iManage
Making knowledge work

HARRIS BLACK GOES THE EXTRA MILE TO GIVE CLIENTS A SEAMLESS AND PERSONALIZED EXPERIENCE

Insights are at employees' fingertips after migrating more than a million documents to iManage Cloud

harris black
chartered accountants and advisors

Industry:

- Accounting

Headquarters:

- Brisbane, Australia

iManage footprint:

- iManage Work 10 in the Cloud

Harris Black handles about 2,400 documents and emails every week, comprising massive amounts of sensitive client data. Collaboration — the team's ability to find the right documents in seconds and relay that information from anywhere in real time — is fundamental to building lasting client relationships. Responding quickly to client requests is an absolute necessity. So when concerns about system availability emerged, the growing accountancy (and long-time iManage customer) chose iManage as their partner to move their documents to the cloud.

An independent firm of chartered accountants, Harris Black is based in Brisbane, Australia. The firm provides accounting and advisory services to help businesses and private clients achieve their financial goals. To stay at the forefront of the sector and better serve its customers, Harris Black is a founding member of a national network of affiliate accountants who share their knowledge and expertise.

"We build long-term relationships with clients by being personable and going the extra mile," explains Kimberly Ward, Practice Manager at Harris Black. "That means getting to know them, and being there for them when they need us."

Ward says that giving staff the means to have great relationships with clients comes down to data, and that data is in their documents. Employees need the right insights at their fingertips to give clients a seamless, personalized experience. That's why Harris Black has relied on iManage for its document management since 2008, and why they recently migrated more than a million documents to iManage Work 10 in the Cloud.

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Kimberly Ward, Practice Manager, Harris Black

Business outcomes:

- Automatic updates,
  zero downtime

- Secure document access
  across the globe

- Enhanced collaboration

The business challenge

On-premises technology hits its limitations

One of the drivers behind the move to the cloud was a concern about system availability. "Our workflow is based around iManage," explains Ward. "We must have uninterrupted access, or our entire operation could grind to a halt."

When Harris Black adopted iManage for its document management, the director envisioned it as a solution that would expand as the firm grew. They had run iManage on-premises for well over a decade, and the business continued to prosper. However, after taking on several large clients who expected instant access to their documents, the firm started thinking about an iManage upgrade.

"It was a challenge to schedule maintenance and upgrades because we couldn't afford any downtime," says Ward. "Remote team members are in a different time zone to our office, so there was never a good time to have any systems offline."

Empowering the team to be productive from anywhere

As a long-term advocate of the hybrid workplace, Harris Black staff work remotely two days per week, and employees are always on the go — meeting with clients, commuting to and from the office, or traveling for work. The team of 30 in-house staff is complemented by 14 remote team members, making the ability to access documents securely from anywhere, with the appropriate security and governance measures in place, an absolute necessity.

"Mobility is critical to the firm," says Ward. "With iManage we can collaborate in real time both remotely and in person."

The solution

Baked-in updates, zero disruption

Before the move to iManage Work 10 in the Cloud, the firm had to factor in the potential for interrupted service before implementing updates, which wasn't ideal for their users or their clients. Now all the updates are baked into normal operations, and the team hasn't suffered any downtime at all since the migration, which is a big relief to everyone.

Harris Black spent months planning its cloud migration to reduce the impact on its staff and prevent any disruption in service to clients. They reviewed their folder structure and simplified it as they prepared. The migration took a short six weeks total, culminating in more than a million documents being moved to the iManage Cloud in just a few days.

Post-migration, upgrades happen automatically with zero disruption, and staff benefit from new features with every release. Backups in the cloud are also more secure and available than they were when everything was saved on network drives. And with built-in version control, earlier document versions are always close at hand.

Business outcomes

Enhanced features boost productivity

Harris Black accountants and admin staff work in iManage every day. Around 2,400 documents and emails are stored on the platform every week and the more advanced search capability in Work 10 has been a big hit with the team.

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Kimberly Ward
Practice Manager
Harris Black

"Migrating to iManage Work 10 in the Cloud was by far the most seamless experience we've ever had with a new technology," says Ward. "Our goal was to complete the migration without staff noticing and we achieved that. We ran two training sessions to talk them through new features. Everyone got up to speed quickly and loves the modern interface."

Ward remarks on some of the features that have been popular. "The timeline shows when a document has been edited, so we can keep track of all versions. Accessing documents offline is also really useful when we travel — the latest file automatically uploads as soon as the internet connection is restored."

She said the client experience has improved, as well. The team responds to requests for documents in seconds, a huge win for Harris Black and a significant factor in sustaining its competitive advantage.

Looking ahead

"I'd recommend iManage Work 10 to any accounting firm. It's fast, reliable, and migrating to the cloud was not as scary as we imagined," concludes Ward. "Your teams benefit from the latest features and new releases with no downtime. Advanced indexing makes it easier to find and open documents, and you don't have to be in the office to be productive."

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 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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