

# Farella Braun + Martel makes the employee and client experience seamless with iManage

Midsize law firm modernizes document management for hybrid workforce and views iManage AI as a key differentiator

**Industry:**

- Legal

**Headquarters:**

- San Francisco, US

**iManage footprint:**

- iManage Work 10 in the Cloud
- iManage Share
- iManage Threat Manager
- iManage Security Policy Manager
- iManage Conflicts Manager
- iManage Records Manager

**About Stone Consulting:**

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.

Farella Braun + Martel is a hybrid workplace where legal and support staff need a highly available, reliable, and secure document repository. For 25 years, that secure, reliable document management system has been iManage.

When the firm migrated to iManage Cloud, its trusted, secure repository became available anywhere, anytime, on any device. While their users became fast fans of iManage Work 10, the technology team began rolling out several more iManage solutions to fulfill its vision of providing a comprehensive knowledge work platform. Employees can now deliver an even faster, more seamless client experience built on 60 years of expertise and three decades of iManage.

Farella Braun + Martel is a leading Northern California law firm headquartered in San Francisco. They represent corporate and private clients across a range of commercial and civil practice areas and have a dedicated office in Napa Valley. Farella Braun + Martel have been practicing for more than 60 years and currently employ 250 people.

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**Jordon Flato**

Director of Technology, Farella Braun + Martel



#### Business outcomes:

- Increases productivity
- Enhances security and compliance
- Speeds up onboarding
- Safeguards system availability



iManage is the bedrock of everything we do: it's mission-critical. Our staff work in iManage more than any other application.

#### Jordon Flato

Director of Technology  
Farella Braun + Martel

## The business challenge

### Securing the hybrid workplace and making work more efficient

As a hybrid workplace, the staff at Farella Braun + Martel have the option to work either remotely or in the office. Attorneys working with co-counsel on contracts do a great deal of collaborating. The IT team is responsible for securing the work environment for everyone and making sure the right documents are readily accessible to all who need them.

"We're a midsize firm delivering big firm performance. Technology plays a huge role in helping our staff be productive. My team is responsible for access control and system availability," explains Jordon Flato, Director of Technology at Farella Braun + Martel.

When the firm was running iManage on premises, it involved quite a bit of manual work for the IT team. The team facilitated file sharing between the firm and clients and used a dedicated third-party product to create and enforce data security policies, for example. These tasks were time-consuming, didn't make the best use of the team's skillsets, and it wasn't optimal for the firm.

"Running on-premises infrastructure felt like having all our eggs in one basket," said Flato. "We migrated to the cloud to protect our environment from outages, increase security, and take advantage of the latest efficiency-boosting technologies."

Upgrading to current, more efficient versions of iManage solutions enabled employees to get work done faster and the firm to be more effective. People in updated roles had new responsibilities. Secretaries at Farella Braun + Martel, for example, now support a wider pool of attorneys than in years past. Faster processes help them save time on administrative tasks like filing, and more advanced search capabilities enable them to fill information requests quickly.



## The solution

### A comprehensive cloud-native knowledge work platform

Over the years, as Farella Braun + Martel's needs evolved, iManage stayed in step with those changes — such as moving the platform to the cloud to achieve greater accessibility and to Microsoft Azure to ensure tighter integration of critical technologies.

"iManage is the only platform for us. We've seen it grow and mature over the years, actively invested in delivering a better core product for the legal sector," Flato recalls. "iManage is the bedrock of everything we do: it's mission-critical. Our staff work in iManage Work more than any other application."



iManage has a great user experience and a whole suite of products to address specific challenges. Employees can complete more tasks themselves without waiting for help from the IT team.

**Jordon Flato**  
Director of Technology  
Farella Braun + Martel

The firm turned to implementation partner, [Stone Consulting](#) for support in its cloud migration. Together, they implemented [iManage Work 10](#) in the [Cloud](#) and [iManage Share](#) along with [iManage Records Manager](#) to keep digital and paper records organized, [iManage Threat Manager](#) to provide activity alerts and usage reporting, and [iManage Conflicts Manager](#) to help with onboarding new clients. These solutions comprise a robust knowledge work platform for the entire firm.

“Stone Consulting is a top-class partner to work with. The team knows iManage inside-out and delivers exactly the right level of support for our firm,” says Flato. “A lot of partners don’t want to work on small engagements, but Stone Consulting gave us concise and tailored support when we needed it.”

