

BURGES SALMON MODERNIZES KNOWLEDGE MANAGEMENT WITH iMANAGE

Realizing clear user benefits by surfacing “gold standard” knowledge through a modern knowledge management system



Industry

- Legal

Headquarters

- Bristol, UK

iManage footprint

- iManage Work 10 in the Cloud
- Knowledge Unlocked (w/iManage Insight)



[Lexsoft](#) provides IT and business process solutions to the legal sector across Europe, the US, and Latin America. The company assists law firms and corporate legal departments to improve their document management, knowledge management, practice management, and CRM processes, to facilitate business efficiency, improve productivity and reduce risk.

Independent UK law firm Burges Salmon has long understood that delivering consistently exceptional results for its clients depends on its legal teams’ ease-of-access to the firm’s preserved and organized collective knowledge. Remote working confirmed increasing requirements for accessibility and an opportunity to update the firm’s 15-year-old system for its knowledge. To achieve a more intuitive, scalable system, Burges Salmon went to iManage for the Knowledge Unlocked solution (including iManage Insight) in tandem with Lexsoft T3. Since implementation through a well-managed, collaborative project that ran to time, scope and budget, Burges Salmon has established an efficient workflow for document submission, and inspired strong adoption and new use case proposals among teams throughout the firm.

Ambitious, sustainable, and inclusive, Burges Salmon focuses on markets and areas where it has extensive knowledge, experience, and expertise, ensuring its clients, people, and communities flourish. Clients trust the firm to achieve “gold-standard” outcomes, helping with everything from everyday legal needs to business-critical issues.



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Carol Aldridge

[Head of Knowledge Management and Information Systems, Burges Salmon](#)

Business outcomes:

- A scalable, future-ready knowledge management system
- Faster, more robust submission process
- More relevant search results, more quickly
- Budget maintained
- Better buy-in, wider use
- Better alignment between KM/Work

The Challenge

An outdated knowledge management system and unwieldy taxonomy

In 2008, Burges Salmon's in-house Knowledge team adopted its first firm-wide knowledge management system (KMS). When the firm went remote during lockdown it became clear that the applications were in need of an update to ensure that they were suitable for supporting legal teams under these circumstances. Certain basic premises remained the same though: A KMS should provide context for each best practice document: why it was drafted a certain way, what the document is good for, and recommendations for how to use it. However, the value proposition falls apart if the user can't even find it.

"It's important for any law firm, whatever the size, to recognize that it's a knowledge-based business. We all have knowledge, and we all want to find that gold standard knowledge and make it accessible for people to reuse. That's where iManage shines," said Carol Aldridge, Head of Knowledge Management and Information Systems at Burges Salmon.

For users and their Professional Support Lawyers (PSLs), submitting and processing new knowledge had become "slow and complex," in large part due to the legacy software. The firm's expert Knowledge team and PSLs had built out extensive taxonomies for their know-how database and precedent database, but these were separate, and the taxonomies were not built to scale. Over time, they had become unnecessarily complex and difficult to navigate, resulting in an unwieldy user experience.

The firm had already moved its document management system (DMS) to iManage Cloud and, to play well with the updated DMS, they also needed a new knowledge system with a cloud-focused roadmap. While revamping the knowledge submission process the Burges Salmon knowledge team wanted to account for existing resources their lawyers used every day, like LexisNexis and Thomson Reuters, as well as the firm's proprietary knowledge content – and to be able to associate additional metadata with internal content. The interface needed to be fast and intuitive to help the firm's PSLs share documents and metadata, including the standard form precedents that they draft and maintain, and the best practice know-how examples contributed by users. The system also needed to be customizable, scalable, and taxonomy-ready to ensure lawyers' searches would yield relevant results quickly.

To achieve these desires, the knowledge solution needed the right combination of tools, but there was work to be done beyond simply replacing the system. Team members from IT and Knowledge combined forces with the PSLs and external consultants to optimize the firm's Knowledge Management function. The aim was to increase the speed, quality, and consistency of the work Burges Salmon's lawyers performed and achieve the highest business outcome of even better client service.

The Solution

Never work on data strategy in isolation

Burges Salmon chose iManage and its partner Lexsoft to implement iManage Knowledge Unlocked knowledge management system (with iManage Insight) and [Lexsoft T3](#), a taxonomy and curation workflow solution. Pairing these two solutions meant that Burges Salmon PSLs would have a robust submission application and process to provide their new or updated assets, while legal teams would be able to search quickly and easily discover curated knowledge resources.



