iManage
Making knowledge work

BOND, SCHOENECK & KING OPT FOR HOLISTIC LIFECYCLE OF DATA

Keeping close to 300 applications throughout practice groups without jeopardizing safety

BOND SCHOENECK & KING ATTORNEYS

Industry:
- Legal

Headquarters:
- New York, US

iManage footprint:
- iManage Work 10 in the Cloud
- iManage Threat Manager
- iManage Security Policy Manager

Disenchanted with their existing platform, Bond, Schoeneck & King didn't need much convincing to implement something new. Data security, responsiveness, and ease of client file access and filing were just a few of the outcomes desired in implementing a new document management system. The business case for iManage was its ability to pull together all the data about a matter and oversee the complete lifecycle of that data while securing, governing, and even disposing of it in due course through records management. With these benefits self-evident, the firm did not hesitate to replace their existing platform. iManage facilitated collaboration throughout the company and made a real difference to people working remotely, in separate offices, and different states. But the top benefits for the firm in the switch to iManage are ease of use, peace of mind, and the gift of time.

Headquartered in New York, Bond, Schoeneck & King have a history that spans more than 100 years. A full-service law firm, they cover more than 20 practice areas and 10 industry groups, and their 275 attorneys work from offices in five different states.

> " It's easy to search, it's easy to navigate. All of it just makes it so easy for any attorney and any assistant to find what they're looking for.
>
> **Joe Fousek**
> Chief Information Officer, Bond, Schoeneck & King

❝ ❞

iManage is the Cadillac standard for law firms and document management.

Joe Fousek
Chief Information Officer,
Bond, Schoeneck & King

The challenge

Secure email management and meeting client expectations

Recognizing the shortfalls of their existing platform, Bond, Schoeneck & King knew that one of the top features they wanted was email filing, as theirs was very cumbersome. For the sake of their attorneys and clients, they needed to get that right.

"I think every firm struggles with email management," said Joe Fousek, Chief Information Officer at Bond, Schoeneck & King. "Especially when you have an attorney that leaves the firm. If they haven't been properly saving their email into the document management system, then somebody else in the firm inherits a mess."

Data security was another important area for upgrade. Bond, Schoeneck & King were running close to 300 applications due to all their practice groups having individual programs. Data is coming in and out of the firm constantly through email, remote access, and mobile access. With offices across several states and filing systems that have multiple points of access, security risks are a given and a threat that any law firm wants to prevent. As stewards of client data, intellectual property, and the firm's own reputation, the firm must ensure advanced security measures.

Fousek commented: "Maintaining security in a law firm is extremely challenging because all our clients have different expectations. And we have to meet or exceed those expectations, regardless of whether they're low, high, or strange."

The solution

Email filing issues a distant memory

"We were having so many problems with the current DMS, which was also outdated," said Fousek, "that it was pretty easy to get the firm on board with implementing a new document management system. One of the main reasons I selected iManage was the completeness of their strategy, their vision for pulling together all the data about a matter and managing the complete lifecycle of that data," he added. "Right from when it comes in the door, all the way through, the data is governed, secured, and eventually even disposed of appropriately through records management. iManage looks at matter data more holistically than just managing a collection of documents that you create."

Conversion to iManage was planned for early 2020 and the pandemic threatened to disrupt it. Yet despite the ban on travel, Fousek was determined to go ahead with the plan. All the training was successfully accomplished virtually, saving the firm a significant amount of money. Bond, Schoeneck & King offered recorded sessions and e-learning opportunities to help facilitate quick staff adoption of iManage. And after the first three months, the firm was able to focus on reinforcement and teaching more in-depth topics such as advanced search and complex files with multiple documents.

The email filing issues are now a distant memory. "Business today gets transacted more on email than anything else. So being able to save all that data and have an electronic file for all the communication, even between subsets of people in various places, is probably the most important, but hidden, benefit we found," Fousek explained. "And it's so simple to file meta-related emails in iManage. Some attorneys use the filing toolbar in Outlook almost exclusively for filing email, because of the way it predicts what matter something is related to. This functionality is quite brilliant."

iManage data protection and security provides in-built peace of mind. And according to Fousek, iManage offers a lot of flexibility in this area. It logs anybody who's accessed, looked at, or edited documents and filed emails. It's also possible to be very granular by, for example, setting up a matter as sensitive and making it necessary for people to be added to it to see that the workspace even exists. "You can apply extra controls right at the document level," said Fousek. "You can either secure the whole matter, a folder, or just one document. The possibilities are endless."

