Enabling Positive Outcomes with iManage

Insights from qualitative interviews with customers, non-customers, and partners

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PURPOSE

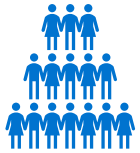
PROJECT GOALS

- Identify business outcomes for all market segments via direct customer interviews
- Sharpen our understanding of customer outcomes, and apply it in success stories, testimonial quotes, use cases
- Elevate our value language to around our ability to deliver strategic outcomes
- Enable Sales, Marketing, Customer Success and other teams with stronger messaging, proof points, and differentiation

Overview of methodology

Participants

40 respondents, including:



20 iManage customers
9 Customers of competitors
11 iManage partners

Technical and **business decision makers** in legal and non-legal departments across verticals

Participants were sourced via iManage contacts and external recruitment vendor efforts

Data Collection

36 **in-depth interviews**, conducted virtually

One hour per interview

Topics explored:

Technology context, including buying journey

Outcomes desired from document management

Relationship with iManage and other vendors

Data Analysis

Identified and **grouped patterns** from verbatim transcript

Coded patterns for relevant **themes** and **trends**

Analyzed themes against hypotheses to deliver **insights**

* We spoke to multiple respondents in some interviews

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DELIVERABLES

WHAT WE GET

- Executive Summary presentation and readout
- Detailed Report and readout by practice group
- 3 customer deep dives
- 12 attributable customer testimonials
- 20 anonymized customer testimonials
- Customer research statistics

What makes an outcome an ‘outcome’?

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Not everything is an outcome...

Introducing a taxonomy and definitions for Goals, Strategies, and Outcomes.

	GOALS	STRATEGIES	OUTCOMES
DEFINITION	Goals are often loftier, more aspirational, and focused on the future state. Goals are also more likely to be vague and not defined by specific metrics.	Strategies are tactical ways to start working towards that goal. They could be software, policies, processes, or workflows that help further the goal.	Outcomes are strategic business accomplishments that business leaders and users regard as a success.
IN REAL LIFE…	**“We need to…”** **“We want to…”** **“We hope to…”** **“We aspire to…”**	**“We’re implementing…”** **“We’re adopting….”** **“We’re building….”**	**“We achieved….”** **“We improved…”** **“We gained….”** **“We differentiated by…”**

It is important to differentiate between outcomes and product- or IT-focused outcomes.

Product or IT outcomes are the direct benefit of using a solution or services and are often in support of higher-level outcomes.

Product outcomes ENABLE outcomes.

Example: A product outcome may be greater uptime, which enables the outcome of better business continuity and end-client experiences.

Framework is from 'The Outcome Generation'

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What we learned

Customers saw IT and product outcomes as enablers for larger business outcomes.

When promoting the outcomes that a vendor can deliver, it is crucial to limit technical jargon and focus on business and end client benefits.

Enabling broader business outcomes is what makes a brand a partner, not just a vendor.

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The most powerful outcomes focused on creating value, not just mitigating risk.

While adoption may be triggered by the need to improve security or compliance, Decision Makers often experienced unexpected outcomes that offered far greater value and that were a culmination of several smaller outcomes.