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Louise McNess
Senior Project Manager,
Burges Salmon



But first, they had to build the system, define procedures, then design and roll out the training.

Combining roles across functions was critical to their approach. So Aldridge pulled an expert team together. A project board, partner representative, knowledge team, PSLs, a solution architect, a project manager, and a test manager were all needed to ensure success. A core group of PSLs fronted the key decision-making group and were instrumental in accelerating project delivery timelines. Carlos García-Egocheaga, Lexsoft CEO and Jack Shepherd, principal business consultant for iManage, contributed strategic and technical guidance for their respective platforms. The core group of PSLs continue to have a key business-as-usual role in helping the knowledge team with governance of the taxonomy to ensure that it remains well structured as it evolves.

Louise McNess, a Project Manager for Burges Salmon, stressed that “understanding and embedding strong supplier relationships, holding early strategy sessions, and ensuring the full appreciation and documentation of the key business requirements were vital building blocks to the project’s success.” Following this approach, the team spent just one month on document preparation and less than two weeks on actual configuration and migration.

McNess recommends that project managers taking on a project like this:

- Identify key stakeholders early and monitor their involvement.
- Secure continued business buy-in to ensure project delivery success.
- Assess change impact and devise a robust business change strategy.
- Track and measure the overall user experience and system optimization.

Ensuring a discovery search to use metadata across systems meant going back to the fundamentals. Lexsoft T3 would extend the submission process, granting the capability to add enhanced metadata to documents, including tags, taxonomies, and associated texts in a document profile, enabling highly relevant search results even at a granular level. García-Egocheaga specified that T3 supports many different workflows and can interact with other internal or external web services to acquire information and add it to the document profile. Knowledge Unlocked (with Insight) then reveals the information attached to the document profile. Together, these tools enable lawyers and PSLs to filter and search based on document type, legal topic, department, or sector — a critical requirement of the project.

Because Knowledge Unlocked and T3 are currently stored on premises, a pipeline service from iManage pushes the content and metadata from the documents stored in iManage Cloud to the on-prem iManage index. This includes the document contents, default iManage DMS metadata, additional metadata, and taxonomies achievable with Knowledge Unlocked. The enriched document data goes well beyond simply matching a search term: it also identifies the relevant area of the business and recent review data, providing greater context to lawyers and PSLs.



Aldridge observes that the firm's document and knowledge systems perform different jobs. "In the DMS you have everything," she says. "But, as well as precedents, every firm has examples of work product that they're especially proud of, that they'd give to a colleague or new hire to use as a starting point. The idea is to crystallize this know-how and add it to the knowledge management system in its very best state. Using the new system, our lawyers can start from the best work the firm has done." In the end, that's a large part of what good knowledge management is all about.

Business Outcomes

More value, adoption, and future-readiness than ever

Project leads for this initiative agree the system has been well-received and users are finding it highly intuitive. PSLs are enabled with a state-of-the-art submission process reflecting the needs across the business, and practices have discovered huge value in having relevant, connected data like Thomson Reuters and Lexis just a click away. Because so many teams contributed to this effort, there is more buy-in and better use of Knowledge Unlocked with Insight than the old system. Aldridge says partners who don't have PSLs have started asking how they can use Knowledge Unlocked in their areas – the best sign of success that a knowledge leader can hope for.

"You don't need a battalion of PSLs to manage a knowledge management system," says Aldridge. "Any firm with a structure around knowledge or a document management system can find a way to surface their best material. It's not about how large your KM team is, it is about how well you engage with your professionals."

Looking Ahead

Thanks to this project, Burges Salmon's board sees technology as a clear business enabler and knowledge as a necessary business tool. There is talk about connecting finance and fixed-fee billing to get more value than ever out of their knowledge management system.

"This has been a fantastic project delivery initiative to be involved in, and we were in incredibly safe hands with iManage and Lexsoft," lauds McNess.

About iManage™

Dedicated to Making Knowledge Work™, iManage provides an intelligent, cloud-native, secure knowledge work platform that enables organizations to uncover and activate the knowledge that exists inside their business content and communications. Advanced AI and powerful document and email management create connections across data, systems, and people while leveraging the context of content to fuel deep insights, business decisions, and collaboration. Underpinned by best-of-breed security workflows and governance, iManage has become the industry standard – continually innovating to solve complex professional challenges and enabling better business outcomes for more than a million professionals across 80+ countries. Visit www.imanage.com to learn more.