iManage
Making knowledge work

# Pinheiro Neto Advogados enhances knowledge work across the enterprise

Strategic move to iManage Cloud boosts top law firm's productivity, security, and competitive edge



## PINHEIRONETO
### A D V O G A D O S

**Industry:**

- Legal

**Headquarters:**

- São Paulo, Brazil

**iManage footprint:**

- iManage Work 10 in the Cloud
- iManage Share
- iManage Drive
- iManage Security Policy Manager
- iManage Threat Manager

Pinheiro Neto Advogados is one of Brazil's largest and most prestigious law firms. Established in 1942, the firm has maintained a pioneering spirit and global vision throughout their history. The firm is a full-service legal provider with 1,000+ employees across three cities in Brazil, in addition to offices in Palo Alto, California, and Tokyo, Japan.

A leader in legal innovation, Pinheiro Neto Advogados recognized the need for modernization, becoming an early adopter of the iManage document management system. When their on-premises infrastructure became increasingly complex, they made the strategic decision to transition to the cloud with the help of iManage partner, Docwise. This move enhanced their security policy management, improved threat mitigation, and fostered greater collaboration and productivity. Since the transition, the firm has achieved a remarkable 100 percent user adoption rate among its staff.

## DOCWISE

### About Docwise

Docwise specializes in helping companies set up work management platforms. It has 20 years' experience as an iManage reseller and is based in São Paulo, Brazil.

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**Leandro Malandrin**
*Director of Innovation & Technology, Pinheiro Neto Advogados*

## The business challenge

**Providing secure access to the right documents at scale**

Innovation has been in Pinheiro Neto Advogados' DNA since day one. Protecting their reputation as the country's most prestigious law firm means staying ahead of the curve and delighting clients. They have found that when innovation meets technology, great things happen.

"A lot of new workplace technologies have gone to market in recent years. At Pinheiro Neto, we embrace that innovation, but it can be challenging to do so in the legal sector, where lawyers are known for taking a conservative approach to change," says Leandro Malandrin, Director of Innovation & Technology at Pinheiro Neto Advogados.

Great technology is particularly crucial for a firm whose 700 attorneys and 300 supporting admin staff rely on fast access to huge volumes of data. And Malandrin's team is responsible for more than just making documents available; they also need to ensure that the documents stay secure and comply with strict internal governance. The team built internal tools that monitor document usage to achieve this, but as the volume of data grew, the task became increasingly complex.

"We needed to simplify the application of security policies at scale while maintaining high levels of data integrity," recalls Malandrin. "We wanted a reliable and user-friendly platform that gave us more control. It also needed to be a cloud solution, as recovering an on-premises system could take weeks if there was a major incident."

## The solution

**Simplifying access management while enhancing productivity**

As an iManage customer for more than 20 years, Pinheiro Neto was among the first law firms in Brazil to adopt the platform. With stellar user adoption, the decision to meet the firm's evolving technical requirements by migrating to iManage Work in the Cloud was easy. By adding iManage Threat Manager and iManage Security Policy Manager, they were able to implement stronger, enterprise-wide data security policies.

"Our staff were already happy working in iManage, and we'd built many workflows and policies for it," explains Malandrin. "We weren't interested in any other solutions. iManage has all the right functionality in a single platform and we could retain the document structure we'd developed over the years."

The firm partnered with Docwise — another long-term partner with close knowledge of Pinheiro Neto's IT landscape and requirements — to streamline the migration. The cutover went smoothly over just one weekend. Pinheiro Neto provided face-to-face training and adapted the platform to meet the needs of both legal and administrative staff.

Pinheiro Neto has integrated iManage Work 10 with Microsoft 365, Digital Time Capture, and Azure Active Directory for single sign-on. Staff use the iManage Work panel for fast access to platform features from Outlook and enjoy the enhanced search function. The IT team also rolled out iManage Share to control the flow of documents across and outside of the firm.

"We have an internal workflow in iManage Security Policy Manager to manage how staff share data. It gives us more control than other solutions," says Malandrin. "We integrated iManage with Microsoft Access Control to ensure that no one can directly access the platform unless they're using one of our corporate devices."

Pinheiro Neto uses iManage Threat Manager to monitor user behavior. The application detects any unusual activity that may indicate non-compliance with internal policies. It also helped the firm document its impressive user adoption success. If the IT team sees someone isn't using the platform properly, they can reach out to offer additional guidance.

"Before iManage Threat Manager, we didn't have that real-time overview of our platform. Now, we've got reports, alarms, and triggers we can use to better monitor system health and data security," says Malandrin. "It also makes it easy to demonstrate our compliance to clients during audits. All the documentation we need is already there."

### The business outcomes

#### Universal adoption across 1,000 employees

iManage Cloud enables this prestigious global law firm to exert greater control over its data while improving productivity and collaboration. The cloud platform is more reliable, allowing recovery in hours rather than weeks in the event of an incident. Although the system has never gone down, the firm conducts disaster recovery scenario testing every year to ensure they are ready.

Malandrin is proud of the firm's adoption rate of 100 percent of its users actively engaging with the platform at any given time. "Everyone from senior counsel to junior admin staff uses iManage," he says. "When you walk through one of our offices, every single employee has iManage open on at least one of their computer screens."

He adds how the IT team now spends less effort on things like version control because the platform manages it automatically. Everyday tasks such as filing, finding files, co-authoring, and collaborating are so much easier in the cloud.

"The metadata stored with every document and legal matter keeps them organized. It's part of our culture to refer to documents by their iManage ID number, so everyone knows which version of which document or legal matter to work on," says Malandrin.

Malandrin says the firm's advanced use of technology has consistently given the firm a competitive advantage. True to form, Pinheiro Neto were one of the first Brazilian firms to move to the iManage Cloud.

"Clients understand that we invest in the best technology. iManage is used around the world, both by law firms and by knowledge workers in other sectors," Malandrin explains. "That reassures our clients that we take their matters seriously and we are focused on their cases."

## Looking ahead

The IT team is currently using iManage Drive and plans to roll it out across the entire organization. They're also excitedly anticipating getting access to iManage AI to enhance due diligence processes.

"Ask iManage will help us analyze and extract the right information from multiple documents in a structured way," says Malandrin. "It will bring us closer to the data we've stored on the platform."

And, as part of their drive for operational efficiency, Pinheiro Neto are exploring additional platform integrations. "My advice for other firms," Malandrin concludes, "is to implement policies, processes, and integrations alongside iManage rather than using it in isolation. This way you can truly embed it in your culture and maximize your investment."

**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.