

# 2024 ESG Report



**iManage**

Making knowledge work

# Contents

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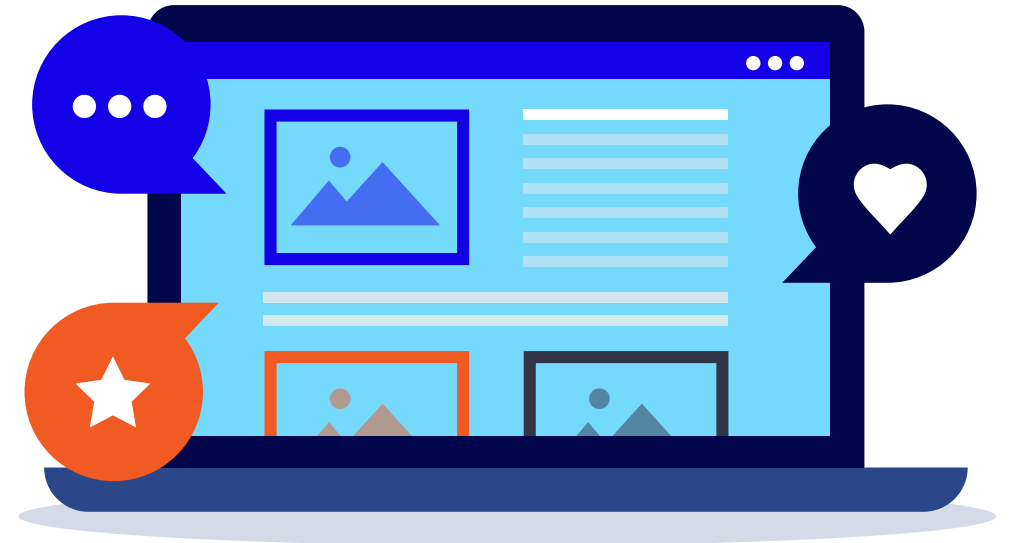
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## About this report

Welcome to the iManage 2024 Environmental, Social, and Governance (ESG) Report. This year's report provides updates on our ESG priorities, strategies, and commitments. Unless otherwise noted, the ESG efforts and data disclosed within this report pertain to calendar year 2023 and cover 100% of iManage global operations. If you have any questions or feedback regarding iManage ESG efforts, please contact us at [ESG@imanager.com](mailto:ESG@imanager.com)

## Forward-looking statements

This report includes estimates, projections, and other "forward-looking statements." Forward-looking statements are based on current expectations and assumptions that are subject to risks and uncertainties that may cause actual results to differ materially. We undertake no obligation to update or revise publicly any forward-looking statements, whether because of new information, future events, or otherwise.

# CEO message

## To our stakeholders:

I am pleased to introduce the iManage 2024 ESG Report. This report comes at a time of growth and change within our company and, more broadly, across the knowledge economy. In April 2023, we announced a strategic investment from Bain Capital, reflecting our firms' mutual belief in the organic growth potential for iManage and the market demand for our cloud-native, AI-enabled platform. With Bain's support, we are expanding our presence in diverse knowledge work industries and helping our customers scale, accelerate, and maximize the impact of their work.

As our company evolves, we recognize the need to be thoughtful and conscientious in all aspects of our business. Our ESG efforts reflect our aspirations to grow with intentionality; to uphold our company values, to meet our stakeholders' expectations, and to remain committed to the purpose of Making Knowledge Work®.

In this report, you will see that we have strengthened our sustainability posture on multiple fronts:

- **Our workforce has surpassed 1,000 employees, globally:** This milestone comes amidst broad improvements to our talent strategy and the highest employee engagement score we've ever achieved.
- **We published our first-ever DE&I Vision and Strategy:** This **report** affirms our commitment to building and upholding a workplace and company culture where all can thrive.
- **We've committed to offsetting our greenhouse gas (GHG) emissions:** Having completed our most recent GHG inventory, we're taking proactive steps to reduce our environmental impact.
- **We launched iManage AI:** Artificial intelligence is at the heart of the iManage growth strategy, and we believe that the responsible implementation of AI is technology's most critical obligation to society.

I hope you find this year's ESG Report informative and insightful, and I appreciate the ongoing partnership of all our stakeholders.

Respectfully,



**Neil Araujo**  
CEO and co-founder  
iManage



# Who we are

## Our mission

We are dedicated to Making Knowledge Work® by providing the knowledge economy with cloud-native solutions that empower organizations to work more productively, collaboratively, and securely.

## Our core values



### Respect for people

We treat each other, customers, and partners like we would expect to be treated. Empathy and appreciation for diversity of backgrounds is paramount.



### Customers matter most

If the customer succeeds, then the company succeeds. We strive to know, understand, and appreciate our end users alongside delivering outcomes.



### Hunger for learning

Learning requires the humility to acknowledge our own limitations so we can interactively explore, experiment, and simply get better at what we do.



### Taking ownership

Our colleagues can be trusted to execute precisely, exercise sound judgment, meet commitments, ask for help, and communicate clearly.



### Courage and commitment

Protecting and building our culture is the job of every single employee. We encourage people to speak up and hold each other accountable.

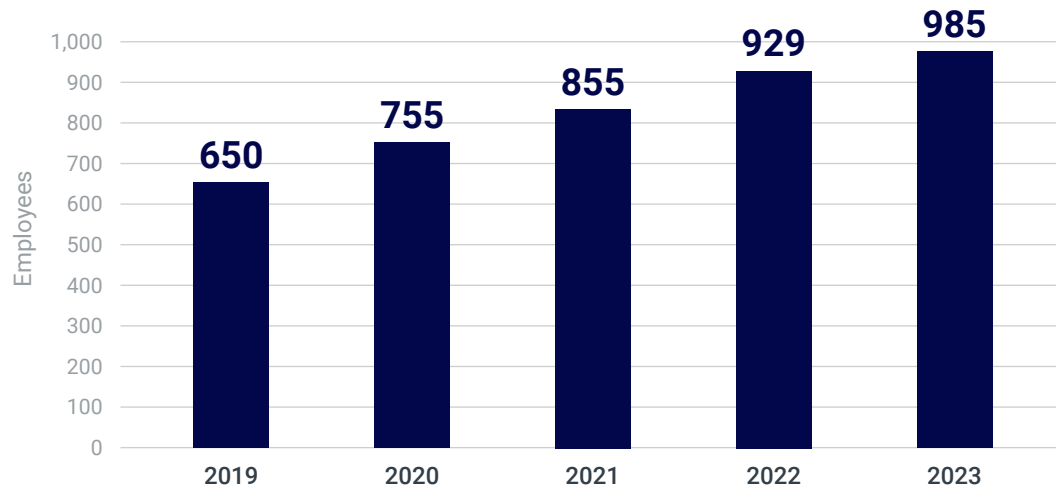


# Our business at a glance

Headquartered in Chicago, iManage has development and support centers in the US, UK, Canada, India, and Australia and serves customers in more than 70 countries.

Built on nearly 30 years of experience, iManage helps leading organizations manage documents and messages more efficiently, protect vital information assets, and leverage knowledge to drive better business outcomes. We employ award-winning AI-enabled technology, an extensive partner ecosystem, and a customer-centric approach to provide support and guidance you can trust. iManage is relied on by more than one million professionals at 4,000+ organizations around the world.

