iManage
Making knowledge work

MCCARTHY TÉTRAULT EMPOWERS LAWYERS TO WORK FASTER AND SMARTER WITH iMANAGE IN THE CLOUD

Digital transformation accelerates pace of work and aligns with firm's strategic goals

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Industry:

- Legal

iManage footprint:

- iManage Work 10 in the Cloud
- iManage Closing Folders
- iManage Threat Manager
- iManage Insight

About McCarthy Tétrault

McCarthy Tétrault is a Canadian law firm that offers a full suite of legal and business solutions to clients in Canada and around the world. It delivers integrated business, litigation, tax, real property, and labor and employment solutions through offices in Vancouver, Calgary, Toronto, Montréal, Québec City, New York and London.

To achieve its goal of offering unique, industry-leading services to clients, McCarthy Tétrault invests in its people and technology. When its document management solution was causing a poor user experience, suffering from performance issues, and hindering productivity, it rolled out iManage in the Cloud and iManage Threat Manager in addition to iManage Closing Folders, which was implemented in 2017. Lawyers can now enjoy a feature-rich experience, faster searches, and an intuitive user interface, which enables a greater focus on innovation in legal practices. Meanwhile, the client service delivery team can prioritize, resulting in industry-leading client services.

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Kathleen Hogan
Senior Director, Knowledge and Data Insights at McCarthy Tétrault

- Improves staff productivity and efficiency
- Enhances security and data loss prevention
- Supports growth

The Business Challenge

Performance issues hinder productivity

To become Canada's leading law firm for public and private enterprises, McCarthy Tétrault defined five strategic initiatives in order to deliver the best outcomes for clients:

- Develop industry-specific expertise to offer relevant, timely advice to clients
- Provide seamless services in Canada and beyond
- Deepen client relationships
- Innovate on service delivery and business offerings
- Invest in people

At the center of each of these initiatives, is the need to have fast, secure access to all client documents from anywhere. To achieve this, the firm needed to replace its legacy document management system and put systems in place to drive greater consistency.

"Our existing solution had performance issues that made it difficult for staff working remotely to access everything they needed, but staff in the office also found it challenging to navigate and were frustrated with how long it took to perform searches," explains Kathleen Hogan, Senior Director, Knowledge and Data Insights at McCarthy Tétrault.

In addition, many people did not have time to save emails through the existing manual drag-and-drop process. With key information contained in email, this slowed down collaboration and made it more difficult for people to access comprehensive information relating to a matter. "We had different naming conventions between different teams, which was causing additional complexity," confirms Hogan. "We needed a more consistent approach to document management across the whole enterprise."

Solution

Creating excitement around a central work management platform

McCarthy Tétrault began looking for a cloud-first solution. While Hogan had used iManage in previous roles and liked its powerful search and intuitive user interface, the firm was also impressed with the dedication shown by the iManage team and how well the company's corporate values of investing in innovation and people matched its own.

"iManage is a great partner to us. The team brings a fresh perspective and will proactively advise us on design changes or enhancements. That's the kind of relationship we want, not someone who lets us take unnecessary risks or is too scared to tell us we've made a bad decision," comments Hogan.

The first phase, in 2020, was to design a minimum viable product on iManage Work 10 in the Cloud. The design teams understood what success would look like, and used a "configure, not customize" approach to deliver a platform that solved pain points but could also be enhanced in the future. The team also rolled out the iManage iOS mobile app to give users access to information on the go. Data was migrated from the previous solution into the iManage Cloud.

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Our goal was to make people happier, and we've absolutely achieved that with iManage.

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The firm worked closely with focus groups of internal users to streamline the deployment and offered short training sessions ahead of the launch date. "We invested a lot in change management and it really paid off. Attendance for training sessions was around 80% and those who couldn't make it got up to speed on iManage really quickly by themselves," recalls Hogan.

Champions were also nominated to encourage peer-to-peer learning, and everyone can access a knowledge bank of articles for self-service access to support.

"We introduced a whole new mindset with our iManage rollout, and it's been a huge success. To have 1,700 people all happily using iManage is huge!" comments Matthew Peters, National Innovation Lead at McCarthy Tétrault.

A culture of continuous improvement

To make sure its new work management platform is supporting the team in the best possible way, the team captures feedback and identifies common pain points to resolve as part of its continuous innovation cycle.

"People are always nervous about adopting a new way of doing things, but we always listen to their concerns and there's often a solution in iManage," explains Peters. "For example, after experiencing slow searches on our old platform, people liked to save their most used files on their desktop. I showed them how to use 'my favorites' in iManage instead, and it's been better for everyone. People can find things quickly without compromising on security."

While fee earners, such as lawyers and paralegals, use the platform to support client-facing work, other groups within McCarthy Tétrault also use iManage. The Client Service Delivery team is dedicated to process improvement and enhancing the user and client experience. In addition to using iManage as their single source of truth, they identified where iManage could be enhanced to enable greater mobility and safeguard business continuity during the pandemic.

Today, the firm is also using iManage Threat Manager to monitor user adoption and compliance. The solution produces compliance reports and gives the team greater insight into behavioral analytics, which is key for data loss prevention.

"We deal with a lot of highly classified and confidential data, so we're subject to frequent client audits. We collaborated with the iManage team to create a data loss prevention strategy based on iManage Threat Manager," explains Peters. "We established baselines, and we're alerted to any unusual behavior or risks that sit outside of those parameters. It has increased security and compliance across our whole environment."

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National Innovation Lead at McCarthy Tétrault

Business Outcomes

Making people happier

Since moving to iManage in the Cloud, performance issues are a thing of the past. Users have consistent access to highly available data from anywhere. "Our goal was to make people happier, and we've absolutely achieved that with iManage," adds Hogan.

Fee earners and other firm members can now focus on innovation in line with the firm's business goals, including identifying areas to improve the platform and rolling out more functionality.

"Our legacy system took up a huge amount of time and resources just to keep the lights on. Now, we can get more value from our IT team and leverage data analytics to make changes with the greatest impact on productivity," said Hogan.

With an excellent search function and the platform's user-friendly interface, staff are more efficient than ever. Lawyers are also keeping more comprehensive records, which has streamlined collaboration and accelerated the pace of work.

"Documents and email are at the core of everything we do. Users don't have to stop and think about where to file or find something anymore – it sounds small, but multiplied by hundreds of emails a day that's huge," confirms Peters. "With iManage, we're delivering on our brand promise of being a leading law firm with the best tools and brightest minds."

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