

Operational Intelligence

How to Elevate Performance in Business Service Operations Management



iManage

Making knowledge work

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Executive summary

A changing global regulatory environment has increased costs and risks, clouding the business outlook and leading to a pessimistic view on corporate spending. Yet the demand for and complexity of legal work inside most corporations has only increased over the past years.

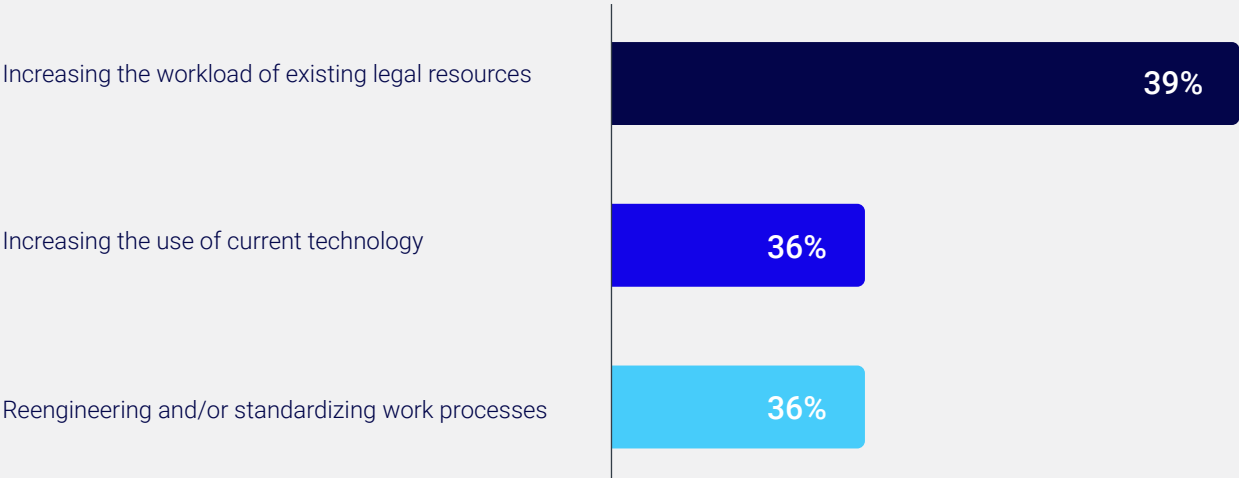
As highlighted in the [Thomson Reuters 2024 Legal Department Operations Index](#), 79 percent of legal departments report increasing matter volumes and 36 percent brought more work in-house, with 58 percent reporting flat or decreasing budgets from previous years. A [2024 Axiom report](#) calls out an expected “attrition wave” in corporate legal teams, wherein more than half (58%) of in-house lawyers surveyed are considering leaving their current positions. They cite “persistent resource gaps” as one of four motivating reasons.

How are legal leaders responding to these industry pressures? Respondents to the [CLOC 2025 State of the Industry Report](#) suggest working harder — but also using technology to re-engineer workflows. Reducing external spend by moving select workflows

to lower-cost firms or ALSPs, and insourcing a greater percentage of work by relying on knowledge management (KM) or artificial intelligence (AI) to repurpose work product, are also frequently mentioned.

However, most legal organizations and affiliated groups (such as compliance, risk, and HR) lack visibility of work across the department. Also lacking are data around processes that would help diagnose and identify gaps or logjams that cause missed deadlines. Traditional matter management systems are often used primarily to manage spend and — while important — provide no insight into service delivery and status. This is key to re-engineering processes, improving performance, and reducing costs.

Insights from CLOC 2025 State of the Industry Report — methods of handling growing demand



Operational intelligence is different. It builds on a foundation of documents and knowledge management, capturing data that generates real-time operational metrics and status for all work — not just litigation and larger matters. Operational intelligence enables better decision-making through data, displayed on live dashboards that link seamlessly to the work. This creates a data-driven understanding of incoming work and work in process. Use operational intelligence to identify issues and test new processes as you investigate stuck work, focus on urgent and high-

risk work, and re-allocate work based on changing demands. By making informed decisions, you'll improve team performance and open the door to delivering your highest impact work on time, with greater consistency, quality, and at a lower cost.