## Global workforce

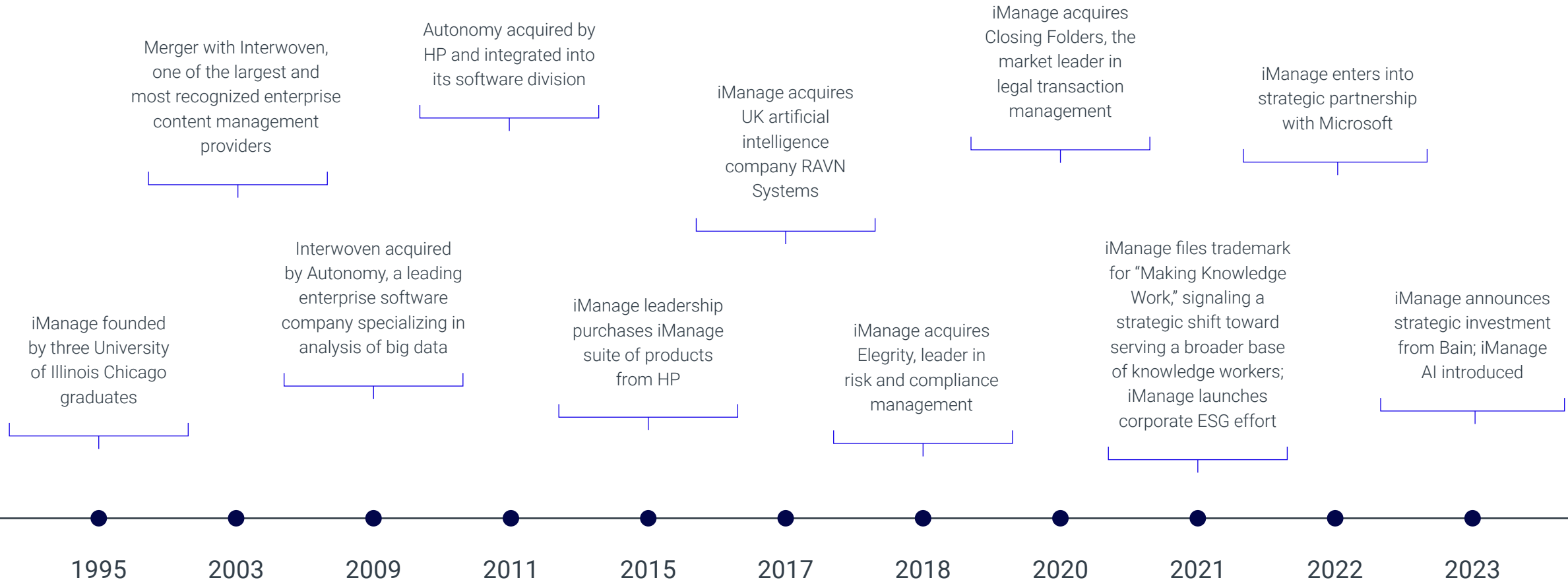


**8**  
Office  
locations

**5**  
Development and  
support centers

**70+**  
Countries where  
customers are served

# Company timeline



# How we serve the knowledge economy

In 2019, the Brookings Institute estimated that the collective knowledge of the US population, at the time, was worth “ ... approximately \$240 trillion, far exceeding the value of other inputs to economic growth.” As knowledge industries continue to accelerate and diversify, we now know that the knowledge economy has grown to represent over 1 billion knowledge workers, globally, and is served by a knowledge management market valued at nearly \$400 billion.

Our industry is in the midst of radical growth and profound change driven by a confluence of economic, social, and technological trends. These include:

## Data proliferation

The amount of data our customers maintain is doubling every 3–5 years. Not only are organizations generating and storing much larger volumes of information, they’re also managing a greater variety of data types including documents, emails, voice memos, video files, and more. Their ability to extract knowledge efficiently and securely from these data requires increasingly sophisticated and seamless knowledge management solutions.

## Institutional knowledge loss

The US Census estimates that every day, until 2030, 100,000 Baby Boomers in the US will reach age 65 – a milestone that many associate with retirement. Each retiring Boomer will take with them 30–40 years of professional expertise and institutional knowledge. Capturing, preserving, and transferring that knowledge to tomorrow’s workforce is critically important to our customers.

## Changing work preferences

As new generations enter the workforce, employers have the opportunity to harness their unprecedented technological proficiencies and diversity of thought. This means meeting them where they are, literally and figuratively. Many young professionals now consider remote or hybrid work a given, and they expect to be equipped with cutting edge technologies to enable productivity and collaboration from anywhere.

## The rise of AI

As society adapts to the growing role of AI in everyday life, knowledge industries seek to understand the tangible business and social value they can generate from the use of advanced AI models. Within this societal and economic context, iManage remains positioned at the center of the knowledge economy. We offer end-to-end knowledge management solutions, enabling our customers to find, analyze, secure, and govern their unique institutional knowledge.



# Industries we serve

- Legal
- Financial Services
- Accounting
- Healthcare
- Media & Entertainment
- Insurance
- Federal, state, and local government institutions
- Other knowledge-centric industries

# Solutions we offer

- Document & Email Management: Effective email and document security software
- Risk & Compliance: Risk mitigation, compliance assurance, and enhanced transparency
- Knowledge & Search: Tools to unlock your organization's institutional knowledge
- Legal Transaction Management: Simplified legal transaction management
- Task & Workflow Management: Improved movement of knowledge work
- The iManage Platform: Activating knowledge in business content and communications



**iManage is a minority-owned supplier certified by the National Minority Supplier Development Council**





## Spotlight

# The responsible use of artificial intelligence



Many would argue that 2023 was the year that AI truly became a topic of household conversation around the world, with both optimism and concern running high. At iManage, we are no strangers to the promise or the risk of artificial intelligence and have utilized various forms of machine learning, neurolinguistic programming, and AI in our solutions since 2017.

Today, AI is natively integrated into the iManage Cloud Platform, enabling our customers to:

- Automatically analyze and extract key data points from documents, allowing users to find responses that are relevant, accurate, and built on the best work products available at their organizations
- Analyze user behaviors and patterns to automate necessary but tedious tasks such as filing emails in the proper folders and ensuring inbox filings are accurate, up-to-date, and compliant
- Automate critical knowledge preservation by analyzing, assessing, and automatically applying metadata to the content created within existing workflows, making work

products accessible to others, and ensuring institutional knowledge is leveraged across organizations

- Augment knowledge work by using curated data sets to yield the best results while reducing “hallucinations” through adherence to ethical walls and content security parameters

iManage AI includes tools to control the AI engine’s access to content based on ethical walls and organization obligations, reducing the risk of breaching client confidentiality. The AI engine analyzes documents in the customer’s own data resource, ensuring confidentiality and compliance with ethical and regulatory obligations.

As increasingly powerful generative AI models become available, we are taking proactive steps to ensure that our tools provide customers with new capabilities in the realms of accountability, transparency, fairness, safety, and inclusiveness, while meeting their ongoing data security, privacy, reliability, and confidentiality needs.

# 2023 business highlights

## Strategic Investment by Bain Capital

In April of 2023, iManage announced a strategic growth investment from Bain to accelerate our organic growth and the continued evolution of our cloud-based, AI-enabled knowledge work platform.

The investment represents a minority, non-controlling stake in our business, intended to scale and accelerate our vision to redefine the modern workplace.

## Launch of the iManage Knowledge Work Maturity Model™

In May of 2023, we published our [Knowledge Work Maturity Model](#) report – the culmination of four years of research into the key stages of development within knowledge work industries and the best practices that organizations can adopt along their journeys. This work is meant to serve as a benchmark for our industry and to provide guidance and inspiration for organizations seeking to advance their knowledge work capabilities.

## Introduction of iManage AI

In August of 2023, we introduced iManage AI, a powerful new AI engine built into the fabric of the iManage cloud platform leveraging Zero Touch, Zero Trust, and data domicile security principles. iManage is actively working with customers as part of our Early Access Program to validate the results they see with generative AI, and to ensure the approach includes the right security and governance protections.

