

Schwabe, Williamson & Wyatt migrate 40 M documents to iManage

Pacific Northwest law firm achieves 90% platform adoption
and frees attorneys to focus on clients, not filing systems



Schwabe

Industry:

- Legal

Headquarters:

- Pacific Northwest

iManage footprint:

- iManage Work 10 in the Cloud
- iManage Security Policy Manager
- iManage Threat Manager

[Schwabe, Williamson & Wyatt](#), a multi-practice law firm with approximately 375 professionals across 6 offices in the Pacific Northwest and had iManage on premises for years before migrating its trove of 40 million documents and emails to the iManage Cloud. The firm's CIO says the move was a calculated risk reduction rather than a leap of faith, as it consolidates client work, correspondence, and firm knowledge into a single, governable system. On the highly secure iManage Cloud platform, the firm's collective knowledge is accessible to every authorized user, from the accounting team to the CEO, and firm-wide adoption is at about 90 percent.



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Todd Fleischmann, CIO, [Schwabe, Williamson & Wyatt](#)

Partner:



Stone Consulting is a female-owned consulting firm providing white-glove managed services to clients in the legal sector. Its iManage Certified engineers and business analysts design bespoke solutions for law firms of all sizes.

Business outcomes:

- Fragmented to unified
- Knowledge accessible to all
- Trusted data governance
- 90% adoption firm-wide



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The business challenge

When infrastructure becomes an obstacle

Like any self-managed infrastructure, Schwabe was responsible for keeping everything in its on-premises environment online and operational. They managed the updates and maintained a technology stack with real limitations on what it could support. The choice to migrate to iManage Work 10 in the Cloud was driven by a clear-eyed view of where the legal technology landscape was heading and what the firm needed to do to remain competitive. On-premises environments are costly, especially for firms trying to move forward; technical debt tends to surface at the worst possible moments and demands attention before progress can continue.

When attorneys cannot find what they are looking for, they stop looking. The downstream consequences reach well beyond wasted time. Documents go unfiled. Emails go unmemorialized. Knowledge stays locked inside idiosyncratic folder structures that only their creator can navigate, and the firm quietly accumulates a kind of institutional forgetting.

Todd Fleischmann, CIO at Schwabe, knew that story well before he walked through the door. At a previous firm, he managed two entirely separate document management systems, watched attorneys build personal mental maps of document locations because search was unreliable. When he joined Schwabe six months before this story was recorded, their cloud migration was already completed. His job was to build on the foundation in ways that his experience uniquely qualified him to understand and act on.

For firms still operating in such an environment, the risk is not merely operational. "If all your content is on premise and somebody gets into your environment," Fleischmann says, "they get the keys to the kingdom." A single breach could expose client confidential data protected under the ABA's Rule 1.6 — and no incident response plan can fully offset the reputational damage that follows. "The firm's reputation is vastly more important than a few hundred dollars here or there," he concludes.

The solution

From fragmented systems to a unified platform and trusted data governance

Fleischmann joined Schwabe just after they had moved from iManage Work on premises to [iManage Work in the Cloud](#), but it was familiar ground. At his previous firm, he had championed and led a full [iManage Cloud](#) rollout, consolidating two separate document management systems into one, a project and accomplishment he takes pride in. He brought the same approach to Schwabe: clear communication, deliberate preparation, and a change management model built for attorneys, not for IT.

The migration was straightforward in execution, even if the logistics were demanding. Working with [Stone Consulting](#) team — an experienced iManage implementation partner he describes as "fantastic" and "a great fit" — the team trained users ahead of go-live, executed the cutover on a Friday and Saturday, and had the entire firm working in the cloud on Monday morning. The team held an open Zoom support bridge for 2.5 days post-launch to ease the transition. One-on-one desk sessions



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were available for anyone who needed or preferred it, and spot training sessions diving deeper into the email management toolbar, metadata-driven search, and collaborative document workflows continued in the weeks and months that followed.

Together with iManage Work, Schwabe's implementation includes [iManage Security Policy Manager](#), which Fleischmann calls "the authoritative location of all data governance," and [iManage Threat Manager](#), which enables him to monitor usage and uncover unusual user behavior. The platform also integrates with other applications the firm uses daily. Fleischmann believes the fragmented era of disconnected platforms and manual enforcement procedures is over. Matter creation, end-user workflows, and firm-wide data governance now run through a unified system.