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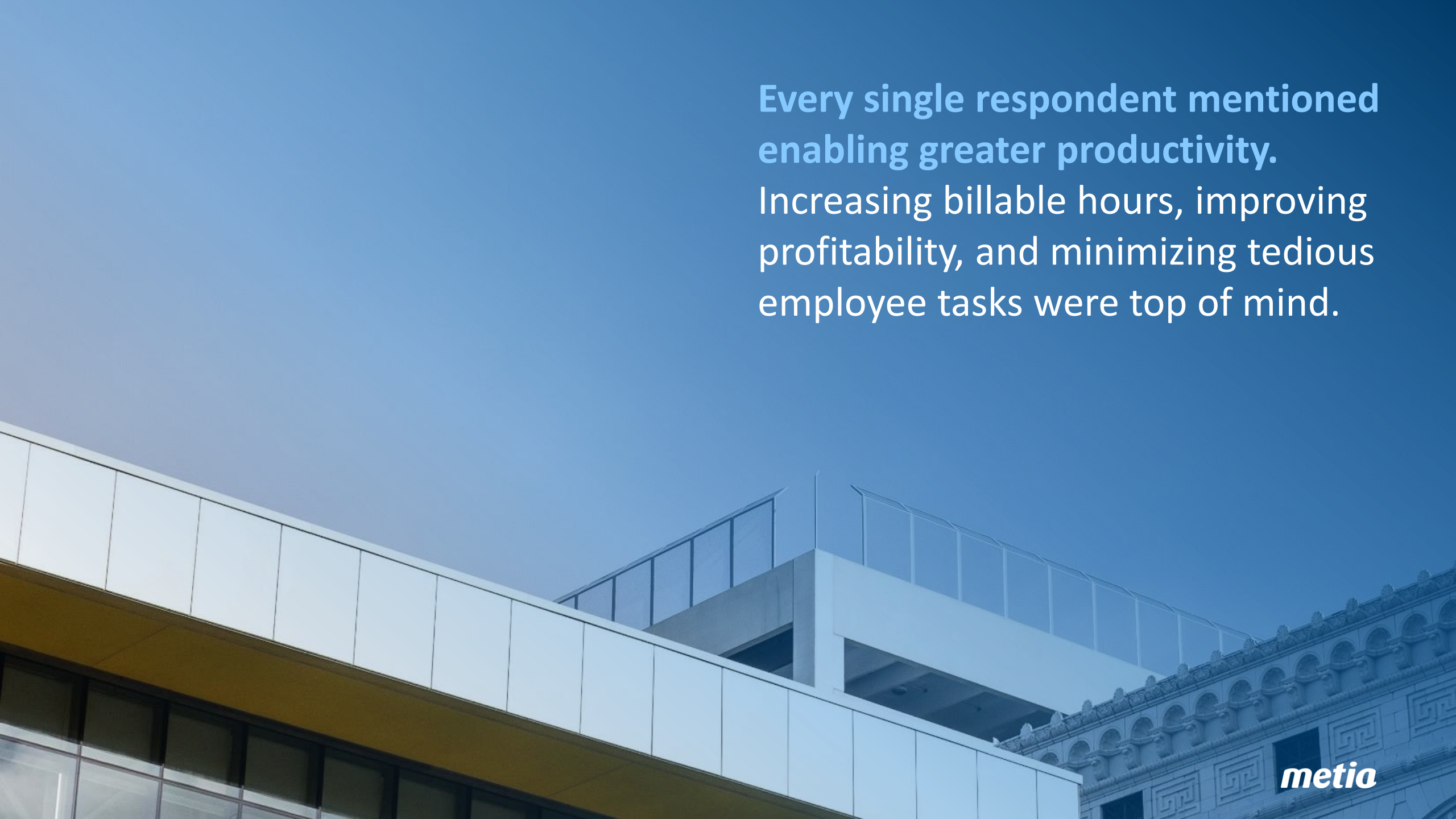
Every single respondent mentioned enabling greater productivity.
Increasing billable hours, improving profitability, and minimizing tedious employee tasks were top of mind.
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Exploring the outcomes that matter to customers and non-customers

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Overview of top outcomes discussed by messaging pillar

MORE DISCUSSED

LESS DISCUSSED

CREATE

iManage is a catalyst that activates employee expertise to create value for the business.

92 mentions

- Making documents more discoverable and teams more productive through **intelligent, 'Google-esque' search tools and robust organizational structures**
- **Creating a 'single source of truth' for institutional knowledge** that captures the expertise of current, past, and future employees
- **Automating the mundane** so employees can focus on customers and creating value
- **Being able to find the best examples of content** to facilitate knowledge re-use
- **Making more educated and confident business decisions** with document AI and analytics

COLLABORATE

iManage organizes projects with context and safe sharing so teams can achieve a common goal, anywhere.

46 mentions

- **Easily sharing files and documents with clients** or external counsel, no matter what platform they are on
- **Allowing teams to work virtually 'side by side'** without being in the same place
- **Enabling flexible working paradigms**, including remote and hybrid work
- **Facilitate cross-device access to documents**, optimized by device type, for better remote collaboration

PROTECT

iManage solves the tension between security and ease of use by baking world-class governance into workflows

56 mentions

- **Protecting work from loss** due to technical errors, device crashes, and deletion
- **Streamlining and de-risking compliance** and regulatory audits
- **Managing the complexity of access management** and need-to-know-access
- **Spending less mental energy worrying about security** by transferring responsibility to a vendor
- **Preventing data leakage** from employees
- **Preventing against external threats,** especially ransomware

INNOVATE

iManage democratizes knowledge work innovation with a vibrant ecosystem of partners and integrations.