# Awards and recognition



Crain's Chicago Business Best Place to Work 2023



Built In Best Places to work San Francisco, Built In, 2023



Built In Best Places to work Chicago, Built In, 2023



2023 Women Impact Tech 100



EcoVadis Bronze Medal 2023

# iManage global momentum



## Company

**24%**

Growth YoY

**1,000+**

Employees  
Worldwide

**Majority**

Management  
owned



## Customers

**4,100+**

Total customers

**1M+**

Users worldwide

**85%**

of the Global 100

**80%**

of the AmLaw200

**4 of 5**

Banking and Financial  
Service Centers

**100+**

Major Film  
Studios

**40%**

of the Fortune 100

**All 4**

of the Big Four  
Accounting Firms

**100+**

Federal, State, &  
Local Governments



## Cloud

**35%**

Growth YoY

**2,600+**

Cloud customers;  
500,000+ cloud users

**99%**

Retention  
rate

# iManage ESG priorities

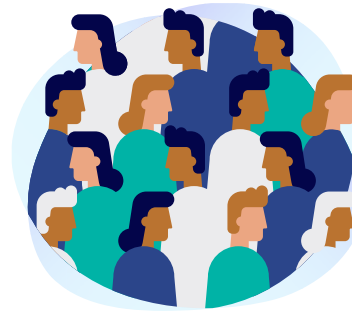
At iManage, our ESG efforts are overseen by an ESG Committee comprising our Chief Financial Officer, Chief People Officer, and General Counsel who meet quarterly to evaluate the company's ESG-related progress, obligations, and risks. This committee provides ESG briefings to the iManage Board of Directors, which was formed in 2023 upon the strategic investment made by Bain.

In 2022, we disclosed the results of a comprehensive ESG priorities assessment that iManage undertook to understand our stakeholders' concerns and potential expectations of iManage with respect to ESG and sustainable business practices. We are committed to advancing our progress and transparency in the priority areas that we identified, while continuing to proactively engage with our stakeholders on these topics.



## Environmental

- Climate change
- Energy conservation
- Waste
- Water



## Social

- Diversity, equity, and inclusion
- Talent management
- Human rights
- Community engagement
- Health & safety
- Worker wellbeing
- Education



## Governance

- Privacy
- Data security
- Ethical business



# How we engage our stakeholders

As our business evolves, so do our stakeholder relationships. We seek to maintain open lines of communication with key stakeholder groups whose viewpoints may inform our ESG-related practices, policies, and disclosures.

## Employees

- 1:1 check-ins with managers
- Team meetings
- Quarterly all-hands meetings with opportunities to submit questions in advance
- In-person “fireside chats” with rotating members of iManage executive leadership
- Internal communications and newsletters
- Companywide employee engagement surveys
- iMhome employee intranet
- Regional and companywide volunteerism and charitable giving opportunities
- iMpace Communities (Employee Resource Groups)
- Confidential hotline for reporting ethical concerns

## Customers

- Account check-ins
- Feedback solicitation within iManage applications and via follow-up surveys
- Product advisory boards, user groups, and empathy sessions
- Research collaboration (e.g., via Knowledge Work Maturity Model)
- Product pilot testing
- Thought leadership, blog posts and social media content
- ESG reporting
- Annual EcoVadis survey submission

## Investors

- Board meetings with Bain representatives
- Participation in yearly, Bain-sponsored forums tailored to executive and functional leaders (e.g., CEO, CFO, GC, etc.)
- Direct access to Bain’s head of security for periodic consultation

## Regulators

- Bimonthly meetings with the iManage external Data Privacy Office, serving as our liaison to advisory authorities

## Vendors and suppliers

- New vendor onboarding meetings
- Annual check-ins at the time of contract renewals
- Modern slavery risk assessment of iManage supply chain

## Industry groups

- Industry association membership
- Participation in industry forums and conferences
- Signatory to industry commitments (e.g., Greener Litigation Pledge)

## Communities

- Meetings with nonprofit partners
- Community days of service
- Educational and training opportunities for aspiring professionals in local communities

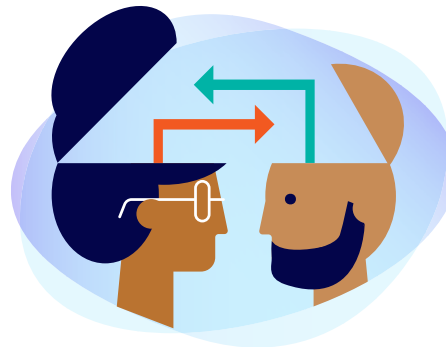
# Talent strategy and philosophy

iManage is home to an exceptionally talented workforce from a spectrum of technical, creative, and administrative backgrounds. We strive to be a workplace where we empower each employee to apply their skills in the most meaningful and impactful ways – just as we do with our own customers. To achieve this, we've oriented our talent strategy and philosophy around three core principles:



## Balance

We recognize that performance doesn't exist in a vacuum. Our culture is one that promotes wellness and provides support without hesitation or judgment. We believe that our employees' health and happiness in their personal lives provides a foundation for success in their careers.



## Core competency

While each of our employees has some form of specialized expertise, we believe those skills are best applied when teams have certain shared values and competencies. Empathy, emotional intelligence, and critical thinking are all examples of foundational skills that we actively cultivate and nurture to improve collaboration, and to maintain humanity in our highly tech-centric industry. Furthermore, we recognize employees' demonstration of our [Company Values](#) through performance reviews, our iThrive career framework, and through on-the-job feedback.



## Career evolution

An iManage career does not necessarily follow a linear or hierarchical pathway. Our company culture strongly promotes ongoing learning and development, and our career framework and rotational opportunities allow employees to experience a variety of challenges and disciplines that suit their aspirations as they grow and thrive in their roles.

# 2023 workforce highlights and targets

## iManager training expansion

2023 was the first full year that our flagship manager enablement program was in force. Building upon the foundation established when the multidimensional program was launched in 2022, we introduced our iManager 101 workshop series for all new managers who came into a people leader roll in 2023, either through promotion or being hired directly.

## Introduction of iMAway

Based on engagement survey feedback, focus groups and benchmarking against comparable companies, iManage launched a best-in-class flexible time off policy in January of 2023 that meets the diverse needs of our global employee base, empowers our employees to be owners of their work/life balance, and builds upon a foundation of trust and respect.

## Introduction of iBelong

As part of our DE&I strategy, iBelong is an initiative launched in 2023 to improve the sense of belonging that our employees experience both as individuals and members of the iManage community. iBelong provides employees with routine practices, engaging activities, and the safe spaces needed to make real connections with colleagues across the globe.



# How we work

## Making it mean something

Our mission is to redefine the modern workplace. This is an objective we work towards every day with our customers, but also one that is manifest within our own community. We believe in creating a culture that is transparent, purposeful, inclusive, authentic, and where our employees' curiosity, integrity, and ambitions are rewarded.

Achieving this vision requires us to understand and thoughtfully shape each aspect of the employee experience at iManage — from prospective employees' earliest interactions with iManage recruiters, through their career growth and development, to their ongoing connection with us as alumni or retirees.

Drawing upon nearly 30 years of experience managing exceptional talent, we encourage and empower every one of our employees to Make It Mean Something™ in their work. This concept represents a North Star for our people leaders and leadership team and is made possible through the training programs, benefits, and development opportunities that exist for our employees at each stage of their career at iManage.