The adoption of technological solutions such as artificial intelligence, cloud computing and advanced platforms for document management is radically changing how legal offices work.



iManage, the legal industry leader in document management, has partnered with Co-Flo to deliver a complete operational intelligence solution

What is operational intelligence?

Operational intelligence is the real-time presentation and analysis of data to provide actionable insights for immediate decision-making and operational improvements. It enables you to collect an extended set of operational data about your in-progress work and how your organization is processing that work.

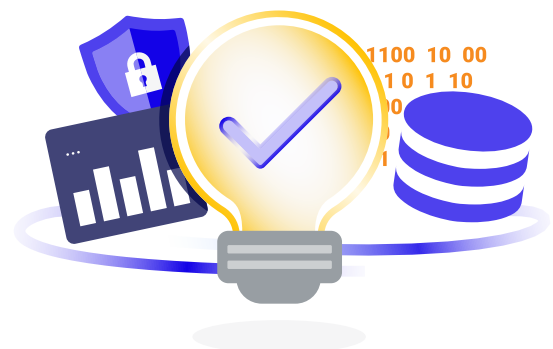
Operational intelligence delivers powerful operational insights and metrics that were not previously possible, or practical, to obtain at scale for all your department's work in process. These insights lead to data-driven innovations and process improvements, while improving the quality and consistency of service delivery globally.

When speaking to legal, human resources, or compliance and risk departments, we often hear about the lack of visibility and oversight they have over the work their teams are doing. Many rely on legacy manual processes to manage the workload, which are inefficient and provide limited ability to spot bottlenecks or other problems. These often escalate if not recognized and addressed early. People also say collaboration between departments can be frustrating. Ensuring data security and regulatory compliance are consistently upheld and maintained while communicating between separate, incompatible systems can make it difficult to get the right information to the right person at the right time.

Imagine having the clarity to answer the essential operational questions about your team's work — questions that motivate, keep projects moving forward, and help people deliver high-quality results on time.

Operational Intelligence starts with five essential questions:

- 1. How much work is coming in, of what kind, and from which organizations?**
 - Track changing demand and justify resource allocations.
- 2. Who is doing the work?**
 - Balance workloads and use people's time efficiently. Re-balance as needed.
- 3. What is the status and stage of the work?**
 - Deliver consistent, timely outcomes that impact the bottom line.
- 4. Where is the work blocked?**
 - Identify bottlenecks early to keep work delivery on schedule.
- 5. What risks are hiding in the work?**
 - Prioritize high-value work to mitigate the risk potential of any issues that arise.



It then presents these insights in real time on dynamic dashboards that link the user directly to the relevant workspace in iManage – the legal industry’s foremost cloud-native document management platform. With operational Intelligence, this workspace represents more than a matter; it represents case, project, agreement, audit, policy, vendor, employee, and more – opening the door to use beyond legal, including compliance, risk, and human resources. Now multiple departments can collaborate on common and connected work while maintaining a strict need-to-know security posture, an iManage hallmark.

Operational intelligence answers a sixth, and perhaps still more impactful question – one asked routinely by lawyers and other corporate service professionals:

6. What work and action items am I responsible for?

- Track changing demand and justify resource allocations. Is there anything overdue?
- Is there anything that I missed?
- What should I prioritize among my work?

