000 searches through the platform.

"iManage gives us a competitive edge," said David Boulds, Head of IT Solutions at BCLP. **"Our lawyers can work smarter and meet their clients' highest expectations across all service areas."**

BCLP Discover won three industry awards for its impact on firm-wide knowledge sharing. Read the full [Bryan Cave Leighton Paisner](#) customer story.



Spotlight: Rio Tinto

Breaking down silos across 150 years of expertise

RioTinto

Rio Tinto, the world's second-largest mining company, has more than 150 years of specialist expertise behind it — and a legal team that needs to reach all of it.

"Institutional knowledge is extremely valuable, particularly to the legal team," says Christopher de Waas, Manager of Digital Transformation at Rio Tinto. **"We work on complex and specialist legal matters, often collaborating with external counsel. Keeping that knowledge actionable and accessible is vital to ensure our business runs smoothly."**

Replacing a third-party SharePoint overlay, the company migrated 4.5 million documents to [iManage Work 10 in the Cloud](#) to serve 210 legal professionals across Australia, Singapore, the UK, and North America. The rollout included [iManage Share, Drive](#), and [Threat Manager](#), and adoption reached 80 percent within four months.

Search improved sharply — the team could find what it needed without duplicating effort. The collaboration gain was substantial.

"iManage breaks down silos — enabling Legal to collaborate more effectively, share institutional best practices, and strengthen its partnership with teams across the company," says de Waas.

Read the full [Rio Tinto](#) customer story.



Takeaway

Addressing knowledge silos requires cultural, technological, and structural change. The investment pays off in greater productivity, better collaboration, and the kind of joined-up thinking that leads to real innovation. It also creates the context AI needs to deliver more reliable insights and actions.

The business impact of knowledge silos

When employees and AI agents lack access to the organization's collective knowledge, they aren't as effective as they could be, which can negatively affect business outcomes.

Challenges frequently discussed by decision-makers include:



Strategic misalignment from prioritizing short-term productivity over long-term planning



An inconsistent employee experience from insufficient cross-functional learning



Fragmented decision-making due to insufficient cross-organizational visibility



Employee frustration from not having the information they need to succeed



Lost value from diverse perspectives that never cross-pollinate



Increased security risks from complex, unexplained, or poorly understood policies



The hidden costs of rework and redundant processes

Fragmented knowledge environments do more than hinder collaboration. They prevent AI from developing a complete understanding of matters, relationships, decisions, and business context. Without connected knowledge, AI remains limited to isolated answers rather than informed action.

Why silos persist — and how to resolve them

Silo drivers	How to address it
Specialized teams need specialized IT systems. Over time, systems fragment because different teams require different tools, capabilities, and security levels.	 Implement integrated platforms with modular capabilities that meet specialized team needs without requiring separate systems.
Lack of standardization and training in knowledge management; without shared processes, teams develop different approaches to similar problems.	 Build a culture that values collaboration, knowledge sharing, and cross-functional communication.
In a competitive environment where knowledge is treated as power, teams may hoard information because open sharing feels risky.	 Encourage cross-functional teams, projects, and initiatives that broaden knowledge and expertise across the organization.
Leaders unintentionally build silos by narrowing their team's focus to its individual specialty.	 Make gold-standard knowledge and best practice readily available as part of people's daily work, not something they have to go looking for.
Teams adopt AI tools independently and connect them only to their own local data, creating new AI silos that reflect one team's view rather than the organization's collective knowledge.	 Connect AI to a governed, unified knowledge foundation across systems , so approved AI tools reason over the full organizational context, not just one team's slice of it.
Well-intentioned efforts to simplify end up "shielding" people from information they need.	 Offer comprehensive training so employees are aware of the organization's knowledge management processes and use collaboration and knowledge management tools confidently.

Move from vision to reality



Many decision-makers understand the value of improving knowledge management and building knowledge maturity. Finding the path to get there is often harder. This section explores proven approaches for strategically aligning people, processes, and technology with the key drivers of knowledge work maturity — turning the vision into something real.