## Business outcomes

Adapting to the changed environment

Initially, there was some resistance to using a new system. Some people wanted to continue using shared drives, but saving emails to a shared drive is cumbersome, and the efficiency of the email filing functionality quickly overcame any opposition. What's more, iManage really made a difference with people working remotely, in separate offices, and different states. "Instead of having a separate server in each office, there is just one system and no matter where you're working, you're saving it to the electronic file for that matter, greatly facilitating collaboration throughout the company," said Fousek.

Ease of use is the top benefit for the firm, with the learning curve being very low. It's a game changer for lawyers to be able to have all their documents, matter-related emails, and all other related content in one spot where it's easy to find.

And the firm's data perimeter is very secure. "iManage can block out everything in the world except for the specific traffic that's authenticated through the active directory," explained Fousek. "They know how to protect their system. They have plenty of security people and it's a lot easier for iManage to protect the data than it is for me."

In addition to ease of use and peace of mind, iManage has also given the gift of time to many of the firm's employees. For one thing, the multiple servers Bond, Schoeneck & King used to use are gone, along with maintenance, security, patching, redundancy, business continuity, and disaster recovery measures this hardware required. Fousek commented: "Just administering the system itself, making sure that you have the appropriate applications, performing patches and upgrades takes so much of your staff's time. But you free it up by moving to the iManage Cloud."

"
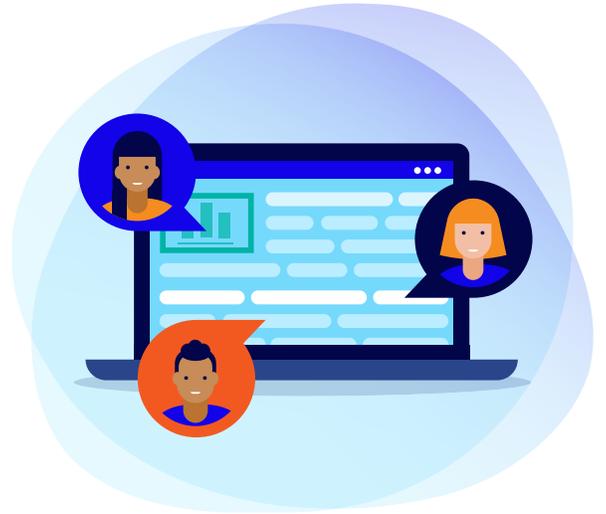
I'll never go back to in-house communication servers and storage. It's just too difficult and complicated to maintain. Just turn it all over to iManage.

Joe Fousek
Chief Information Officer, Bond, Schoeneck & King
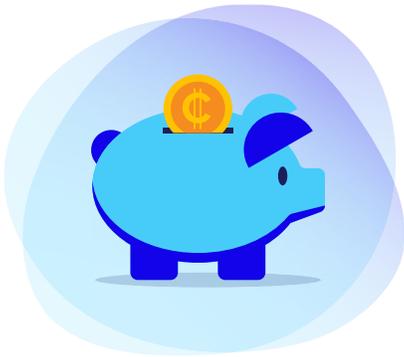
Looking ahead

Data at Bond, Schoeneck & King is now secure and easy to access. "The investments that iManage have made in their support infrastructure so that they can be responsive when you're running into issues is incredible," said Fousek. "iManage is the Cadillac standard for law firms and document management."

And confident behind the wheel, Bond, Schoeneck & King can safely navigate any obstacles to knowledge management that the firm encounters, while continuing to earn their clients' trust for the next hundred years.

About iManage™

iManage is the company dedicated to Making Knowledge Work™. Its intelligent, cloud-enabled, secure knowledge work platform enables organizations to uncover and activate the knowledge that exists inside their business content and communications. Advanced Artificial Intelligence and powerful document and email management create connections across data, systems, and people while leveraging the context of organizational content to fuel deep insights, informed business decisions, and collaboration. Underpinned by best of breed security, sophisticated workflows and governance approaches, iManage has earned its place as the industry standard through continually innovating to solve the most complex professional challenges and enabling better business outcomes for over one million professionals across 65+ countries. Visit www.imanage.com to learn more.

Blog: imanage.com/blog