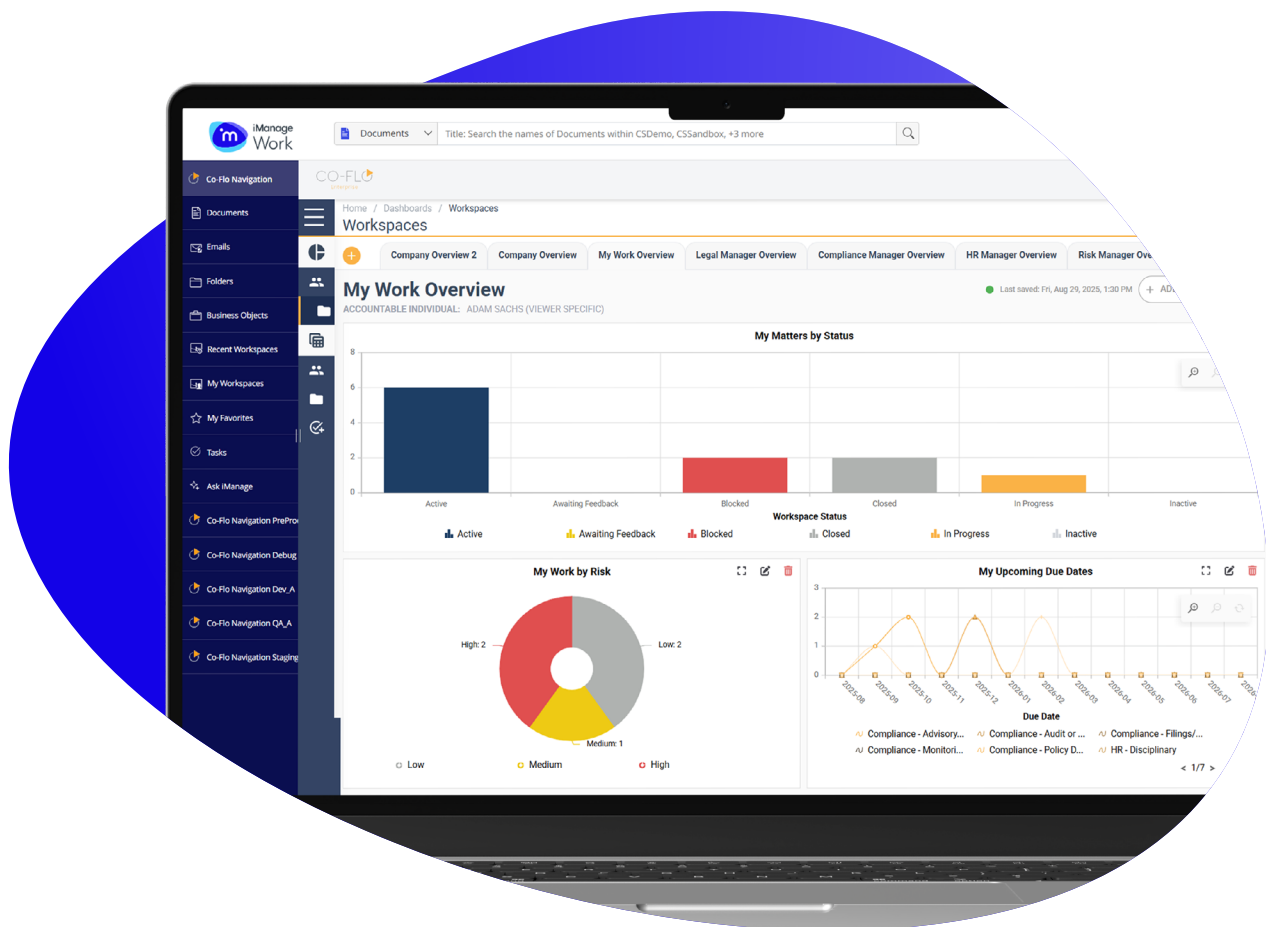


Fig 1 – Operational Intelligence Dashboards

Interviews with legal professionals reveal high levels of concern with this question, especially attorneys who have come from law firms. For various reasons, most work comes in manually or by email. Even with a matter management system in place, a large percentage of the total work in process can actually be “unmanaged.” Without a way to control this unmanaged incoming work, problems can ensue. As can be imagined, for legal organizations or other departments that have no matter management or similar system in place, the lack of control and visibility over work in progress may be even greater.