### How our employees Make It Mean Something™



Challenging the status quo and innovating with the brightest teams using sophisticated technology



Influencing the way the global knowledge economy gets work done



Achieving personal growth in a supportive environment that acknowledges individuals' contributions and builds consistent recognition into employees' everyday work experience



Expressing individuality, authenticity, and personal needs to maintain the right balance day-to-day at iManage



Building connections in an inclusive environment and generating positive change in the larger iManage community



Tapping into our multifaceted career framework and manager enablement programs to follow desired career paths

### Support we provide

- Cutting-edge workplace technologies
- Leadership and growth opportunities
- Strategic planning participation

- Longstanding company reputation
- Diverse and esteemed customers
- Sustainability efforts

- Comprehensive benefits
- Financial wellness
- Rewards and recognition

- Time off
- Flexibility
- Supportive leave program

- iMPact Communities
- Connections with a global community
- Company events

- iThrive career framework
- Dedicated learning and development team
- Rotational opportunities



# Listening to our employees

We take pride in maintaining an open and transparent culture in which our employees can share feedback in ongoing ways, through formal and informal channels. In 2022, we conducted a companywide employee experience survey and took actions in 2023 to address the feedback we received.

The survey evaluated our employees' sentiment across eight assessment themes, including:

- My iManage experience
- Leadership & communication
- Create positive work environment
- Drive results
- Build teams
- Make decisions
- Coach, develop, empower
- Leadership Net Promoter Score (NPS)

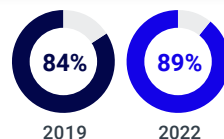
The survey yielded an 82.5 percent participation rate (726 out of 880 eligible employees), and we received 1,762 written comments in response to four open ended questions.

## iManage 2022 Employee Experience Survey highlights

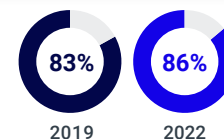
Our 2022 employee experience survey was focused on employee satisfaction and manager effectiveness, with specific questions related to how our employees are engaging with their managers and how those working relationships could be improved. The survey results showed notable progress in each of the top-level favorability ratings that we've tracked in recent years.

### Statements

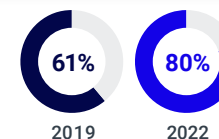
"I would recommend iManage as a great place to work"



"I am empowered to develop new and better ways of doing things"



"My manager provides me with opportunities for growth and development"



The survey also yielded suggestions for improvements that could be made to the employee experience at iManage. That feedback, and the subsequent action we've taken, includes:

### 2022 improvement feedback areas

### 2023 actions taken

Time off policies need updating and clarification

iManage introduced a flexible and comprehensive leave policy as part of the iMAway program.

Cross-departmental communication and alignment could be strengthened

iManage revamped its OKR (Objectives and Key Results) planning process to foster better cross-departmental alignment in the months preceding each new fiscal year.

The pace of change at iManage calls for more leadership touchpoints to help articulate the company's strategic direction to all employees

iManage increased communication through multiple channels. As an example, we hosted a series of in-person "fireside chats" with members of the leadership team who visited each iManage location across the globe to field direct questions from employees and discuss regional, departmental, and function-specific themes.

# Employee development

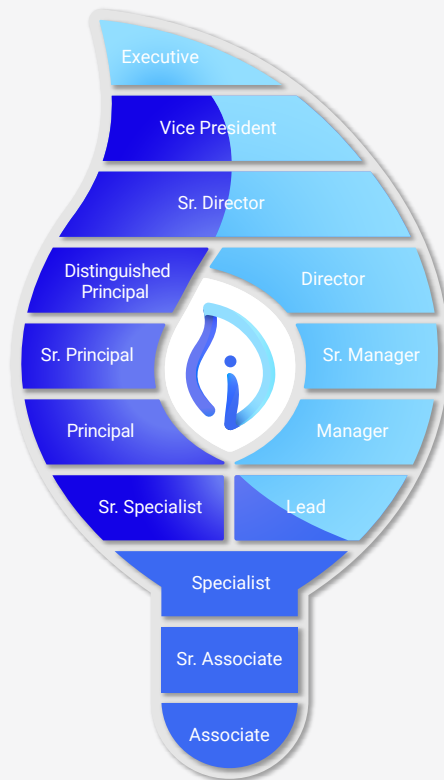
Our business exists to foster the creation, dissemination, and preservation of knowledge. Within our own workforce, this means:

- Identifying the most promising talent, wherever it exists
- Empowering employees to reach their highest potential
- Tapping senior leaders and experts to impart their wisdom to our organization

In 2020, we introduced iThrive, our career framework, to give clarity and substance to the employee journeys that are possible at iManage. Since then, we've increased employee engagement with the model by introducing an iThrive Basics learning module, utilizing the framework in conjunction with employee performance reviews, and standardizing the key competencies upon which all employees – and candidates for hire – are evaluated as they progress through iThrive Job Tiers and Career Streams.

Since the introduction of iThrive, we have already seen an increase in employee retention – which stood at 92.72 percent in 2023 – and looking ahead, we expect the model to further support new and internal hiring, promotions, and employee retention as our business grows.

## iThrive Career Framework



### Job Tiers

Hierarchical position of jobs based on incremental changes in responsibilities and scope

### Career Streams

Career types within the organization, characterized by different job focus, responsibilities and skills needed to achieve success

Individual Contributor

People Leader

# Key training programs and resources

## iManager

A comprehensive manager enablement program that equips our managers to support their team members more effectively throughout their entire career life cycles. iManager tools and trainings are tailored to the responsibilities that managers face at specific times of year while also helping them prepare for more sensitive and nuanced conversations that may arise.

Some iManager themes include:

- Effective onboarding
- Leading with empathy
- Creating positive work environments
- Promoting diversity, equity, inclusion, and belonging
- Supporting effective employee development

iManager is designed as a multidimensional, multi-channel program that incorporates hands-on, face-to-face trainings for all managers as well as virtual sessions, eLearning courses, videos, a dedicated Slack channel, and our new iManager Podcast series that features conversations with seasoned managers, offering insights and best practices in specific skill areas. 100 percent of our people leaders completed the iManager program in 2023.

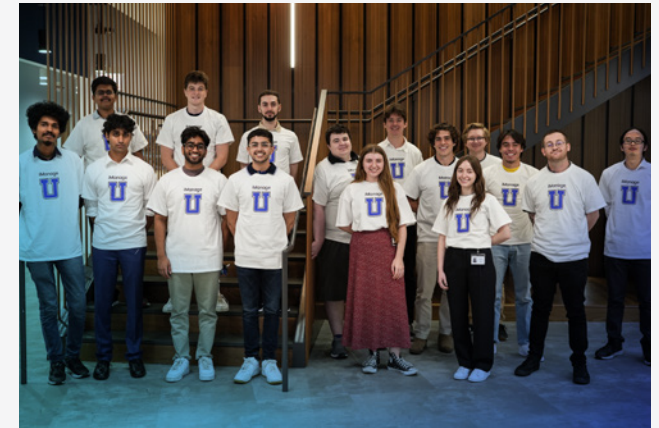
## iManage U

Our global internship program, iManage U, provides students the chance to experience a dynamic, rapid growth technology company firsthand. The program delivers project-based activities, improved knowledge of business fundamentals, complex problem solving, collaboration, team building, and engaging social events.

Goals of the iManage U Program:

- **iM Making an Impact:** Leave your mark on your team by owning and completing assigned projects
- **iM a Mentee:** Learn from teammates across departments and gain perspectives from a diversity of people
- **iM a Connector:** Meet and connect with as many interns and iManage employees as possible
- **iM Inspired:** Learn from our leadership team and ask questions during our lunch and learns
- **iM Social:** Enjoy social events, and everything iManage has to offer throughout the summer

Throughout the summer of 2023, we hosted 21 college students in our Chicago office for our 10-week iManage U program, with internship opportunities across our Engineering, Sales, Design, and Customer Support teams. We are pleased that seven interns from our 2023 iManage U class have converted into full time roles for 2024.