27 mentions

- Saving time filing and processing documents by **integrating document management with other core document applications**
- Creating a seamless employee experience by **integrating document management with core Microsoft applications**
- Migrating to the cloud to **quickly access new updates, features, and partner integrations**

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Most-discussed **'Create'** outcomes

MORE DISCUSSED

LESS DISCUSSED

COLLABORATE OUTCOME	ADDITIONAL INSIGHTS	SUPPORTING VERBATIM
Enabling greater productivity through **intelligent, 'Google-esque' search tools and robust organizational structures** 22 respondents mentioned this	• Employees search for documents multiple times a day, so inefficient search adds up over time • Employees are looking for the same intelligent search functionality they experience in their consumer lives • Intelligent search can replace the need for extensive metadata tagging • AI that can automatically extract clauses would be a major benefit	"We've got 130 to 150 million documents in the library. To actually find something that you're after is pretty challenging…**if we can improve search across nearly 3000 users, you can see great efficiency each day based on much more simplified search**." – Gary, Chief Digital Officer, Minter Ellison "That [searching for a PowerPoint presentation 12 months ago] **would've been a two-hour job before, now I just do a keyword search [on iManage] and I get it.** Like it seems to know what I'm looking for." – Andrew, CIO, Grant Thornton Australia
Creating **one, central space** for knowledge to live and collaboration to occur 18 respondents mentioned this	• Heavy focus on the 'way it was before,' with everything living in multiple repositories, on different people's machines, in email, etc.	"There are several clients that we work … where iManage is served as a way to keep consistency in how we do the work front and center. So that **every time a new person comes on to work a case, they are delivering the material in the way the client expects**." – Rick, CIO, Perkins Coie
Minimizing manual tasks so employees can focus on customers and creating value. Enabling teams to focus on what matters 15 respondents mentioned this	• Emphasis on increasing billable hours by minimizing administrative hours • This is particularly important for respondents in Legal who want to use time saved on search and admin on improving client outcomes • Respondents also want to create new revenue streams (or strengthen existing ones) with the additional time gained	"How can we automate this process that you're doing to make life easier for your people? Because **if you can spend less time doing it, and that's fixed-fee work, we fundamentally raise our productivity and profitability**. So those are the kinds of questions that we're really looking to have beyond just technology … **how do we use technology to continue to deliver excellent client service?** " – Joan, CIO, Clark Hill
Being able to find the best examples of content to facilitate knowledge re-use 12 respondents mentioned this	• With so many documents being housed, it is difficult for organizations to stay on top of maintaining a repository of past work • Version control is a major time-saver for attorneys and their support staff	"So you can say, 'Of the 10 documents, this is the best.' Next time, if we have the same case, use this as an example, and I will flag this one document as … the template … **so that newcomers or future people can work in an easier way or [create] better matters.**" – Ada, Director of Document Management, Law firm

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Most-discussed **'Collaborate'** outcomes

MORE DISCUSSED

LESS DISCUSSED

COLLABORATE OUTCOME	ADDITIONAL INSIGHTS	SUPPORTING VERBATIM
Easily sharing files and documents with clients or external counsel, no matter what platform they are on 11 respondents mentioned this	• Interoperability with client platforms is key. The iManage and Microsoft partnership is viewed positively, as many customers are 'Microsoft shops'	"**Clients and lawyers want to, in a lot of cases, work on documents together**. And in iManage, it's easy to share documents with clients through links or even sending documents directly out of the DMS" – Respondent B, CIO, Law firm
Allowing teams to work virtually 'side by side' without being in the same place 10 respondents mentioned this	• Often described as 'co-authoring' • SharePoint is seen as a leader in this space, while co-authoring is often seen as a missed opportunity for iManage	**"[We often have] four or five different people making all these edits, and using that collaborative software allows you to do that**, instead of … sending it back and forth or saving different copies on network drive, that's just not efficient." – William, IT department leader, Asset Management Firm
Enabling flexible working paradigms, including remote and hybrid work 8 respondents mentioned this	• Many respondents think that remote work is here to stay • Respondents who already had cloud technology reported easier transitions to remote working	"Now we have been working from home for almost three years. You know the reason? **We didn't have any issues with users not being able to finish their work.** So now in our office, more than 60% of our users want to work from home, because they said, 'We can finish our work from home. We have iManage'" – Yul, IT Dept. Head, SSEK
Facilitating cross-device access to documents, optimized by device type, for better remote collaboration 7 respondents mentioned this	• Mobile access is key, as employees increasingly work and collaborate 'on the go' • IT departments want to enable users to work in the location and way that works best for them	"What [users] really care about is … **Is [the solution] easy to use and does it fit in their workflow?** … It needed to integrate … on multiple platforms, **whether they're on mobile devices, Windows devices or Mac, there had to be a strategy to handle all three of those** … it needed to be flexible enough to change as their practice changed and perform it within their workflow [so] we could embed it in the way that they worked." – Rick, CIO, Perkins Coie
Enabling better cross-office and cross-team collaboration and knowledge sharing 4 respondents mentioned this	• Respondents emphasized learning from other offices' wins and losses to prevent 're-inventing the wheel' for every case or problem • Organizations need to address different regulations in different geographies	"We wanted [our document management] streamlined so whatever they're looking at in New York, I could look at here in Florida. And vice versa. **It was getting everything all in one system, everybody streamlined, everybody on the same page."** – Respondent F, Director of Operations, Salon Company
Creating a positive employee experience that can **help the business attract the best talent and build the best cross-functional teams** 4 respondents mentioned this	• Respondents need to be able to attract the best talent with a positive employee experience, competitive pay and benefits, culture, and a reputation for client excellence to build strong and savvy teams	**"[We want to] be competitive in terms of talent.** We want to hire the best and we want our employees to feel like they are spending good quality time in their career." – Ada, Director of Document Management, Law firm "**We know that a happy employee and a productive employee means that they're going to deliver better services to our clients**." – Bill, CIO, Allens