This is why operational intelligence is so important to every attorney and staff member. By capturing all work requests, operational intelligence becomes the single source of truth to the individual user, answering the perennial questions:

- What’s done?
- What’s isn’t?
- What should I work on next?

Operational intelligence removes the burden of interrupting other work to address every request as it comes in. The requester is informed that the request is being worked on. An SLA can establish the anticipated completion time of the request before it is flagged as potentially delayed. Every matter is cataloged, controlled, and attended to, reducing stress among

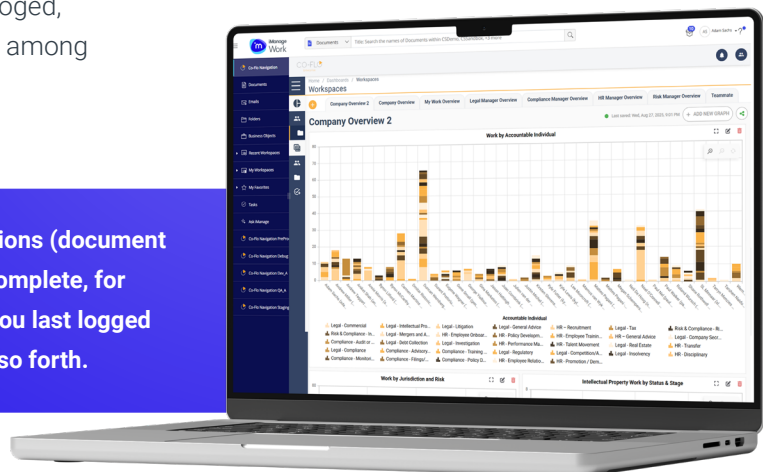
staff. And because it all happens within the iManage interface, users move seamlessly from the work queue to doing the work.

Imagine, as a staff lawyer, you are commuting to work and checking in with iManage on your mobile device, or logging in to iManage at your desk, and you are greeted with a comprehensive report.

Operational intelligence starts with a (unit of) work-centric view, which begins with the actual work, typically in the DMS, versus the spend. It captures and enriches key (meta) data around that work, such as work type, department or group requesting, work completeness, and status. It further enriches the dataset with information imported from enterprise systems such as ELM/Matter Management, ERP, and HR to create a single source of operational truth for all work processed.

Crucially, operational Intelligence does this for all work types, from litigation and large matters down to the simplest advisory request. For the first time, you have a single source of truth for key operations data on all work in process; all work is visible, controlled, and analyzed for efficiencies, as well as being mined for insights.

Even better, you can filter the displayed actions (document edit, document approval, and work-stage complete, for example) over a set period, such as since you last logged in, 4 hours ago, x number of days ago, and so forth.



How operational intelligence differs from matter management

Based on industry shifts, traditional matter management has evolved to focus on e-billing and managing legal spend, so it's no surprise that most management matter management systems take a “spend-centric” view of the information.

While this is effective and very much needed in managing the law panel and legal spend, matter management as practiced today is used predominantly by attorneys for litigation matters (due to cost recovery) and select large matters. This means most of their work is handled outside the matter management system.

Operational intelligence, on the other hand, starts from the work being done. It adds a much more comprehensive “real-world” view of the organizations and entities being interacted with, as well as the complexity of the work. The value and ROI delivered by its dashboards, reports, and insights are different than those delivered by spend management.

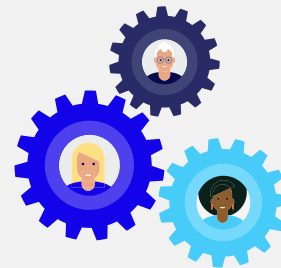
Where matter management systems focus on controlling external spend, operational intelligence drives internal efficiency by improving how work is tracked, shared, and completed across teams. It helps reduce delays, eliminate blind spots, and promote consistency in every department that uses iManage.