Spotlight: Gateley

A phased strategy for 100 percent adoption

Gateley /

With 15 years of documents spread across 26 databases, the volume and distribution of Gateley's data hampered searches, impacting knowledge workers and creating extra work for the IT team.

"With our on-premises system approaching end of life, the time was right to look at improving the user experience and business outcomes by moving document management to the cloud," said Amy Fletcher, Senior Business Analyst at Gateley.

After deciding iManage was the best provider for their needs, Gateley consolidated 77 million documents in the cloud, applying [iManage Security Policy Manager](#) to fix permissions before migration rather than carry old problems forward. Three weeks after go-live, 100 percent of the group's 1,000-plus legal professionals were using [iManage Work 10 in the Cloud](#) daily.

"This is a strategic milestone for us: we've set the bar for the future and will continue working on improving how people save, share, and collaborate on documents," Fletcher said.

Read the full [Gateley](#) customer story



First, your people

Create excitement, find your advocates, and build momentum from within.



Best practice

Connect knowledge sharing to business outcomes people care about.

Save talk about metadata, file structures, agentic AI, and access management for a different audience. Communicate in plain terms how better knowledge management produces better business results — and support it with numbers from the maturity index and benchmark data we share in the next section.



Best practice

Build a culture that learns from employee expertise.

Identify and develop knowledge champions. Celebrate any new best practice an employee brings forward. Run cross-team initiatives that mix up expertise and perspective.

When people understand that their knowledge and experience are genuinely valued — not only as tools for efficiency but as differentiators for the business — they become more than just users, they become advocates

The support and enablement program from iManage has been excellent — they've helped us track value, collect feedback, and build internal champions to drive real business impact. [View press release](#)

Kirk Scruggs, CIO, Bracewell LLP



Then, your process

Give employees the policies and procedures they need to succeed consistently. This includes making sure AI guardrails are built within your workflows to ensure consistent compliance. To be effective for AI agents, rules must be much more explicit and granular than they need to be for humans.



Best practice

Make access management as frictionless as possible.

Security, compliance, and access management are among the most cited barriers to knowledge sharing. Alongside intelligent access management tools, make sure employee training and documentation address the questions and frustrations that slow people down.



Best practice

Document your knowledge capture and storage policies clearly.

From which metadata to add when saving a document, to when to revisit and update information — make the rules clear, concise, and easy to follow. But be careful not to make policies so restrictive that employees are tempted to save work on personal devices to avoid the friction. Even agents can be driven to take workarounds to achieve a goal if sufficiently challenged.



AI enablement in connection with our data in iManage is a strategic priority for us. It's going to accelerate our knowledge access and insights. [Full story here](#)

Ava Moussavi, Head of Legal Operations and Tech,
GvW Graf von Westphalen

Next, your technology

Provide the platforms and tools needed to share, access, and activate collective knowledge.



Best practice

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

Your knowledge platform should serve as a governed system of action, connecting knowledge, context, and workflows in one place. The right platform creates a trusted foundation for collaboration and decision-making. It also empowers AI and agents to securely discover information, detect changes, execute workflows, and generate auditable outcomes.

Choose a platform that:

- Employees can access anywhere, any time — with mobility that fits how people work
- Has intelligent tools for improved discoverability, document processing, security, and access management
- Is modular and can be tailored to different teams without fragmenting into separate systems
- Can scale with growing volumes of knowledge and an expanding range of formats and devices



Best practice

Plan for AI that doesn't just find your knowledge, it acts on it.

AI can do more than make knowledge easier to find. The most advanced organizations are using AI to detect change across documents, regulations, contracts, policies, and matters. An agent can then act on what it finds, running the necessary workflows and returning structured output that the next person or agent can use. Every step is logged. Teams focus their expertise on judgment rather than manually identifying differences.

Look for a platform where AI can reason over your governed knowledge base and surface what is relevant before anyone has to ask. Your team can review and approve rather than starting from scratch. None of that works on content the platform cannot interpret. Work captured in context — the right matter, the right metadata, the right relationships among documents, people, and decisions — is what the platform can read and understand, place within a matter,

and make immediately useful. Beyond record-keeping, every document filed strengthens the foundation, and every decision captured in context makes the next similar decision faster and more grounded.