"Moving to the iManage Cloud platform means you have fewer systems to manage and reduces the amount of support work," says Fleischmann. "I don't have to worry about hard drives going out at data centers and sending someone on-site to take care of it." Freed from reactive maintenance, IT teams can be both iManage practitioners and support. He says his people often notice friction points other users haven't reported and address them before they compound.

The business outcomes

From fire drills to confidence: results you can stake your reputation on

Attorneys immediately noticed how much easier it was to find things. Once, they had to reconstruct folder paths from memory or navigate a cumbersome filing tree. Now the enhanced search in iManage Cloud transforms the task of retrieving information into something closer to an "Amazon-style" shopping experience. "You just put in a keyword of something you're looking for, something you remember, and use the filtering operations," Fleischmann explains. "Like, oh, I remember this particular word was in a sentence, and I know I filed that email." And, boom, there it is.

He says email filing is one of the most used and appreciated capabilities across the firm. The duplicate-filing indicator signals to an attorney that a shared email has already been captured by a colleague, removing ambiguity and preserving client correspondence. "Knowing that their legal assistant has filed the email, so they know it's memorialized and they don't have to worry about it — that's a valuable feature," Fleischmann says.

Another change is how attorneys relate to a remote work environment, using the cloud-native platform. With the firm on iManage Cloud, attorneys no longer need to depend on a VPN connection to reach client files. Hotel Wi-Fi that blocks VPN traffic, choppy airplane connectivity, international travel ... now none of it obstructs their access to firm content. "I don't need to be on VPN anymore. I just need to have an internet connection, and I'm able to get to the work that I need," Fleischmann says. "It's a huge advantage."

Something attorneys take for granted that can be a headache for a CIO is governance. Ethical walls are now enforced consistently, verifiably, and in real time across the ecosystem through Security Policy Manager. "When something comes through and there's an ethical wall, our matter intake team communicates, there's a



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screening, and I have a dedicated FTE whose main responsibility is to set up the wall within Security Policy Manager,” Fleischmann says. “It’s seamless and straightforward.” Data governance decisions, including which content may be used in AI workflows, are made once, at the policy level, and enforced automatically.

The firm is actively building an AI-readiness framework: iManage metadata allows document-level tagging indicating whether content is approved for AI use, enabling attorney teams to honor client-specific AI permissions without manual tracking.

Nearly all of Schwabe’s 375 professionals have embraced the platform. Adoption sits at roughly 90 percent, from the accounting team to the CEO. “Across the org, we all use iManage,” Fleischmann says, noting that the firm’s decision to remain with iManage through the on-premises-to-cloud transition rather than re-evaluate the market was not passive loyalty. It was a deliberate choice, endorsed and guided by an IT leader who led two previous firms to the iManage Cloud, delivering results he could stake his reputation on.

Looking ahead

Schwabe’s roadmap continues to expand. Fleischmann is preparing to deploy [next-generation co-authoring](#) — a capability that eliminates the need for a single attorney to serve as document keeper during multi-author drafting sessions. “Usually some poor first or second-year associate gets tasked with being the keeper of the document while everyone’s working on their different parts and synthesizing them all into a single spot,” he says. “We don’t need to be doing it that way.” Shareholders at the firm are already excited about the capability, and Fleischmann plans to roll it out very soon.

The firm is proceeding carefully on AI, with iManage metadata tagging documents at the content level in preparation. “I want to build a governance framework that will allow AI to be deployed responsibly,” says Fleischmann, client-by-client, matter-by-matter, as permissions evolve.”

For anyone still weighing the move from legacy infrastructure, Fleischmann advises, “Look for opportunities to relieve pain points. You have technical debt from cobbling together systems, trying to make the best out of what is basically just bad tech. Get rid of that debt. View it as a risk-reduction opportunity related to cybersecurity and inadvertent disclosure of confidential materials. Build your security program and move to a system like iManage that is in the cloud, is secure, and is always available.”

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.