Of course, even the most advanced solution is only as effective as its adoption. Operational intelligence stands apart by making itself indispensable to every system user, beginning on day one.



Spend Management View

- Units: spend, budget (\$)
- Focus on financial
- ROI from: Spend savings
- Often just for litigation



Operational Intelligence View

- Units: Advisory, lit, policy
- Focus on production
- ROI from: Productivity, risk reduction
- Used for all work

The real-world impact of operational intelligence

Whether you're tracking legal requests, managing compliance workflows, or balancing team workloads, operational intelligence supports how modern teams work. The examples below show how it helps both individuals and managers stay focused, efficient, and in control.

For individual team members

Challenge: How can I effectively manage my work?

Today's legal professional has a dynamic and changing workload spanning many legal matters simultaneously. New requests come in through both formal channels and emails. How can each staff member focus on high-priority or urgent items to optimize their impact while ensuring that nothing falls through the cracks? All too often, lawyers are scanning inboxes for work or necessary actions, a constant source of distraction, stress, or anxiety.

Solution: The personal work pipeline.

A single Co-Flo dashboard displays all work assigned to "me," by next action date, priority, or based on what has changed, and more. With one click, I can go directly from this dashboard to the iManage workspace. There, I can open and review documents, identify the source of a work blockage, and often resolve it — all without leaving the familiar iManage user interface I spend most of my day working in.

Impact:

Identifying the actions that will deliver the greatest impact increases personal productivity and reduces any stress or anxiety around missed actions or requests. Team performance is enhanced as efforts are orchestrated and prioritized. Status calls, project updates, and the ubiquitous "Where are we on ... ?" emails decrease, as dashboards are consulted for detailed answers.

Challenge: My work is different — how can I manage "my kind of work"?

All matters are not created equal. Each has associated data and a best-practice work plan unique to that work product. Each also entails a degree of complexity (and labor) that impacts your staff. Not understanding the

nature of incoming work can result in overloading staff and commensurate delivery delays. Not having consistent work plans for each type of work can result in inconsistent service delivery across offices or territories and create a barrier to re-engineering processes to save money.

Solution:

With operational intelligence, you can categorize and capture all work types for each practice, for example, whether it is a domestic or international trademark, a simple agreement, or a complex contract. Each work type has specific metadata, task list, workspace template, and more, allowing for a detailed view and consistent management of multiple and varied kinds of work. Each work type can also be assigned a degree of effort to facilitate basic workload estimation and better forecasting of labor requirements. Legal, compliance, and risk work can all happen in one shared workspace for truly effective cross-department task management and collaboration.

Impact:

The impact here is far-reaching: More detailed work categories allow for more specific work assignments and delivery templates that make work processes more consistent. Team members get the most relevant assignments, and management expectations are tempered by solid data on each person's workload, reducing stress. Managers can reassign multiple work items to other team members based on workload imbalance, vacation, leave of absence, promotion, retirement, or other staff changes, and avoid possible staff crunches. Turn-around times are easier to predict based on the current workload for each type. As you tune team skill sets to specific work types, you can be more effective in hiring to fill gaps.

For Managers

Challenge: How can we intelligently re-engineer workflows for better performance?

Solution:

Processes that are measured can be improved. With the iManage Co-Flo solution, you define specific stages and tasks for each type of work that embody your best practices. By monitoring, you can identify bottlenecks, missed steps, and other irregularities, and continue to iterate by changing the task list.

Impact:

Stage and task lists ensure consistent performance and complete delivery of all work. Simply modifying a task list can change behavior across your organization, so change occurs incrementally and process improvement is frictionless.

Challenge: How do we ensure that we prioritize the right work across the organization?

Solution:

The iManage Co-Flo solution enables metadata such as risk, priority, and value to be associated and stored with each specific work item. Dashboards display live views into high-priority or high-risk work for each employee, department, or the organization. Progress can be easily monitored, eliminating the need for frequent status meetings and “Where are we on X?” emails.

