

Digital Commerce Bank unifies diverse teams on one platform

Growing Canadian fintech group fulfills CEO's vision of centralized content on a governed, AI-ready foundation with iManage



Industry:

- Financial Services

Headquarters:

- Alberta, Canada

iManage footprint:

- iManage Work 10 in the Cloud
- Ask iManage

Digital Commerce Bank is a Canadian group of companies that operates a Schedule I bank alongside several fintechs and e-commerce businesses. As the organization expanded and its documents multiplied across email inboxes, personal desktops, OneDrive, SharePoint, and file servers, there was no single place to find the authoritative version of anything. With iManage Work in the Cloud and Ask iManage available across every department, the Chief Technology Officer has given the bank's 70 users a centralized, governed place to find and store their work and connect with the other AI tools the organization relies on.



Once I learned about iManage and its capabilities, it was a no-brainer. SharePoint and OneDrive are technology solutions, not document solutions. iManage was a click and [the document] became available.



Paul Twigg, Chief Technology Officer,
Digital Commerce Bank

Business outcomes:

- Single source of truth
- AI-assisted duplicate detection
- Governed document access
- Faster retrieval, compliance and regulatory
- Seamless Microsoft integration



All of a sudden, it was easy. We don't have to save to our desktop. There's an Outlook integration to exactly where the document is stored in iManage.

Paul Twigg, Chief Technology Officer, Digital Commerce Bank

The business challenge

Managing documents across a growing organization

Rapid growth and tidy document management rarely run in parallel. At Digital Commerce Bank, file organization was less than ideal, with each team habitually storing documents wherever it was easiest. Legal had one repository. Technology had another. Sales had their own folder of vendor contracts. When Paul Twigg joined Digital Commerce Bank as Chief Technology Officer, he found at least three separate repositories of vendor contracts alone.

It was very hard to say where all the versions of a specific document were, or even who had the latest version. "We're often on the receiving end of litigation, and being able to find all of the documents associated with a specific subject wasn't an easy task," says Twigg.

The burden fell on individuals to maintain their own siloed archives. Version control was informal, with some documents carrying entire paragraphs as their file names, an improvised attempt to describe what was inside them. SharePoint was used across the organization, but — Twigg would later reflect — it was a place to put things, not a system built to manage them. It's easy to set up, harder to keep organized, and lacks the document-level numbering and metadata that make version history genuinely usable. Teams lost measurable time in document retrieval efforts, and there was a non-trivial risk that the wrong version of a document might be used when it mattered most.

In a growing financial services business, that level of ambiguity around something as fundamental as document version control was not sustainable.

The solution

A phased migration built around the business, not the technology

When Digital Commerce Bank's CEO articulated his vision for a single, centralized document store, Twigg's first instinct was skepticism. As a former SharePoint specialist with a decade of migration experience, he knew the arguments for staying within the Microsoft ecosystem. SharePoint was free, familiar, and already in use. But Twigg sat down to test whether iManage could deliver it.

"Once I learned about iManage and its capabilities, it was a no-brainer," says Twigg. "SharePoint and OneDrive are technology solutions, not document solutions. iManage was a click, and [the document] became available."

The bank adopted a phased approach, with legal and sales going live first. While the legal team had the most document-intensive processes and the greatest need for technical competence, the sales team's documents had the highest number of touchpoints across the organization. Twigg and his colleagues mapped out each team's information architecture, department by department.



iManage has given us a lot of good flexibility with version control, which is just seamless to the end user. We can compare versions and bring previous versions forward instead of saving the same document with a different file name.

Paul Twigg, Chief
Technology Officer,
Digital Commerce Bank

Some teams had well-structured document hierarchies. Others relied more heavily on search than folder structure. iManage accommodated both.

As each department migrated, its previous file shares and SharePoint libraries were set to read-only, giving users the confidence that nothing had been lost, while steering them toward [iManage Work in the Cloud](#) as the place to save new work. By the time of go-live, every department was on the platform.

The [Microsoft](#) integration was among the first things the organization configured. The Outlook plug-in prompted users to file emails as they sent them, a small change that quickly made sense. “All of a sudden, it was easy,” said Twigg. “We don’t have to save to our desktop. There’s an Outlook integration to exactly where the document is stored in iManage.”

The business outcomes

A well-organized, governed foundation for AI

Digital Commerce Bank migrated a compliance document library of several hundred thousand documents over a weekend. The bank consolidated a sprawling document environment into an integrated, well-organized, user-friendly platform where advanced document governance supports the bank’s regulatory obligations.

“iManage has given us a lot of really good flexibility with version control, plus the numbering, which is just seamless to the end user,” remarks Twigg. “We don’t have to worry about it. We can compare versions and bring previous versions forward instead of saving the same document with a different file name.”

In the early stages of implementing AI across its document environment, Twigg sees the work done on information architecture as foundational for what comes next. With documents consolidated and information architecture in place, the organization moved quickly to connect [Ask iManage](#) to the newly organized content. Ask iManage is now live with roughly 10 users in legal and technology and plans to extend it to the full 70-person user base. The legal team uses the AI assistant to compare documents and draw insights without any documents or content leaving the governed platform. The technology team uses it to surface what is missing, identify duplicates, and interrogate the state of the repository.

Governance is controlled by the librarians who preside over iManage. “Our biggest risk with AI is our documents or our information going outside of our organization in an uncontrolled way,” says Twigg. “One of the things we use Ask iManage for is to say, go find all the duplicates of a specific document. Then our librarians can make sure those documents are filed appropriately within the new file structure and remove all the duplicates in the system.”



One of the things we use Ask iManage for is to say, go find all the duplicates of a specific document. Then our librarians can make sure those documents are filed appropriately within the new file structure and remove all the duplicates in the system.

Paul Twigg, Chief
Technology Officer,
Digital Commerce Bank

Twigg is structuring the AI tools to complement one another rather than compete. Digital Commerce Bank uses Microsoft Copilot for enterprise queries, Harvey for legal work, and Ask iManage for document queries and workflow. Twigg describes the ambition for a world where junior team members can draw on AI trained by senior colleagues to produce work that would otherwise have required far more time and skill to create.

Looking ahead

With plans to connect its AI tools more deeply through [iManage MCP server](#), Digital Commerce Bank sees iManage as the governed content layer that makes that expansion possible without compromising the permissions and controls already in place.



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.