

# KLINEDINST ATTORNEYS MIGRATE DOCUMENT MANAGEMENT TO THE CLOUD WITH IMANAGE

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San Diego law firm use Work 10 in the Cloud to optimize access, improve collaboration and future-proof operations



**Industry:**

- Legal

**Headquarters:**

- California, USA

**iManage Footprint:**

- iManage Work 10 in the Cloud

**Business Challenges:**

- Accelerate cloud strategy
- Migrate to a stable, robust environment
- Meet security requirements
- Embrace new ways of working

Founded in San Diego in 1983, Klinedinst Attorneys are the go-to law firm for clients across California, Washington, Arizona, and Nevada. Their team of more than 85 litigators, trial attorneys, and transactional lawyers rely on fast access to relevant data to provide high-quality guidance and counsel to private clients and businesses.

To future-proof their document management strategy, the firm decided to migrate to a secure, reliable cloud solution. “We wanted to achieve greater stability, mobility, and improve co-authoring to help employees collaborate better,” recalls Joseph Escobio, CIO at Klinedinst.

To undergo such a substantial change to the environment, the team needed to get buy-in for the migration. They did due diligence to assess internal systems and scope out the pre-requisites. Klinedinst also engaged a third-party partner to vet document management solutions to make sure the chosen platform would meet their security requirements.



With iManage Work 10 in the Cloud, we’re working faster, collaborating better, and delivering better client services.

**Joseph Escobio**  
CIO, Klinedinst Attorneys

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## Business Outcomes:

- Fast access to secure documents from anywhere
- Future-proofed environment
- Improved efficiency
- Simplified collaboration
- Increased billable hours

## Learn from your peers

Having built a solid business case, the Board of Directors was convinced that moving to the cloud was the best approach for the firm. In May 2019, the team kicked off their cloud migration, going live with iManage Work 10 in the Cloud just three months later.

“Reach out to your peers before any big transformation. You can talk to CIOs across the world who have similar challenges and requirements, and find out how they solved those problems,” advises Escobio. “We learned it’s more important to set attainable milestones to keep momentum than to try and get everything perfect first time.”

The firm also worked with a systems integrator to bring additional expertise to the project.

## Provide comprehensive training

The implementation was a roaring success. Klinedinst provided thorough training to streamline user adoption, with the goal of teaching employees to feel confident enough to be self-sufficient on the platform.

“Consistency is key when it comes to training. It’s important to remember that what’s intuitive for the tech team might not be intuitive for lawyers. Don’t just show them once and expect them to love the platform — set metrics for user adoption and help them get there,” Escobio adds. “We have a dedicated team member on site who knows enough about workflows and technology to help lawyers if they get stuck.”

When lawyers realized how much easier life is with iManage, adoption started to take off. Popular functionality includes being able to track documents, which helps attorneys create a timeline of their work, and how easy it is to navigate in the solution. Attorneys also enjoy greater accessibility, particularly being able to access documents securely from anywhere.

“Employee feedback has been amazing. The mobile app is so convenient — people don’t want to pull out their laptop when they’re out or at home, but they’re clocking up extra billable hours by completing small tasks from their smartphone when they’re not at their desks,” says Escobio.

Next on the agenda, the team is planning to integrate Microsoft Teams and other heavily used applications to give attorneys a centralized digital workspace.

“With iManage, we’re working faster, collaborating better, and we can give clients a quick summary of their case by looking in one system,” Escobio concludes.

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## About iManage™

iManage is the company dedicated to Making Knowledge Work™. Its intelligent, cloud-enabled, secure knowledge work platform enables organizations to uncover and activate the knowledge that exists inside their business content and communications. Advanced Artificial Intelligence and powerful document and email management create connections across data, systems, and people while leveraging the context of organizational content to fuel deep insights, informed business decisions, and collaboration. Underpinned by best of breed security, sophisticated workflows and governance approaches, iManage has earned its place as the industry standard through continually innovating to solve the most complex professional challenges and enabling better business outcomes for over one million professionals across 65+ countries. Visit [www.imanage.com](http://www.imanage.com) to learn more.