

Independent regulator expedites decision-making, closes cases faster with iManage Insight+

Regulatory authority implements a powerful search and insights engine on the iManage Cloud platform to consolidate user access to case materials with its knowledge base



Industry:

- Business Services

Headquarters:

- London, UK

iManage footprint:

- iManage Work 10 in the Cloud
- iManage Share
- iManage Drive
- iManage Threat Manager
- iManage Insight+

Partner:

lexsoft
systems

- Lexsoft predominantly provides business solutions to the legal sector. The global company provides best-in-class solutions around knowledge and document management, document comparison, time tracking, CRM, and revenue acceleration.

This independent regulatory body manages crucial files with 10-year retention requirements alongside 50 years of accumulated knowledge and precedents. As long-time iManage customers, the regulator recently migrated its document management from iManage Work 10 on premises to iManage Cloud, gaining the added value of an enterprise-level cloud-native knowledge work platform. This lowered IT overheads, enhanced security, and increased operational resiliency. As part of this initiative, the regulator moved all user access to case files onto the iManage Cloud platform and removed the need to maintain paper files, resulting in further efficiencies.

The regulator also implemented iManage Insight+, with its powerful search and knowledge capabilities, to open the full spectrum of the regulator's resources to its workers, including its library of templates and precedents, on a single platform. This greatly improves the ability to search library content as users work, dramatically increasing their efficiency and enabling them to close cases faster.



Now we have quick and easy access to the right information, in the right context, at the right time, whether that means case documents in iManage Work or templates and precedents in iManage Insight+.

Head of IT, Independent regulatory body

Partner:



- Tiger Eye was established in 2005 to help clients work securely, boost productivity, and reduce inefficient practices. It offers standalone platforms and value-add solutions for iManage, as well as consultancy and support.

Business outcomes:

- Improves resource management
- Brings valuable insights to light
- Enhances security posture
- Frees IT for strategic innovation



We implemented Insight+ to improve the usability of our knowledge library and to give our users all the functionality they need.

Head of IT
Independent regulatory body

The business challenge

Update tools and accessibility to address people's pain points

The regulator handles up to 100 cases at once with a team of about 35 people. Cases involve all case documents, including items submitted by either side, related emails, and publicly available information, as well as internally generated documents traditionally saved in iManage. The information must all be retained for 10 years.

“Staff need to document every conversation they have, and it’s crucial for us to store and manage all that information according to the regulatory framework,” says the Head of IT.

In addition to its paper case files, the regulator maintained a knowledge library of approximately 15,000 template, precedent, and best practices documents in a separate application. These materials help staff expedite their decision-making, but surfacing the necessary insights was not as quick or as easy as staff would have liked.

“To maintain a consistent approach, we need to check every case against our knowledge library of precedents, and the speed at which we locate those insights dictates how fast we can close each one,” the Head of IT explains.

To help them manage an increasingly complex and expanding workload, the regulator wanted to make access to this knowledge base more convenient for its staff, enabling faster, more efficient searches.

The solution

Manage documents, knowledge, and insights with iManage

The regulator envisioned consolidating the knowledge library with its case materials on the secure, centrally governed, and highly accessible iManage Cloud platform. This would greatly facilitate the essential work that regulator staff perform, making knowledge easier to find and use without compromising on security.

With [iManage Insight+](#), a search and insights engine native to the iManage platform, the path to that goal became clear. But first, the tags and metadata associated with the knowledge library documentation needed to be preserved. Ensuring that the taxonomy of the knowledge library remained intact as it was imported to iManage Work 10 in the Cloud and made available to users via Insight+ was a team priority.

The regulator had iManage implementation partner, [Tiger Eye Consulting](#), lead its cloud migration, and brought in legal technology consultancy [Lexsoft Systems](#) to provide targeted expertise for the transition and integration of the knowledge library data. Lexsoft enabled the regulator to retain the taxonomy of those 15,000 documents while making them accessible to Insight+ from within the protected environment of the iManage platform.

Insight+ holds the documents that record the basis for a specific decision, so it’s essentially a huge precedent library. The culture is knowledge-driven, with employees meeting frequently to share any documents or precedents they want to add to the knowledge library. That information is collated and input into the knowledge library that sits behind Insight+.