As AI takes on more of the work, governance has to extend to what AI is permitted to do, not just what it is permitted to access. That means choosing a platform with AI built in responsibly: one where access controls, information barriers, and audit trails hold, within the platform, regardless of which AI tool sits on top.

On the [iManage platform](#), AI Enrichment turns unstructured data into AI-ready knowledge that is findable, actionable, and reusable without requiring manual effort. Planning for a governed intelligence layer now means you are not starting a new governance project every time you adopt a new AI tool, and the organizations building that habit today are the ones whose AI answers will be worth acting on.



Best practice

Build for an agentic future.

Enable AI to reason from the same governed knowledge, whether it is native to your platform or brought in from outside. Look for an open architecture (such as MCP) that enables AI tools to connect to your knowledge without creating a separate data or governance layer. Ensure that access controls, information barriers, and traceability are maintained. iManage Context Fabric™ now delivers this as a governed intelligence layer that unifies, enriches, and connects an organization's knowledge so agents can reason and act on it safely, under human control, in iManage and in any AI tool.

Finally, iterate and optimize

Knowledge maturity is not a project with an end date.

Keep learning from employees, partners, vendors, and peers in the industry. Best practices, rules, and technology will keep evolving — and your knowledge strategies will need to move with them. Above all, keep listening, keep iterating, and keep improving.





Spotlight: Schwabe

Pairing change management and governance for the win



Todd Fleischmann was familiar with the risks of running law firm data on premises when he joined Schwabe, Williamson & Wyatt.

"If all your content is on premises and somebody gets into your environment, they get the keys to the kingdom," said Fleischmann, CIO at Schwabe. **"The firm's reputation is vastly more important than a few hundred dollars here or there."**

Building on Schwabe's move to [iManage Work 10 in the Cloud](#), Fleischmann brought a change management approach designed for attorneys rather than IT: pre-launch training, a 2.5-day open support bridge after go-live, and ongoing spot training on search and email filing. [iManage Security Policy Manager](#) now serves as what Fleischmann calls "the authoritative location of all data governance," enforcing ethical walls consistently across the firm.

The result: about 90 percent adoption across Schwabe's 375 professionals, from the accounting team to the CEO. Fleischmann is now building toward the firm's next stage of maturity with an AI-readiness framework using iManage metadata.

"I want to build a governance framework that will allow AI to be deployed responsibly, client-by-client, matter-by-matter, as permissions evolve," he said.

Read the full [Schwabe, Williamson & Wyatt](#) customer story



Takeaway

Turning vision into reality means aligning people, processes, and technology with the specific drivers of knowledge work maturity. Organizations that do this well and follow through gain more than efficiency. They get answers they can trace, people who act on them with confidence, and a foundation where today's work makes tomorrow's work better.

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



Every journey starts with a practical question: how far are we from where we want to be?

Getting there means understanding the landscape first. iManage has developed an in-depth report to help you understand the most important factors in building knowledge maturity – and where your organization sits today.

The results are compelling. Organizations at the highest level of the Knowledge Work Maturity Model™ are nearly twice as likely to report year-over-year revenue growth as those at the lowest level. Meanwhile, 85 percent of organizations are already piloting or implementing artificial intelligence – but only 17 percent have integrated it into daily operations. The gap between ambition and execution is where knowledge maturity makes the difference.

By answering a focused set of questions, you can identify where your organization is already strong, where to focus your effort, and how you compare against similar organizations across your sector.

Visit the [iManage Knowledge Work Maturity Hub](#) to take the free assessment and see where you stand. Download the full [iManage Knowledge Work Benchmark Report 2026](#) for the complete findings.

About iManage

iManage is dedicated to Making Knowledge Work™. Built with more than 30 years of experience serving the world's leading law firms, corporate legal teams, and professional services organizations, iManage gives knowledge workers a governed foundation to capture, manage, and build on the work that drives better decisions. As your strategic 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 4,500 organizations around the world.

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