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Most-discussed **'Protect'** outcomes

MORE DISCUSSED

LESS DISCUSSED

PROTECT OUTCOME	ADDITIONAL INSIGHTS	SUPPORTING VERBATIM
Protecting work from loss, due to natural disasters, device crashes, and deletion 10 respondents mentioned this	• Lost knowledge means redundant work, costing time, money, and significant regulatory risk • While most respondents have separate backup processes, they may not be able access files stored locally in an emergency, and the process for getting back online can take days	"Even now, we have around 4, 5, 6 million documents in [iManage]. **We've never lost anything**." – Chatsuda, IT Manager, Chandler MHM "I have to think about business continuity plans … or disaster recovery plans much differently now … **I'm reliant on iManage to help us in those kinds of scenarios**." – Joan, CIO, Clark Hill
Streamlining and de-risking compliance and regulatory audits 10 respondents mentioned this	• Respondents emphasized being able to quickly and efficiently provide regulators with proof of compliance, content for needed audits, etc. • Some customers noted iManage's ability to mitigate regulatory risk in a constantly-changing environment due to the pandemic or recent sanctions • This is very important in highly-regulated industries with frequent audits	"We've had some things come up with regulators, asking questions about, 'hey, how are you doing this with disclosures? … And we're looking at, **how can we enhance our systems to meet the regulatory needs.**" – Mike, Attorney, Prudential Insurance "**We've reduced overall risk by having a system of record** for all documents, and any client related emails are now meant to be saved into [it]" – Simon, Director of Legal Technology Solutions, Baker McKenzie
Managing the complexity of access management and need-to-know-access 7 respondents mentioned this	• It's important to have a way to easily check and restrict access • Intelligent access controls and alerts for unauthorized access attempts are in demand	"I'm hearing some great things about the Teams integration … Early on, we saw some people do it, and you had to manage a lot of different pieces, from data retention to security to multiple copies of documents. So that closer integration there for me is quite important … **I think there's a tighter integration coming with Security Policy Manager and Teams to manage who has access to a team, and so it's a one stop shop for managing security**." - Bill, CIO, Allens
Spending less time and mental energy worrying about security by passing responsibility on to a vendor 6 respondents mentioned this	• Many respondents said that with iManage handling security, they no longer have to worry about it	"For a small law firm, with a limited IT budget and a five-man team, six-man team with myself included, we are regularly chasing ghosts … **With all of the other things that we need to secure, having iManage take that aspect of it and secure our documents** and for me to be able to know that they're safe." – David, IT Director, Greenbaum, Rowe, Smith & Davis

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Most-discussed **'Innovate'** outcomes

MORE DISCUSSED

LESS DISCUSSED

INNOVATE OUTCOME	ADDITIONAL INSIGHTS	SUPPORTING VERBATIM
Saving time filing and processing documents by **integrating document management with other core document applications** 13 respondents mentioned this	• Users, especially younger users, do not do their work within iManage, but within a variety of document creation and editing applications • Integrating applications takes up IT time creating ad hoc solutions or working with third parties, and it takes up employee time having to manually save and file documents	"Because iManage is a core system, everybody wants their stuff to talk to iManage … We use InfoTrack to do a lot of our third-party searching and stuff. Again, people do the InfoTrack search and they get back an email with hundreds of documents and then they have to file it. They say, 'Well, **why can't InfoTrack just file it straight to iManage for us?' The answer is, 'Well, it can, but we need to sort that out.'** Those sorts of integrations are important for us as well." – Respondent A, Special Counsel (KM), Law firm
Creating a seamless employee experience by **integrating document management with core Microsoft applications** 12 respondents mentioned this	• Respondents want employees to be able to collaborate with clients or other business centers who may not use iManage • Teams integration was often mentioned as an exciting possibility	"One of the primary challenges that we face with any of the legal document management systems is how do you move work from where people do the work or engage with the work into its final disposition... **The things that I'm most looking forward to is the improved integration with the Microsoft stack,** particularly sort of beginning to leverage Microsoft's ability with Office 365, co-authoring and sharing instead of having that hosted separately in the iManage client" – Rick, CIO, Perkins Coie
Moving to the cloud to **quickly access new updates and features** 2 respondents mentioned this	• This includes saving time and IT effort on manual upgrades and deployment so that they can focus on training users, automating processes, and getting the most out of tools	"I'll be moving towards more SaaS solutions to **remove the wasted effort on upgrades and management** to start delivering more value out of the applications themselves." – Bill, CIO, Allens "They really are implementing new functionality within iManage … **We were hoping it would be evergreen. We wouldn't have to keep updating, it would just flow through the cloud system.** That was one of the reasons [for migrating to] the cloud." – Andrea, FVP, Commonwealth Bank of Australia