We were licensing a specific software product for us to securely share content with third parties, and now we can share documents externally with iManage Share. It's an easy add-on to Work 10, and another added efficiency of the upgrade.

Head of IT
Independent
regulatory body



Achieving strategic goals and reaping the added benefits

Consolidating on fewer products and a single platform helps minimize the regulator's IT estate, licensing expense, and risk exposure, another strategic goal for the IT team.

"We were licensing a specific software product for us to securely share content with third parties," says the Head of IT, "and now we can share documents externally with [iManage Share](#). It's an easy add-on to Work 10, and another added efficiency of the upgrade."

"Ideally," they add, "everything is either iManage or Microsoft." iManage Work integrates seamlessly with [Microsoft 365](#), so staff can file case-related emails directly from Outlook. iManage co-authoring will also be available to users very soon.

"I'm quite excited about being able to use the integrations in Power Automate, with iManage," says the Head of IT. Currently, IT utilizes the [Power Automate connector](#) to extract content overnight from a feed and automatically file it in the corresponding workspaces in iManage.

A subset of regulator users also employs [iManage Drive](#) to handle filing publicly available information into iManage. "Using iManage Drive is a really effective way of saving information directly from the internet, which is something we need to do all the time," they affirm.

The regulator finds [iManage Threat Manager](#) useful, as well, using it to monitor for potentially risky user behaviors like tracking usage on files provided by third parties. "iManage Threat Manager also enabled us to confirm that Insight+ adoption is high," says the Head of IT.

The business outcomes

iManage Insight+ greatly facilitates decision-making

"We implemented Insight+ to improve the usability of our knowledge library and to give our users all the functionality they need. Now we have quick and easy access to the right information, in the right context, at the right time, whether that means case documents in iManage Work or templates and precedents in iManage Insight+," the Head of IT reports.

"Our people can leverage decades of best practices and precedents instantly using the advanced search capability of iManage Insight+. It greatly facilitates decision-making," they add.

And because it's all on the iManage Cloud, people have access to all the data outside of the office, outside of normal working hours. The Head of IT says they appreciate that as yet another benefit of the move to Insight+.

More functionality, greater resiliency, all on one platform

"iManage has grown with us, and that's huge. As Head of IT, I want to minimize change and disruption for my colleagues, so having a platform that adapts to our needs and has regular new releases is amazing," they explain.



Life's much less stressful with iManage Insight+ on iManage Cloud. Search was fast before, but now it takes just seconds. Everyone knows they'll find what they need in iManage.

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"iManage Cloud is hosted on Microsoft Azure, which is perfect for us," they continue. "We think the platform is more resilient, which improves our security posture. And it's available 24/7, so if there's a power cut in the building, we can still get on with our work."

The Head of IT says the transition was seamless. "iManage is intuitive. When we rolled out Insight+, all the staff were happy using it without any extra help. We're satisfied everyone is using the tools properly."

Thanks in large part to the work of their technology and implementation partners Tiger Eye and Lexsoft, users are seeing better performance and getting results back more quickly.

Modernizing access to all their materials in one central location has given the Head of IT time and space to think more strategically.

"Life's much less stressful with iManage Insight+ on iManage Cloud," they report. "Search was fast before, but now it takes just seconds. Everyone knows they'll find what they need in iManage."

"Now I can focus on exciting innovations in workplace technology instead of worrying that a server might fail and people won't be able to access the data they need," they add. "It feels like I've gone from being on the back foot to putting my best foot forward."

Looking ahead

The regulator is working with Tiger Eye to implement [iManage Security Policy Manager](#), which they can use to apply security parameters to all materials housed in iManage at scale.

A new product, [iManage Disposition Manager](#), has also piqued their interest. The Head of IT is responsible for deleting data when its 10-year retention period has elapsed. Disposition Manager will ensure that this happens, another step forward in efficiency.

AI is also in the roadmap. [Ask iManage](#) promises to make querying data in both Work 10 and Insight+ virtually effortless, amplifying productivity while keeping sensitive materials ultra-secure and adding to the organization's ability to adapt quickly as the regulatory environment evolves.

"As a small organization, being able to access the latest AI tools because iManage is investing in them is a real benefit. We wouldn't have the resources to do that in-house," the Head of IT concludes.

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.