## LawWithoutWalls

Each year, a cohort of iManage employees travel to the EMEA region to participate in **LawWithoutWalls** (LWOW) – “An experiential learning community that leverages intergenerational, cross-cultural, multidisciplinary collaboration to create innovations in the business of law and, importantly, change the mindsets, skillsets, and behaviors of legal professionals.” Participants in the annual LWOW “Sprint” series collaborate in teams over the course of three days, using human-centered design principles to rapidly develop projects addressing business and social challenges in the legal industry.

In 2023, iManage employees participated in two LWOW Sprint teams that received Audience Awards for their innovations. The teams’ two projects that resulted from the LWOW design process included:

### LWOW Project 1

#### Bestie – “Asking for a friend”

Bestie is a trainee’s virtual desktop companion that uses AI chatbot capabilities to instantly provide resources, information, answers and the direction new hires need so that they can work competently and confidently when they are “asking for a friend.”

### LWOW Project 2

#### Loopa – “Be at the office ... without being at the office”

Loopa is a virtual office experience for Gen Z entering hybrid workplaces that allows young professionals to access instant and frequent feedback, mentorship opportunities, and engage in the types of organic conversations that strengthen bonds, encourage the exchange of knowledge, and facilitate professional development to combat a culture of disconnection.

## Rotational Program

Designed to provide our employees with internal mobility opportunities, the iManage Rotational Program is a development exchange through which qualifying employees transfer to different iManage departments or international locations to expand and diversify their skill sets. While some participants use rotations to grow within their existing roles, others use the opportunity to make temporary and permanent career shifts while staying within the iManage family.



**iManage provided me with the incredible opportunity to travel to Australia and collaborate with our colleagues in Perth and Sydney. It was an amazing experience to build relationships with people I don't work with every day. This trip allowed me to explore another part of the world, which I might not have had the chance to do otherwise. Most importantly, it deepened my appreciation for the work we do, globally, and strengthened my relationships with our iManage colleagues and partners in Australia.**



**Riley Phipps**

Manager of Customer Success Engineering  
2023 Rotational Program Participant



## Spotlight

# Employees of the year

One of our time-honored traditions is an annual recognition of employees who have excelled in their disciplines over the course of the year. We present peer nominated awards in 10 categories as well as an overall Employee of the Year award for two employees who have made particularly distinguished achievements. In 2023, we were pleased to name two Employees of the Year for living the iManage values, embracing learning and change, going above and beyond their duties, and consistently creating meaningful impact for iManage and its customers. Out of 860 nominations, the 2023 award recipients were:

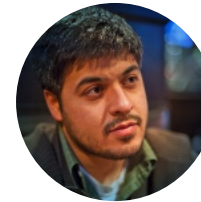


**Tyler Oldenburg**

Senior Technical Support Manager

### Feedback from Tyler's award nomination:

"He is relentless in his pursuit of improving uptime for all customers. Tracking and pushing mean-time-to-recover (MTTR) improvements from 189 minutes in 2021 to 37 minutes in the second half of 2023. His keen attention to detail and proactive approach allowed him to identify and rectify potential problems that, if left unnoticed, could have led to severe system outages. His collaborative and innovative approach exemplifies the true spirit of teamwork."



**Dr. Milad Fatenejad**

Senior Principal Cloud Architect

### Feedback from Milad's award nomination:

"His foresight and technical expertise led to the development of an innovative analytics platform that has revolutionized our data-driven decision-making and system monitoring. He has broken down barriers and worked as part of a cross-functional team with support, accounting, and other groups to democratize the data that was previously locked out of reach in our global architecture."

# Benefits

iManage offers a comprehensive suite of benefits to support our employees' health and wellness, family lives, financial objectives, and charitable interests.

Updates to our benefits in 2023 included:

## **iMAway:**

Launched in January 2023 in response to employee feedback received the year prior, iMAway is a best-in-class flexible time off policy that meets the diverse needs of our global employee base, treats our people like owners, and builds upon a foundation of trust and respect. As part of the iMAway rollout:

- All iManage parental leave policies have been updated to be gender agnostic and now provide coverage for bereavement and loss of pregnancy.
- Vacation and sick days shifted from an accrued time off model to a flexible time off model and now offer equitable time off across all iManage international operations.

## **Expanded mental health resources and wellness efforts:**

In 2023, iManage expanded its Employee Assistance Program (EAP), equipping employees with a suite of coach-guided resources to help them reduce stress, improve mental fitness, and increase personal resilience. Available programming includes:

- In-person or virtual counseling sessions for employees and their household members
- Online coaching to promote the development of new mental fitness skills
- Work-life services to help employees balance their responsibilities with family, caregiving, health and wellness, emotional well-being, and daily living

## Resources provided through the iManage Employee Assistance Program



### **Health**

- Healthy living
- Stress management
- Mental health
- Diet and fitness
- Overall wellness
- COVID-19 resources



### **Family**

- Parenting support
- Adoption assistance
- Child and elder care
- Learning programs
- Special needs help
- Senior housing options



### **Financial**

- Legal issues
- Will preparation
- Taxes and debt
- ID theft services
- Financial planning tools and assistance
- Retirement planning

# Diversity, equity, and inclusion

iManage is in the midst of a concerted, multi-year effort to transform our company's DE&I strategy and profile. While our company culture and values have always reflected the importance of DE&I to iManage, we began a journey in 2020 to formalize our DE&I objectives, step up our workforce engagement, and significantly raise the bar toward the industry leadership to which we aspire.

## The iManage DE&I journey

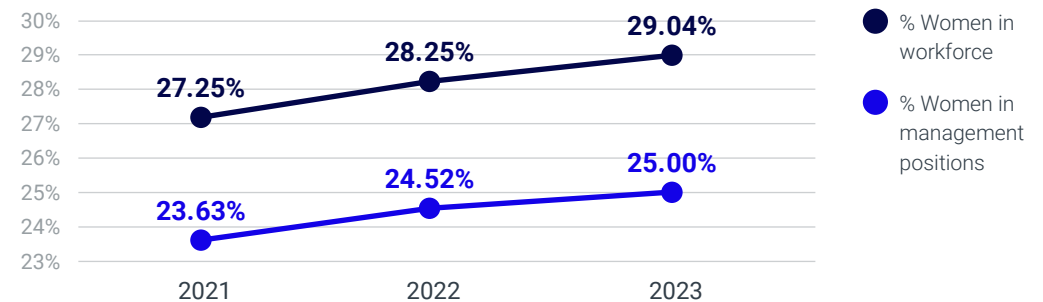
- **2020 - Foundation of iImpact Communities:** A diverse set of employee resource groups comprising iManage employees united by a shared experience, identity, or passion, formed to make a difference in our company and the community at large
- **2021 - DE&I Current State Assessment:** A third-party evaluation of the state of DE&I at iManage that solicited feedback from all populations within the iManage employee base through detailed surveys, 1:1 interviews, and interactive virtual sessions. This assessment culminated in a multi-year roadmap of DE&I opportunities for the company
- **2022 - Publication of the iManage DE&I Vision & Strategy:** A dedicated report reflecting the iManage DE&I journey, challenges, accomplishments, and forward-looking commitments
- **2023 - iBelong and iImpact Community Expansion:** Introduction of iBelong, a new DE&I initiative focused on building a sense of belonging and inclusion where employees can safely share their personal stories; Development of iBrainy, a neurodiversity community that seeks to connect, support, empower, and advocate for neurodiverse individuals at iManage and beyond

To reinforce our DE&I Vision and Strategy, all iManage employees complete annual compliance training exploring their roles in promoting DE&I. We've also launched several thematic employee and leadership awareness trainings related to DE&I topics. Our top 50 company leaders have participated in an intensive DE&I Leadership Immersion Workshop focused on inclusive behaviors, while managers have completed a "Building a People First Culture" training module, promoting empathetic leadership and DE&I sensitivity. Additionally, we've introduced "Implicit Bias" and "Being an Upstander" trainings for all iManage employees.