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Successful pillar-specific outcomes enable core, overarching outcomes

For example, attracting and retaining talent and improved search can enable organizations to build a strong reputation or save IT team time.

MORE DISCUSSED

LESS DISCUSSED

OUTCOME	ADDITIONAL INSIGHTS	SUPPORTING VERBATIM
Creating frictionless employee experiences by providing **pleasing, easy-to-use user interfaces** 11 respondents mentioned this	• This ladders up to creating a positive employee experience, cutting down on the frustration felt during day-to-day tasks	"The user interface is more intuitive and less clicks to do things than what they had before. **I think that really helped them to embrace [iManage].** It didn't take much for them to embrace iManage and to fall in love with it once they got it" - Respondent B, CIO, Law firm
Saving money throughout the business, on IT adoption, deployment, and maintenance 5 respondents mentioned this	• Respondents looked at total return on investment when weighing solutions, factoring in efficiency gains and cost of maintenance	"Cost of management – longer-term, **we thought [iManage would be] more cost effective**" – Shahid, Principal member of technical staff, Telecommunications
Saving IT staff time, so they can focus on higher level, more strategic tasks 4 respondents mentioned this	• Without having to spend time on upgrades, maintenance and security, IT teams can focus on training and supporting workflow automation	"While using [the Oracle DMS], it was a very hard day for [the IT team] … very, very tough because **I needed to be present in the office. I could see maybe 15 hours a day or sometimes 19 hours a day to keep the system running**" – Yul, IT Dept. Head, SSEK
Improving stability and business resiliency 4 respondents mentioned this	• Moving to the cloud can help improve system reliability and avoid mass outages	"As long as we [have been using] iManage**, we haven't had a problem, a mass problem** …[where] the system cannot be used" – Yul, IT Dept. Head, SSEK
Supporting non-IT support staff with tools that make their jobs easier 3 respondents mentioned this	• Email management, automation, and faster document creation all make it easier for paralegals, secretaries, and other support staff to do their jobs	"[iManage] is the answer to that, where their **paralegals, and secretaries, and so forth, can produce and turn around product quickly enough for [lawyers] to be responsive**, and feel good about themselves." – Ted, Director of Solutions Consulting, Innovative Computer Systems

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Outcomes key takeaways:

INSIGHT	OPPORTUNITY
Most customers and non-customers measure adoption and use, but very few have formal KPIs that illustrate the impact of tools on outcomes. This lack of quantified outcomes makes it more difficult for customers to validate the purchase decision to adopt and make arguments for upgrades and enhancements.	**Support decision makers in creating and tracking meaningful KPIs around its solutions.** This would drive goodwill, but also provide proof points that DMs need to show the value of the iManage partnership.
When compared to other pillars, 'Innovate' and 'Create' outcomes were often discussed as having greater ROI. 'Innovate' and 'Create' outcomes were also more likely to be pleasant surprises, while 'Protect' and 'Collaborate' outcomes were often expected and straightforward.	**Bring 'Create' and 'Innovate' pillars to life through the outcomes they enable.** These pillars are more abstract and could be better defined through stories and statistics about positive outcomes, especially as it relates to making better business decisions and freeing up employees to focus on what matter.
While most outcomes discussed fell neatly into iManage's four messaging pillars, **17% of outcomes did not fit neatly into a single theme, but instead were a result of all four pillars working together for a powerful business outcome.**	**Focus on overarching outcomes that pillar-specific outcomes, all together, can enable,** from winning more cases to retaining more clients to attracting the best talent.

