

Gentry Locke boasts 100% adoption and a foundation built for AI

Virginia law firm builds on two decades of iManage, with more mobilized attorneys and higher client confidence



Industry:

- Legal

Headquarters:

- Virginia, US

iManage footprint:

- iManage Work 10 in the Cloud
- iManage Share
- iManage Mobility
- iManage Security Policy Manager
- iManage Threat Manager
- iManage Tracker

Gentry Locke began its relationship with iManage 20 years ago when the firm left Worldox. The firm's Director of Information Technology was on board for all but the first three of those years, navigating every transition with the firm and the iManage platform. Cloud migration was the most consequential of these, involving nine months of planning and six months of execution, along with a head-to-head competitive evaluation and a complete rethinking of document access and client trust. After opening a fourth office in a new commercial market and walking into the firm's first-ever client audits fully prepared, they can confirm that the accessibility, visibility, and credibility they've gained, along with a more capable platform, has been well worth the effort.



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Debbie Johnson, Director of Information Technology, Gentry Locke

Business outcomes:

- Accessible, more capable platform
- Visibility and reporting
- Portability and accountability
- Enhanced client credibility



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Debbie Johnson,
Director of Information
Technology,
Gentry Locke

The business challenge

Security posture for the next chapter

For most of the past two decades, Gentry Locke operated with iManage on premises, and the platform served the firm well. But as the firm grew and its commercial client base expanded, leadership recognized the need to adopt a more sophisticated approach to security and governance. Cybersecurity insurance requirements were becoming more specific, and client due diligence questionnaires more detailed. Commercial clients were starting to ask for precise, documented answers to the question of who had access to their data.

"We are a mid-sized law firm," Debbie Johnson, Director of Information Technology, Gentry Locke, explains, "and the cloud offered a level of security that we couldn't provide in-house. We wanted that enhanced security for our client documents." The firm knew where it needed to go, but after nearly 20 years with iManage, they wanted to be certain it was still the right choice for the firm's migration to cloud, and for the firm's future expansion. That called for a serious evaluation of the alternatives. So, Gentry Locke got to work.

The solution

The path to cloud-based governance

Over nine months, Gentry Locke compared iManage, NetDocuments, and several smaller vendors in a deliberate, feature-by-feature evaluation. The candidates were broadly comparable from a user perspective. The differences that mattered were on the back end.

"The back end was dramatically different," says Johnson. "We found significantly more security, a lot more portability, accountability, ethical wall requirements, and reporting for our clients in [iManage Cloud](#) that we didn't find in NetDocuments and the other products."

The firm's history with iManage also carried weight. Even through changes in ownership and successive platform generations, the support relationship had remained one of the firm's strongest vendor experiences. "The trust we built in a long-term relationship had a big impact on our final choice," Johnson says.

The migration took six months to execute. The starting point was governance: [iManage Security Policy Manager](#) replaced the firm's longstanding open-access model with needs-based, practice-group-structured permissions. Client data was contained. Ethical walls gained the audit trail they had previously lacked.

The transition landed better than expected. "Security Policy Manager was a very easy adoption," Johnson says. "Once we explained exactly how it worked, and that they had access to request anything they really needed, it was so easy to open that up. It also gave us insight into ethical walls that we didn't have before on premises."



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Visibility came with it. [iManage Threat Manager](#) gave the firm its first real view into document movement across the organization, who accessed what, when, and whether anything looked out of place. "The reporting has been really good for us," Johnson says. "It's a lot more insight into how our documents are moving than we had before, especially compared to on premises, where we had nothing."

The capabilities that followed addressed the daily friction attorneys had lived with for years. [iManage Share](#) ended the cumbersome process of password-protecting large documents, emailing them, and then sending the password separately. Documents stay governed in the cloud environment; clients follow a single link. If a last-minute change is made before the client opens it, they see the updated version automatically, no resending, no confusion.

For the practice group pods that rely on coordinated work across attorneys, paralegals, and legal assistants, [iManage Tracker](#) provides shared matter-level task lists that keep assignments visible and progress trackable. And when [iManage Mobility](#) launched for the firm's attorneys, the response was immediate. "It was like a gift," Johnson recalls. "We could do it anywhere."

The business outcomes

New confidence opens new doors

At 100 percent, iManage adoption reflects the firm's inbox discipline, onboarding processes, and access to a far more capable platform than the on-prem system they moved from. Features like search speed, document preview, and filter functionality also contribute to that stellar number.

The security posture Gentry Locke built during migration proved its value almost immediately. "We were able to answer those client questionnaires in a much more authentic, honest, and detailed way than we'd ever been able to before," Johnson says. "Shortly after we moved to the iManage Cloud, we had our first-ever client security audits, insurance companies and commercial clients who had grown more demanding about data governance. We were able to tick a bunch of boxes that didn't exist for us before, but suddenly we were prepared. Had we remained on prem, we wouldn't have been."

Gentry Locke also opened its fourth office after moving to [iManage Work in the Cloud](#), entering a market that was new to them — larger commercial businesses with higher security expectations. The ability to communicate specifically and credibly how client data is governed and who has access to it helped the firm pursue work it could not have approached with the same confidence before.

Looking ahead

"Anything we use for AI has to keep our data, our intellectual property, our client information inside the data environment we already have locked down, one that honors our security permissions and iManage Security Policy Manager. That is not a preference. It is a requirement, or it's unlikely to get much traction at our firm," says Johnson.

Johnson expects to pitch [Ask iManage](#) to firm leadership soon. She already knows how she's going to sell it. "Partners buy products," she asserts. "So, we have to show the time saving and the value-add for them, and that's where we're going to get it."



It was like a gift. Anything they didn't like before became instantly okay when they found out they could do it anywhere with iManage Mobility.

Debbie Johnson,
Director of Information
Technology,
Gentry Locke



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.