Impact:

Prioritization is fluid, updating as the situation changes, and all actions across a diverse organization are orchestrated for optimized delivery.

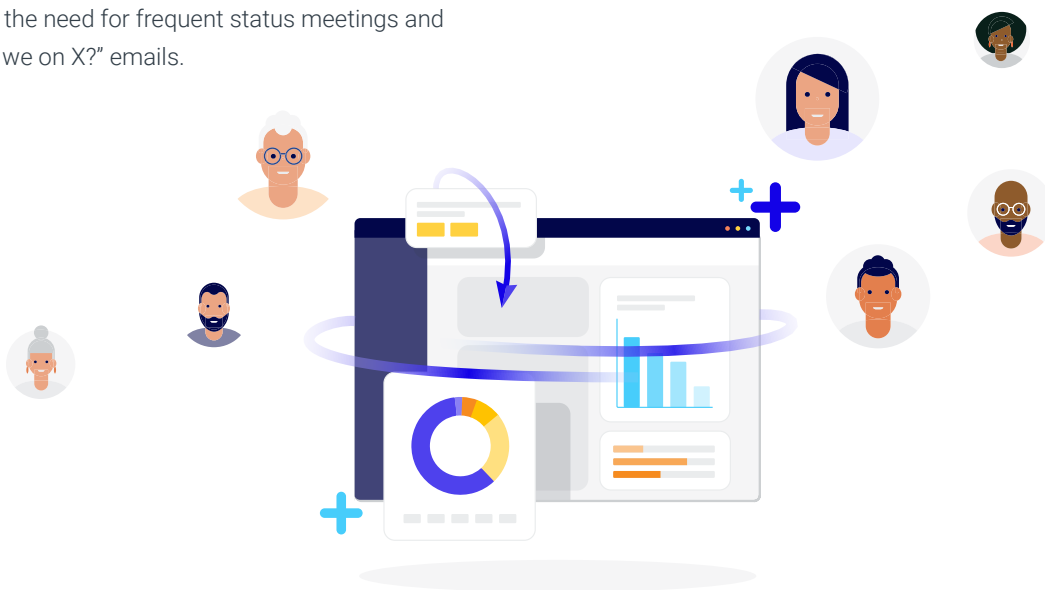
Challenge: How do we make a data-driven case for innovation and resources?

Solution:

Reporting from the iManage Co-Flo solution can document and quantify changing incoming workloads, their associated complexity, and labor needs. Changes in risk across the organization are easily identified, quantified, and addressed. Changes in delivery, throughput, or SLA performance can be tied to specific reforms and re-engineering of processes, demonstrating the impact of your innovations. Critical date reminders ensure no obligations are missed and provide further evidence of the technology's value.

Impact:

Align arguments for resources with corporate goals and cite data-driven arguments to grow your budget rather than seeing it shrink in a challenging business environment.