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Customer deep dives

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Bringing the taxonomy to life

A real customer's example

Goals

- Providing superior client service – attentive, fast, efficient
- Building trust with customers and a reputation for excellence
- Protecting clients and the business from risk, esp. security risk
- Centralizing the business and remove knowledge silos

Strategies

- Left previous document management vendor (eDocs) in favor of iManage. Sought a tool that was easy to use, that streamlines workflows, hybrid cloud capabilities, integrates well with current stack, and that has robust security.
- Moved many workflows and infrastructure into the cloud
- Adopted a proactive security policy and tools that support that policy (including iManage) and instituting a Global Security Team
- Campaigns and user tracking analysis to improve iManage adoption

Outcomes

- Improving employee digital experiences, leading to greater employee satisfaction and retention (and retention of expertise)
- Creating a single hub for collective intelligence (vs. the previous state of 7 different libraries)
- Significantly "reduced the firms security risk level"

Baker McKenzie.

Simon at Baker McKinsey

Director of Legal Technology Solutions

"I'm responsible for any solutions that we buy or build, or that relate directly to legal work"

In their own words…

"[***Now we can] retain our talent, and we have lawyers who are enjoying their job*** and working with our clients in a way where they can tell they're not hating their job"

"Knowledge management [is the most important outcome] definitely….being able to find previous work content and provide insights into the data. And then being able to search across the whole document repository, globally as well … ***having the ability to pull up a document at a client's request any time of day or night, and even on a mobile device, makes us very responsive to client needs***."

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Bringing the taxonomy to life

A real customer's example

Goals

- Driving greater employee efficiency to enable employees to focus on higher level tasks , which will in turn drive greater job satisfaction and talent retention
- To be lean and drive greater profitability through efficiency gains and repurposing of work and knowledge, including through reducing growth in head count

Strategies

- Adopting iManage in the cloud and creating policies and change management programs that drove 90-95% adoption. Also adopted iManage's Compliance Manager.
- Began to leverage intelligent search and other intelligent solutions, like an intelligent eDiscovery tool, to make finding documents easier

Outcomes

- Made employee experience more enjoyable, frictionless, and collaborative
- Reduced reliance on IT, leading to greater productivity and profitability
- Creating a single hub for collective intelligence (vs. the previous state of 9+ different libraries)

Charter COMMUNICATIONS

Dan at Charter Communications

VP of Legal Operations

"I manage the applications or own the applications that run solely within the legal department, like iManage in our case"

In their own words…

"I think there was nine different types of file electronic document organization systems [before iManage], plus a whole host of independent solutions that people were using. *To have a consolidated location for our content for us at the time was revolutionary."*

"[We gained] a common understanding of the content that we have and where it's stored so people can access it when they need to."

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Bringing the taxonomy to life

A real customer's example

Goals

- Provide comprehensive advice for all of their clients' legal needs
- Increase the speed of response to clients
- Improve document security, especially protecting against ransomware attacks that could shut down operations

Strategies

- Migrated from an on-premises Oracle document management solution to iManage in the cloud
- Planning on migrating almost everything to the cloud
- Currently looking for a solution to manage transactions, that has a better front end than Closing Folders
- Also looking for a project management solution

Outcomes

- Users want to and are able to work from home. More than 60% of employees want to remain remote because they are able to complete all work.
- Employees are able to find documents, regardless of document type
- Yul and other IT employees spend significantly less time in the office managing servers and applications
- There have been no issues with stability, outages, etc
- Employees can access iManage from anywhere, on any device

SSEK
Indonesian Legal Consultants

Yul at SSEK

IT Department Head

"My role is to make sure all the IT things at SSEK are running properly to support our business."

In their own words…

"Now we have been working from home for almost three years. You know the reason? We didn't have any issues with users not being able to finish their work. So now in our office, more than 60% of our users want to work from home, because they said, 'We can finish our work from home. We have iManage'"

"I don't hear [complaints about search] anymore. Every time the user tries to look for something, they will receive the document, [whether] it's email, it's PDFs, it's Word documents, Excel documents, whatever documents - as long as the criteria is matched with the document, the document will come up."

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iManage perceptions

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iManage is often seen as indispensable once adopted.

Customers strongly believe that they would not be able to function and meet client obligations and expectations without iManage.

"Without iManage, my business would not be able to…"

"We wouldn't be able to operate. *We will not be able to operate without FileSite. It's as simple as that."*

– Gary, Chief Digital Officer, Minter Ellison

"Function. *At this point, the firm has been using iManage in excess of a dozen years … iManage has become their go-to for literally everything"*

– David, IT Director, Greenbaum, Rowe, Smith & Davis

"Serve our clients in an effective way, and be able to meet our client and regulatory obligations."

– Simon, Director of Legal Technology Solution, Baker McKenzie

"Meet client obligations. *Without iManage, my department would not be able to build playbooks and best practices or share knowledge."*

– Rick, CIO, Perkins Coie

"Efficiently run a matter file. *[Without iManage, my IT department would never be able to] control information flows and be comfortable on security"*

– Bill, CIO, Allens

"We'd never be able to perform efficiently and effectively"

– Respondent C, GM of Strategy and Ops, Bank

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What makes iManage different or better?