We have also made policy and procedural changes within our organization, such as:

- A review of company policies to ensure they are equitable, inclusive, and tailored to various intersections of identity
- An evaluation of iManage job descriptions and postings to reduce gender bias and ensure they are intentionally inclusive
- Enhancement of Global Parental Leave options to support the diverse needs of different families

## Female representation at iManage






# Our employee resource groups and guidelines

Newly introduced in 2023, iBelong is our overarching approach to ensuring that employees feel a sense of belonging at iManage. A combination of activities, resources, and guidelines for managers, iBelong allows our team members to share the intangible aspects of their identities, experiences, and lives, creating opportunities to relate to one another in new ways and build inclusion into every interaction.

Our iImpact Communities uphold the values of iBelong; cultivating authentic inclusion and advocating for our employees to feel empowered to bring every aspect of their identity, life experience and/or affinity with a cause into their work.



iImpact Community	Group Vision
	<ul style="list-style-type: none"><li>• To foster a culture of inspiration, support, and empowerment by encouraging women to “just be you”</li><li>• Through internal engagement activities, mentorship, external partnerships, and ongoing recruitment efforts, iMWomen seeks to make iManage a place where women can be their most authentic selves</li></ul>
	<ul style="list-style-type: none"><li>• To be the catalyst that increases the presence of Black employees in the iManage workforce and cultivates a network of support for new and current employees</li></ul>
	<ul style="list-style-type: none"><li>• To cultivate a welcoming and celebratory environment for our LGBTQ+ community at iManage, while providing our members and allies with the resources and education to promote positive change on a global company scale</li></ul>
	<ul style="list-style-type: none"><li>• To give back to the communities in which we operate, tirelessly working to close the opportunity gap to ensure equitable access to education, professional development, and supporting resources</li></ul>
	<ul style="list-style-type: none"><li>• To create an inclusive, understanding, and empowering community that values the strengths of neurodiverse employees and enables them to work and play at an equitable level as their peers</li><li>• To build a collaborative environment where neurodiverse individuals and allies work together to advocate for positive change, awareness, and acceptance in all communities</li></ul>

# Social impact

We proudly dedicate our time, resources, and expertise to causes that are relevant to our business, our workforce, and the communities in which we operate. We are particularly inspired by opportunities to utilize our unique technological skills and business acumen to create positive social impact.

iManage charitable, philanthropic, and volunteer efforts are a blend of corporate-sponsored initiatives and regional efforts administered through iMCaring — one of our employee-led iMPact Communities dedicated to social impact activities around the world. Our employees may use flexible time off each year for volunteering activities, without impacting their vacation time. While our efforts are diverse and ever-changing, iManage has a longstanding commitment to the work of closing opportunity gaps, and many of our social impact efforts reflect this theme.

“

**The importance of giving back to the communities in which we live and work is foundational to the core of iManage. We deliver on this commitment in a variety of ways, from large-scale volunteer days organized by local offices, to empowering employees to take paid time away from work to give back to the organization or cause of their choice. Across our global offices, we deliver on our social impact promises through sharing our unique knowledge and resources.**

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Amy Nordness  
Chief People Officer





# 2023 charitable giving highlights

## Natural disaster recovery and humanitarian support

- iManage made a corporate donation to Red Crescent and Doctors Without Borders/Médecins Sans Frontières (MSF) following earthquakes in Turkey and Syria.
- iManage made a corporate donation to Hawaii Community Foundation Maui Strong Fund in response to Maui wildfires.

## Closing opportunity gaps

- Globally, employees challenged themselves to run and walk 5,000 miles – with a \$1 matching corporate donation from iManage for each mile logged – in support of World Education, a nonprofit dedicated to providing equitable access to education. World Education provides programming for individuals with disabilities, those in rural communities, women, immigrants and refugees, and adults in need of foundational skills.
- Employees participated in our first global iMCaring Charity Drive – a coordinated effort across our international office locations to donate a variety of goods to charities supporting children in need within the communities we serve.

- In honor of Juneteenth and Pride Month, our iMProud and iMBlack iMPact Communities collaborated to raise company-matched funds for Brave Space Alliance, the first Black-led and trans-led LGBTQ+ Center located in the South Side of Chicago, which provides affirming and culturally competent resources, programming, and services for LGBTQ+ individuals on the South and West sides of the city.
- iManage continued its longstanding financial support of Lumen Vitae – an organization committed to closing the opportunity gap by supporting under-resourced schools in Haiti.
- iManage partnered with Makers Academy and Genesys Works, providing financial contributions and supporting intern placement programs in London and Chicago, respectively. Both organizations target individuals from diverse educational and professional backgrounds who aspire to enter careers in technology, providing hands-on business technology training, mentorships, and internships to help facilitate the pivot.

- Employees from our London office volunteered at Hackney City Farm, a community institution and urban farm that provides workspaces to local charities, supplies fresh produce, and provides children with vocational learning and mentoring opportunities focused on sustainable agriculture. Volunteers tackled the typical tasks of a farm, from painting stables and taming nettle bushes to sprucing up geese pens and mucking out a pigsty.



# Understanding our impact

As the global risks of climate change and environmental degradation come into sharper focus, we remain committed to reducing the impacts of our operations, products, and supply chains.

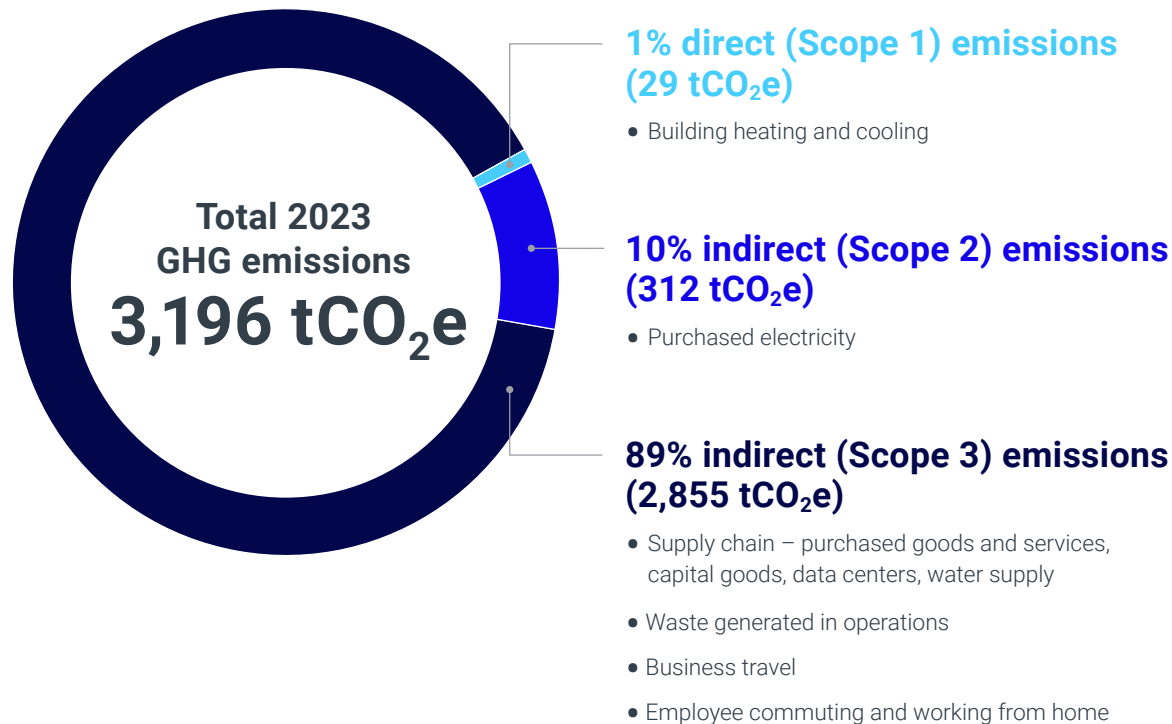
In 2024 we conducted our second company-wide greenhouse gas (GHG) emissions inventory, based on 2023 data, to evaluate the direct and indirect carbon emissions associated with our business activities. The assessment included:

- Scope 1 GHG impacts resulting from natural gas combustion and fugitive refrigerant emissions across our global facilities
- Scope 2 GHG impacts from the purchased electricity used to power our offices
- Scope 3 GHG impacts related to our purchased goods and services, capital goods, data centers, water supply, waste generated in operations, business travel, and employee commuting and working from home

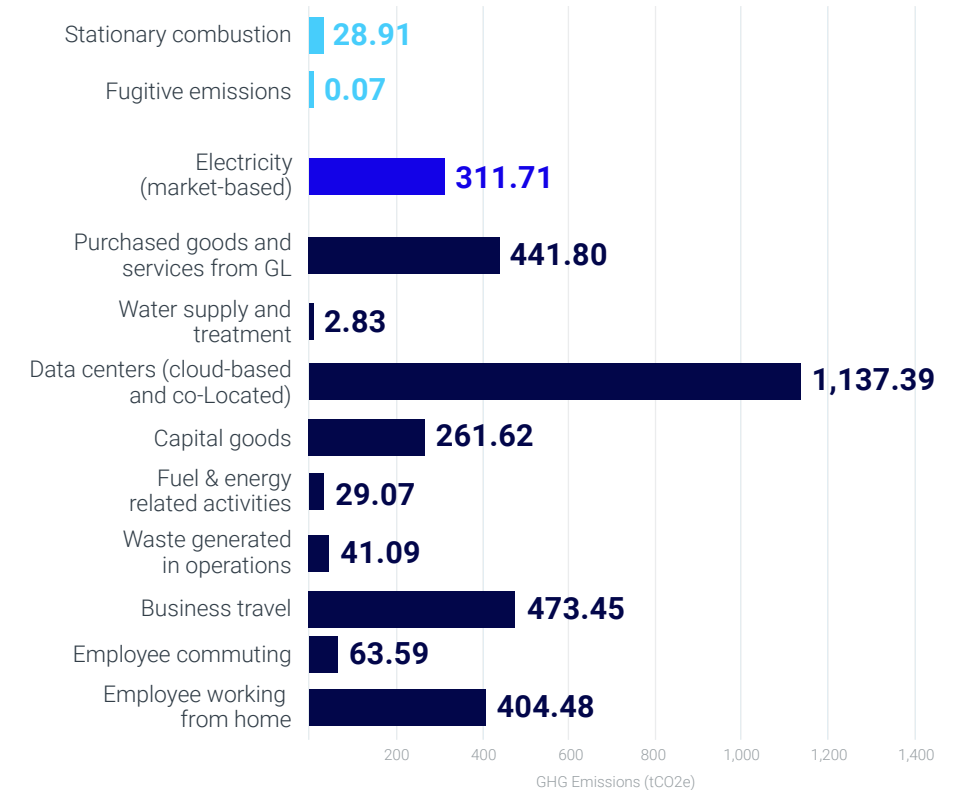


# iManage 2023 greenhouse gas emissions

## Emissions by scope



## Key emissions categories



# Reducing our footprint

In 2023 we made significant improvements to the quality and completeness of the underlying data used to calculate our GHG emissions. This included the addition of two emissions categories – purchased goods and services from our general ledger and employee remote working emissions – and a marked increase in the use of primary and secondary data in our GHG inventory, together representing 85 percent of our total GHG emissions profile.

## Expanding Our environmental efforts

- **Increased use of wind power:** Both our London and Belfast offices now purchase 100% wind-generated power. Together they consumed 523 MWh of electricity in 2023, equal to 43% of our purchased electricity for the year.
- **Green offices:** In 2023, 85% of our leased office space was certified under a green building scheme – an increase from 72% in 2021.
- **Offsetting our emissions:** Upon completion of our 2023 GHG inventory, we made the commitment to neutralize our Scope 1 and Scope 2 emissions from that year through the purchase of high-quality carbon offsets and Green-e® certified renewable energy credits (RECs).

Looking ahead, we are seeking opportunities to achieve further reductions to our gross emissions, particularly within some of our largest emissions categories:

### Data centers

Our usage of data centers represented 36 percent of our companywide emissions in 2023 – the single largest category within our GHG inventory. As we shift more of our customers to the cloud, we expect the carbon intensity of our platforms to decrease, particularly as our virtual data center providers work toward goals of using 100 percent renewable energy. We will also continue engaging with our co-located data center providers to encourage their use of renewable energy and improve the power usage effectiveness (PUE) of their facilities.

### Supply chain emissions

To gain a deeper understanding of the GHG emissions associated with our supply chain, we are seeking more activity-based data related to our key purchased goods and services. This information will help us determine opportunities to make gross emissions reductions within our supply chain.

### Employee commuting and remote work

By 2025, iManage will implement a voluntary employee survey to collect accurate baseline data regarding our employees' commuting distances, number of days worked from home and offices, and modes of transportation. This information will improve our insight into employees' current commuting and working patterns while also helping to gauge their interest in commuting incentive programs that could ultimately reduce our Scope 3 emissions.

### Business travel

For our next GHG emissions inventory, we will be seeking more activity-based data for our company-wide business travel to gain a more precise understanding of our opportunities to reduce travel-related emissions.



# Leadership and corporate governance

iManage is a privately held limited liability company led by Founder and CEO Neil Araujo as part of a 12-member executive leadership team. As of the publication of this report, iManage is overseen by a board of directors, including representatives of Bain.

## Ethical business policies

iManage maintains a variety of policies governing our employees' and suppliers' conduct with respect to ethics and responsible business practices. These include:

Policy/Statement	Key provisions
<b>iManage Code of Conduct</b>	<ul style="list-style-type: none"> <li>• Anti-corruption and bribery</li> <li>• Conflict of interest</li> <li>• Child and forced labor</li> <li>• Diversity, discrimination, and harassment</li> <li>• Equal opportunity</li> <li>• Legal compliance</li> <li>• Whistleblower policies</li> </ul>
<b>Procurement Policy</b>	<ul style="list-style-type: none"> <li>• Fair and ethical supplier relationships and bidding processes</li> <li>• Socially and environmentally responsible procurement of goods and services</li> <li>• Independent, impartial, and transparent procurement decisions</li> <li>• Conflict of interest restrictions</li> <li>• Delegation of financial and signing authority</li> </ul>