How operational intelligence drives adoption and behavioral change

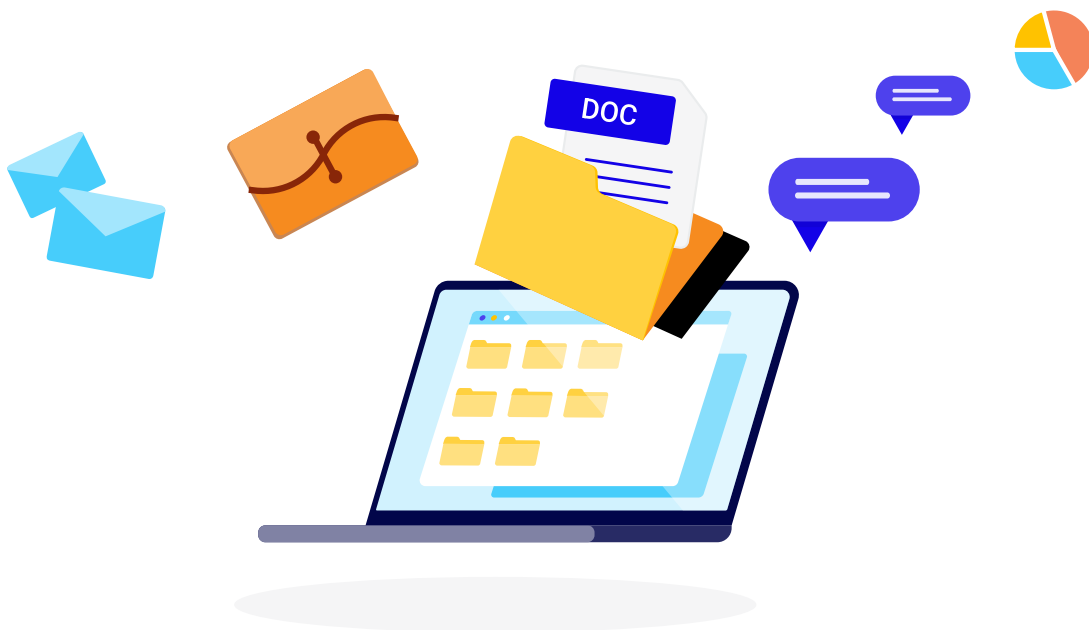
Every technology transition presents the challenge of persuading people to try a new way of working. What is the secret to successful adoption results? It may be a matter of too many choices.

Legal professionals have told us they have as many as six different company-approved systems in which to store documents, and no clear direction about where to store what. Successful adoption begins with a clear directive to all staff about what systems to use when working and where to store the product of their work. Effective training is also key in a transitional period. In addition, senior leadership can send a strong message to use the new solution by championing the technology during rollout, then advocating and modeling the desired behavior by using the system after rollout.

All that said, the pragmatic view is that **users will adopt a solution when the WIIFM (what's in it for me?) exceeds the individual's resistance to change.** In this case, operational intelligence has an enviable advantage in your ability to show each individual their personal work pipeline and dashboard.

You can easily demonstrate to them how this valuable new productivity tool reduces the need for status emails and meetings, ensures all work is tracked, and eliminates anxiety around missed emails or deadlines. This is why iManage anticipates strong adoption of this incredibly helpful tool among its users.

It may sound cliché, but “you measure what matters” is more relevant than ever. As organizations drive towards their North Star strategic objectives, behavioral change decides whether those objectives are unmet, reached, or exceeded. Operational intelligence delivers compelling real-world impact to its users. Reinforce those benefits with management support to drive behavioral change, surpass adoption expectations, and enjoy the full benefit of your investment.



Case Studies – the real-world impact of operational intelligence

Industry leaders are unlocking the true power of operational intelligence — streamlining processes, cutting costs, and transforming complexity into a measurable impact. These success stories show how.



Mercedes-Benz

A global luxury automotive leader, Mercedes-Benz transformed its fragmented legal operations into a connected, intelligent system with iManage and Co-Flo. By integrating Co-Flo with their HR platform (MyStructure), they have automated organizational updates, user roles, and security — turning months of manual admin into instant changes. Now, 95 percent of data fields are standardized across departments, reorganizations are effortless, and teams spend more time on strategic work, not chasing paperwork. The result: fewer silos, greater compliance, and a clear, scalable way to manage legal and corporate information on a global scale.



As Africa's leading entertainment provider, MultiChoice needed to tackle growing contract complexity and bottlenecks. With Co-Flo and iManage, they replaced email chaos and outdated systems with smart workflows, an integrated clause library, and real-time dashboards. This gave legal teams visibility into every request, SLA, and approval — with turnaround times dropping from 7–10 days to 2–5 days and complaints reduced to near zero. The result? Productivity gains of more than 40 percent, better cost control, and the ability to adapt without changing how they work.

Talk to a Co-Flo solutions expert

Book a demo

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 to learn more.