Specializes in legal	*"There are very few document management systems that are catered for the legal industry. So there definitely iManage has an advantage." – Darren, Head of IT, Allen and Gledhill* *"iManage continues to add on to the suite of how it approaches the law firm business, until it's self-sustaining for the law firm to know that they can get whatever they need by using iManage" – Ted, Dir. of Solutions Consulting, ICS*
Large market share	*"It's kind of nice to be on the same track as other firms in your area that you normally work with. So iManage was kind of a no brainer here, too, because we work with a lot of [other] firms and implementing iManage Share gives that outside collaboration that we were lacking." – Respondent D, Paralegal, Law firm*
Advanced security they can be confident in	*"The threat manager that iManage has is so far above and beyond what we had at NetDocuments … The fact of the matter is [having] that control and that knowledge is significant for an IP firm" – Kevin, IT Director, Adsero IP* *"I think iManage are on their game in the security space. They give me great confidence that everything we're putting in has a deep security focus." – Gary, Chief Digital Officer, Minter Ellison*
Robust tools that offer a wide range of capabilities	*"Technologically they've kept up, they've invested, they have very, very bright people, and they have pulled in the best in the business … I still believe that they have the best product in the industry, and it's actually that the difference has widened, it's gotten better" – Michael, CEO and Founder, ICS*
Superior ease of use	*"I think the [iManage] user experience is easy and superior. It's intuitive. It's drop and drag. It's easy for people to use." – Respondent C, GM of Strategy and Ops, Bank*
iManage listens to customers	*"So, they do listen. They're open to having conversations with people. I can call anybody at iManage" – Doug, CIO, Mayer Brown.* *"At an executive level, I feel like we've got support there" – Joan, CIO, Clark Hill*
Microsoft integration enables greater collaboration and productivity	*"I'm hearing some great things about the Teams integration. So for me, that's key is a lot of the corporations in the world are already using teams or in bed with teams as a collaboration platform. So the fact that iManage has that strong alignment now with Microsoft is great." – Bill, CIO, Allens*
Upgraded user experience that extends to mobile devices	*"I see that the new [FileSite] tool is really going to give us that 2020+ look and feel, and that's going to be a great thing for our users across all of their devices, whether it's an iPad or an iPhone or on their desktop." – Gary, Chief Digital Officer, Minter Ellison*

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Observations from partners

1. **Partners were more likely to focus on cost-oriented goals and outcomes.** Improving profitability was one of the most-discussed client business goals among partners, and they over-indexed on saving money on technology and maximizing billable hours as outcomes.

2. **Partners focused the least on outcomes in Collaborate.** Co-authorship was rarely mentioned among partners, who instead focused on core cross-pillar outcomes and improving productivity.

3. **Partners did not focus on measuring the outcomes their clients experience with iManage**. They expressed that not getting complaints is an outcome in itself or that they don't think their clients want to measure goals.

4. **Some partners focused on their relationship with iManage,** noting recent challenges such as feeling like iManage is neglecting partner relationships and success or feeling pitted against other partners or iManage's sales team by iManage.

Recommendations and conclusions

Adoption and change management can be a barrier to realizing positive outcomes.

Deployment can be daunting, preventing organizations from beginning the evaluation and adoption journey. There is a fear that businesses will have to re-work all of their existing processes, taking them out of commission.

*"The [Work 10 upgrade] project was put on hold … because many users still work outside the office and **it's not easy for IT staff to install software on every machine at once**. We also have to arrange for training ... " – Chatsuda, IT Manager, Chandler MHM*

A lack of understanding, training, and formal change management can negatively affect user adoption rates. Implementation setbacks can also have long-lasting negative impacts on user perceptions of the tool, contributing to low usage.

*"**Trying to improve adoption rates is going to be difficult, because when we rolled [iManage] out, we had a number of issues** … Serious cybersecurity controls hampered some of the functionality of iManage … People are having connectivity issues which is unfortunate and it just loses confidence in the system … That hasn't really helped with the adoption rates, unfortunately" – Andrea, FVP, Commonwealth Bank of Australia*

Training cannot be 'one and done'. Businesses need help facilitating ongoing learning that teaches users about new features and tips to optimize the tool.

*"We've had to provide not just the typical training where we've got consultants in to take them through it but we've actually had to do one-on-one training sessions with them … **We've got lots going out in engagement via email, via Yammer, via tips and tricks Tuesdays, giving them all the different tips** on how to use the functionality, lots of quick reference guides" – Andrea, FVP, Commonwealth Bank of Australia*

This drives **a need at smaller and mid-size organizations for a vendor or partner that has strong change management and training support**, from formal training to large library resources to in-tool nudges and micro-learning.