Policy/Statement	Key provisions
<b>Third Party Code of Conduct</b>	<ul style="list-style-type: none"> <li>• Compliant trade practices</li> <li>• Business ethics</li> <li>• Human rights and fair labor</li> <li>• Health and safety</li> <li>• Environmental protection and compliance</li> <li>• Information protection</li> <li>• Whistleblowing and non-retaliation</li> </ul>
<b>Living Wage Statement</b>	<ul style="list-style-type: none"> <li>• Commitment to provide employee compensation that meets third-party "living wage" standards for 100% of iManage employees</li> </ul>
<b>Anti-Slavery and Human Trafficking Statement</b>	<ul style="list-style-type: none"> <li>• Prohibition of modern slavery, forced labor, and human trafficking in iManage supply chains</li> </ul>
<b>iManage Community Guidelines</b>	<ul style="list-style-type: none"> <li>• Inclusivity and nondiscrimination guidelines for iManage events and sponsored activities</li> </ul>



iManage employees are required to complete an annual Code of Conduct training to ensure that they maintain up-to-date knowledge of our company policies, follow our procedures, and demonstrate ethical behavior. New hires must complete this training and sign off on their commitment to the Code of Conduct within 30 days of beginning employment, and all iManage employees must reaffirm their adherence to the code annually. A third-party auditor ensures that all iManage employees sign the code, and in 2023, 100 percent of our employees completed their annual Code of Conduct training. Additionally, we provide all iManage employees with a variety of topic-specific e-learning modules each year, such as:

- Information Security and Privacy Awareness
- Business Ethics
- Diversity, Equity, and Inclusion (DE&I)
- Sexual Harassment Prevention

Over the course of 2024, iManage will also begin offering training around AI responsibility. Together, these mandatory trainings ensure that we, as a company, uphold high ethical standards in all aspects of our work.



# Data protection and privacy

iManage takes a proactive, risk-based approach to data security and privacy, with the goal of making continuous improvement through the use of the latest tools and best practices. We serve customers around the world, many of whom are subject to a variety of international data and privacy regulations, including the EU General Data Protection Regulation (GDPR). As such, our systems are designed to allow geographical data residency and segregation, enabling our customers to meet their unique regulatory requirements.



## Oversight of data protection and privacy

### Oversight bodies

- Security Management Review Board (quarterly meetings)
- Data Privacy Steering Committee (2–3 meetings annually)
- Data Protection Officer HewardMills (meetings every two weeks)

### Policies

- Information Security Policy
- Business Continuity Policy
- Responsible Disclosure Policy
- Privacy Notice

### Management System

- iManage Privacy Information Management System (PIMS)

### Certifications

- ISO 27001
- ISO 27017
- ISO 27018
- ISO 27701
- ISO 22301
- SOC 2 Type 2 (All Trust Principles: Security, Availability, Confidentiality, Integrity & Privacy)
- SOC 2+ (includes select NIST 800-171 controls)
- SOC 3
- CSA STAR Level 2 (Gold Level)

Refer to [The iManage Platform – Security](#) for the most current list of certifications

# Data security trends

The knowledge economy, as we know it, could not exist without modern, reliable data security technologies. As a leader in the knowledge management industry, one of our most essential roles is to enable the secure, confidential flow of proprietary data and knowledge. This is becoming a more pointed imperative as the digital threat landscape intensifies and as our customers look to balance their competing needs for data security and accessibility.

iManage has taken a number of proactive steps to counter and anticipate new threats to our internal data networks – which are completely separate from our customer-facing iManage Cloud environments. We have standardized our enterprise threat scanning using an agent-based system that continuously assesses our networks and back office for vulnerabilities and malicious activity, and we utilize an internal “red team” tasked with identifying security threats by simulating attacks on our own systems.

All employee work devices utilize endpoint detection, Malware Free Networks’ threat intelligence service, EFI licenses, EDR for endpoints, and standardized virus and spam protection across all environments to strongly shield against spam and phishing. We also provide updated Security Awareness Training for our employees each year during our Compliance Month to ensure that their knowledge is up to date. Together, these factors have helped us provide employees with a consistent, familiar, and secure experience using the technologies they need to maintain strong data security posture and hygiene in their work – whether in the office or remotely.

## Keeping ahead of the threat landscape

While we are pleased to report that zero major breaches of iManage systems took place in 2023, we, like most companies in our industry, observed and responded to a number of data security threats throughout the year. Some of these threats included:

Data security threat	iManage actions taken
<b>Increased ransomware attacks in the legal industry</b>	<ul style="list-style-type: none"><li>• Reviewed incident response capabilities and assessed operational security resilience through penetration testing</li><li>• Conducted an executive-level incident response tabletop exercise, moderated by outside experts and focused on a hypothetical ransomware attack</li></ul>
<b>Increased phishing attempts</b>	<ul style="list-style-type: none"><li>• Purchased threat intelligence service to provide greater visibility into phishing efforts targeted at iManage employees</li><li>• Conducted an executive-level incident response tabletop exercise, moderated by outside experts and focused on hypothetical phishing attempts of iManage employees</li></ul>
<b>Exploitation of known vulnerabilities</b>	<ul style="list-style-type: none"><li>• Purchased third-party security monitoring services from Security Scorecard and BitSight to help identify known perimeter vulnerabilities needing remediation and to protect us from the exploitation of known vulnerabilities while providing customer transparency around our security posture</li></ul>

# Our continued shift to the cloud

Since 1995, thousands of organizations have licensed and benefited from the industry-leading platform for knowledge work, iManage. Today, as more businesses look to streamline their operations and improve ROI, the iManage Cloud platform provides access to the powerful suite of iManage solutions without the need for on-premises deployment of enterprise software and back-office infrastructure. For many of our customers, this results in levels of service, security, scalability, and performance that are typically available only to large organizations with substantial IT departments.

We believe that our cloud-based offering brings a number of benefits to iManage customers, including:

- Fast, standardized deployment and integration into existing IT infrastructure
- Smoother employee access to iManage solutions across a variety of computing devices and working environments
- Real-time, automatic software enhancements and updates
- Increased data storage and throughput capacity
- Reduced burden on data security teams

As of year-end 2023, more than 59 percent of our customers were accessing our services through the iManage Cloud, and looking ahead we intend to continue on the path toward 100 percent migration.





# iManage ESG data tables

## Workforce data

Description	2021	2022	2023
% employees who received ethics training	100%	100%	100%
# employees (global)	855	929	985
% women in workforce (global)	27.25%	28.96%	29.04%
% Women in management positions (Lead level and above)	23.63%	24.52%	25.00%
# new hires	174	185	134
# promotions	178	156	162
% employees who received a performance review	95%	97%	95%
% employees who would encourage a friend to work at iManage (NPS)	85%	89%	N/A
Nominations for Employee of the Year award	745	1024	860
% retention rate	88.04%	88.57%	92.72%
% employees covered by living wage benchmarking	100%	100%	100%

## Environmental data

Description	2020	2023
Total GHG Emissions (tCO <sub>2</sub> e)	3,349	3,196
Scope 1 Emissions (tCO <sub>2</sub> e)	65	29
Scope 1 % of total emissions	2%	1%
Scope 2 Emissions (tCO <sub>2</sub> e)		
Market-based	802.09	311.71
Location-based	809.72	420.01
Scope 2% of total emissions (market-based)	24%	10%
Scope 3 Emissions (tCO <sub>2</sub> e)	2,482	2,855
Scope 3% of total emissions	74%	89%
GHG intensity (tCO <sub>2</sub> e per employee)	4.44*	3.24
% offices with green building certifications	72%	85%
% paper recycling in US offices	100%	100%
% electronics recycling, globally	100%	100%
Electricity used (mWh)	1,723	1,216
Renewable electricity used (mWh)	315.79	523

\* The 2020 GHG intensity figure disclosed in our 2021 ESG Report represented Scope 1 and 2 emissions, per employee. This data point has been restated above to be consistent with our 2023 GHG Intensity figure, representing Scopes 1, 2, and 3 emissions, per employee.





**iManage**

Making knowledge work