Stone’s support gave Flato’s IT team the confidence they needed to roll out a suite of new solutions and securely move about 20 million documents.

### **How staff benefit from the new interface and solutions**

After many years of using DeskSite, a legacy iManage product, some people at Farella Braun + Martel were reluctant to use the new Work 10 interface. The firm accommodated them by keeping both versions available until users were comfortable with the change.

“The cloud version of iManage is superior to working on premises. We integrated it with Microsoft Office and other products our staff use frequently, such as Litera and Tungsten Automation Power PDF. This has streamlined and enhanced the user experience,” says Flato.

User adoption increased as employees experienced the benefits of iManage Work 10 in the Cloud firsthand, and today Flato is pleased to report that 100 percent of staff are using the latest version of iManage. Everyone from managers and support staff to legal workers and the IT team are dedicated users; anyone who needs to create or access a document does so in iManage.

They also enjoy faster, more powerful searches and easier email filing. With iManage Share, they can distribute documents to clients quickly and easily without waiting for the IT team to help.

Meanwhile, iManage Threat Manager helps the team monitor user behavior. It automatically generates alerts when any irregular behavior occurs and pulls periodic reports for partners who need to verify their group associates are complying with document management policies. If the firm is audited, all the data is readily available to demonstrate compliance.

The department that onboards new clients uses iManage Conflicts Manager to speed up the process, which can otherwise be burdensome. Conflicts Manager makes conflicts checking between attorneys, new clients, and previous clients fast and easy so the firm can ensure that new matters are allocated to the most appropriate legal team.



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**Jordon Flato**  
Director of Technology  
Farella Braun + Martel

## The business outcomes

### Continuous improvement in efficiency and satisfaction

Since moving iManage to the cloud, Farella Braun + Martel's 250 employees are more efficient than ever. Less time spent on admin means more time to focus on higher value and more satisfying tasks.

"iManage is baked into our firm now; I can't imagine a world without it," says Flato.

"iManage never rests on its laurels, it's always iterating and evolving to help lawyers work more efficiently. That's how we know it's the right partner for us."

The iManage Cloud platform has a wealth of features to increase productivity and address pain points. For example, the iManage Work 10 search tool is much faster and more responsive. Hearing this from colleagues encouraged more staff to use the new interface and helped expedite user adoption.

"iManage has a great user experience and a whole suite of products to address specific challenges. Employees can complete more tasks themselves without waiting for help from the IT team," says Flato, adding: "We used to have to build indexes manually, but that's automated now. My team is happy to be outsourcing more of the day-to-day maintenance to iManage."

Flato says he sleeps better at night knowing iManage Threat Manager keeps client data as secure as possible. A potential cyberattack or data leak would cause significant damage to any organization's reputation, but with Threat Manager, the firm knows they'll be alerted to any anomalous activity so they can act quickly to protect their sensitive data.

"We're super happy with iManage. We can carefully manage our files, comply with regulations and audits, and we know our data is secure and highly available to the right people," adds Flato.





## Looking ahead

Flato's team is working with Stone Consulting to implement [iManage Security Policy Manager](#), which will simplify setting up ethical walls and replace a legacy solution.

Farella Braun + Martel is also excited to roll out [Microsoft integrations](#) such as co-authoring in iManage, and to use the AI tools in (Microsoft) Copilot and [Ask iManage](#).

"AI and iManage will be a game changer. We've got millions of documents, so Ask iManage will help us find what we're looking for quickly with natural language queries," Flato explains. "Ask iManage means we can tap into firm knowledge without necessarily knowing which document we're looking for. That opens infinite pathways for us to leverage historical knowledge to better serve our clients."

As pioneers of productivity, Farella Braun + Martel are exploring more iManage services. They're taking part in a pilot to improve training, support, and onboarding, and are also members of the Early Adopter Program. The team looks forward to exploring [iManage Mailbox Assistant](#), which uses AI to intelligently identify where email and attachments should be stored. This saves valuable time, helps establish definitive single sources of truth, and strengthens information governance efforts.

"We've always given clients a seamless experience working with iManage. As we explore the possibilities of using AI together with iManage, we see an opportunity to really differentiate ourselves and offer clients a dramatically better experience," Flato concludes.

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### 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](http://www.imanage.com) to learn more.