*"**One thing that [the implementation partner has] done really well is the change management support**. We've had a dedicated person … To be honest, we haven't quite worked out … whether we do it 100% ourselves in conjunction with iManage or with Morae, their partner. End of the day, it's probably not iManage ... We'll probably have to build up that capability internally." – Respondent C, GM of Strategy and Ops, Bank*

The adoption and **change management journey is easier when the old system was really struggling** and at larger firms that may have a dedicated training group.

*"**It didn't take much for [users] to embrace iManage** and to fall in love with it … because it was a vast improvement over what they had before." – Respondent B, CIO, Law firm*

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Key statistics about iManage customers

Note: We did **not** explicitly ask respondents whether iManage enables specific outcomes (e.g. “Does iManage enable you to XX?”). The numbers below indicate the outcomes that were top of mind when respondents answered other questions about outcomes they prioritize, and whether iManage delivers on them (e.g. “What outcomes do you want a document management system to help drive?”)

Pillar	Statistic
CREATE	**50%** of customers organically mentioned that iManage enables **faster, easier document search**
	50% of customers organically mentioned that iManage helped them create **a single source of truth** for their documents
COLLABORATE	**70%** of customers organically mentioned that iManage enables them to improve **collaboration**
	25% of customers organically mentioned that iManage enables them to **collaborate with clients**
	25% of customers organically mentioned that iManage enables **remote working**
PROTECT	**75%** of customers organically mentioned that iManage enables them to **protect** their documents
	30% of customers organically mentioned that iManage helps them **prevent document and information loss**
	20% of customers organically mentioned that iManage helps **simplify access management**
INNOVATE	**35%** of customers organically mentioned that iManage enables them to **integrate** their document solutions
Core outcomes	**25%** of customers organically mentioned that iManage offers a **modern, easy-to-use interface**

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Summary and recommendations

Decision Makers are looking for…

…Help thinking big

Decision Makers and leaders need help reframing and elevating document management within the business – from 'storing and sharing' to something more aspirational.

…Specificity in outcomes discussed and promoted

Businesses need to understand specifically what broad statements like 'greater productivity' or 'better collaboration' means for their business goals.

….Proving the value of an innovative document management system

Business need expert help in creating and measuring these KPIs so they can prove the value of a solution to the rest of the business.

….A true partner in change management and adoption.

Businesses need help navigating the complexities of change management and adoption, directly after deployment and ongoing.

iManage can help by…

…Focus on the overarching and powerful business outcomes that a central document management solution can enable.

Creating frictionless employee experiences, increasing billable hours and profitability, and minimizing the IT burden are all top of mind,

…Bring business success outcomes to life through case studies and testimonials with quantified ROI.

Provide a wide library of case studies, that feature hard numbers that tie to overarching business goals – i.e., instead of 'greater productivity', quantify time saved, increase in billable hours, etc.

…Providing a strong POV on how to measure the success and resources to enable that measurement.

Post-sales content about what KPIs to measure and how to measure them, as well as tools to help with those measurements, would be a major differentiator.

…Provide a variety of change management resources in the near and long term, to optimize use of the tool.

iManage should consider….

- Case studies highlighting adoption and training best practices from other clients
- Change management consultancy services
- Webinars and hands on training that enable dynamic, engaging training
- In-tool training and educational nudges to encourage further exploration of the tool

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Summary and recommendations continued

Decision Makers are looking for…

....Confidence that they can weather the next business emergency.

From the next global pandemic to natural disasters to tool and database outages, Decision Makers want to ensure they have innovative and flexible tools to enable business continuity and knowledge access.

…Help re-framing the security conversation around higher-level outcomes.

Businesses need help understanding how security innovations enable higher level outcomes, to help position it as more than just ‘foundational’.

...Access to security and product innovation for better scalability and growth.

Businesses often do not have the resources to implement the latest security measures or desired features and rely on cloud solutions to continuously innovate without IT team effort.

iManage can help by…

…Emphasize the constantly evolving iManage roadmap and increase non-customer transparency into that roadmap.

Focus on how iManage’s dedication to innovation and to best-in-class partnerships will offer resiliency, so that they can adapt to whatever the market throws at them.

…Focus on the overarching business outcomes that better security enables.

From a frictionless remote employee experience to improved collaboration across offices, show what is possible when security and access management is an enabler and not a barrier.

…Heavily promote the benefits of iManage cloud adoption.

Focus on increased scalability and easy and near instant access to new features through cloud updates and interim product releases.

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