

# CASE STUDY: TOP 10 LAW FIRM MOVES TO iMANAGE WITH PHOENIX

## Allens breaks new ground implementing iManage and RAVN for Document Management



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Allens is one of Australia's Top 10 commercial law firms, with over 1400 legal and business professionals across eight offices in Australia and Asia. Its global alliance with Linklaters enables the firm to deliver an integrated service to a growing international client base which includes 55 of the world's top 100 companies.

### The Challenge

#### A New Document Management System

Allens' lawyers and business professionals have long relied on their on-premises document management system (DMS) and appreciate its value. But after almost 20 years, the system had become outdated, inflexible, nearing its end of life, and the team had even lost confidence in some of the systems' functions. After an extensive analysis, Allens' CIO, Bill Tanner, decided to migrate Allens' large international user base to a new platform.

"While we didn't need to reinforce why we required a DMS or email filing, we were looking for a state-of-the-art tool, with a consistent, user-friendly interface, that would support the latest best practices and help us extract further value from our resources."

Recognising that replacing one of the firm's core systems was a business-critical undertaking, Tanner brought in Phoenix Business Solutions, a Morae Global Corporation company, who specialises in large and complex digital transformation projects.

### The Solution

Morae's Phoenix group has proven methodologies for each milestone of the project, including planning and design through technical implementation, data migration, systems and process integration and support.

"We chose Phoenix as our strategic implementation partner and involved them from the outset. They understood our requirements and we benefited from their extensive experience in successfully managing these kinds of large-scale implementations."

Extensive market analysis and a detailed RFP process identified iManage as the best solution for Allens' requirements, including a combination of advanced functionality and a sharp focus on the legal sector.

"Many lawyers and IT staff joining the firm had previously used iManage and we were able to leverage their insights to help our decision-making process," explained Tanner, adding that familiarity with one of the firm's core systems would be an advantage, ensuring the majority of lateral hires could hit the ground running, unlike with their previous system.



Bill Tanner  
CIO, Allens

Allens < >  
Linklaters

### Planning a Large Scale Data Migration

The **Allens** project was one of the largest data migrations in the southern hemisphere, involving around 100 million documents.

Data migration on a major scale can be a business risk for any knowledge business. **Allens** was able to mitigate this risk with the support of **Phoenix**'s skill and experience, particularly their data migration experts with extensive knowledge working with legacy DM systems.

"Once we selected iManage, **Phoenix** created a plan, which enabled us to begin resourcing the project, creating rules and setting milestones."

The first phase involved migration of 60 million documents into 550,000 digital matters. This comprised over 20 terabytes of data from eight offices. Ten legacy databases were reduced to two and 1100 laptops were reimaged in a single weekend to make the roll-out happen in a short timeframe. The **Phoenix** team were able to capture and interpret the unique migration requirements and manage the process from development right through to implementation and validation with a high level of accuracy, which gave the **Allens**' team a lot of confidence.

For such a large, complex project, the timeframe was tight. Tanner explained that this scale of project would usually take at least 18 months, but **Allens**' highly focused team supported by **Phoenix**'s deep expertise and experience were able to complete the project, from procurement to go live, in less than a year.

### Going Live and Beyond

After the system had been tested thoroughly by a pilot group of power users, **Allens** and **Phoenix** led a 'big bang' implementation, as Tanner described it, for the firm's Australian offices over a single weekend. The following Monday morning, all users had brand new laptops, a new DMS, an upgraded Office Productivity Suite and access to all their documents and emails.

**Morae's Phoenix group** played a significant role in managing the transition: "**Phoenix** trained the IT group and ran role-based training prior to the launch weekend. Immediately after the go-live, the entire IT group walked the floors to ensure everyone could do their work using the new system. **Phoenix** support staff and engineers remained on-site for the first week after go-live to provide deeper product and technical expertise as needed. They also implemented a clear process for logging issues and making sure those issues were addressed straight away," added Tanner.

Timing was critical. The **Phoenix** and **Allens** teams worked diligently together to meet a November go-live deadline. Had this not been met, the go-live would have been delayed until the following February.

Due to the volume of data to be migrated, **Phoenix** identified that **Allens** would benefit from implementing iManage RAVN, an artificial intelligence tool to identify information, determine the structure of the documents and classify the data for improved future search outcomes. "**Allens** was breaking new ground," says Tanner, who added, "The iManage RAVN team hadn't designed configurations for a site of our size, so we leveraged all the expertise and experience from **Phoenix** and iManage. We received excellent advice for applying RAVN search indexing to the core iManage Work system". Despite the large scale challenge, **Phoenix** and the iManage team were able to implement a stable and reliable search platform servicing over 1400 professionals. **Allens** also became the world's first site running iManage 10 at the client and RAVN for search.

### Remarkable Results

The initial results included faster, more intuitive search/usability and better access to content across the board. The new DMS using the Work 10 interface even provided a faster experience for **Allens**' remote offices, who previously suffered from bandwidth issues.

"In our old DMS system, we had to replicate our data into a data centre based in Asia for our Asian offices, but now with the new system, they are connecting to our Australian data centre and these teams have experienced a noticeable performance improvement. The iManage architecture facilitates flexible working and it has helped to streamline consistent email management practices throughout the firm. Because we chose a browser interface, users benefit from the same experience using iManage on their mobile phone as they do on their laptop, which reinforces best practices across the board."

As an expansion of the solution, **Allens** rolled out Security Policy Manager (SPM), iManage's ethical wall solution, a tool used to secure matters and create boundaries between them. "During our first year with iManage, more than half our support calls related to managing confidential matter requests and group changes. Following the roll-out of SPM, those calls zeroed out as partners or team compliance officers are able to modify the security of matters themselves, rather than contacting the



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Support team, because the user experience is so straightforward and well designed. SPM reduces the time it takes to implement an ethical wall and synchronises policy across the DMS and the practice management system in real time. This is an important move forward in terms of productivity, security and risk mitigation.”

Phoenix has been a 'perfect fit' for Allens and the technical teams quickly developed a mutual understanding and respect for one another, which has led to a stronger sense of team and closer collaboration. “We were able to allocate work more effectively and people would jump in and got the job done. We had productive conversations and advised each other on the best approaches. We understood each other’s perspectives and worked together towards common goals. The speed at which we were able to become a trusted working group was phenomenal, stemming largely from the leadership of Morae’s Phoenix group and their long experience in the market,” says Tanner.

Chris Davis, Phoenix Managing Director for APAC says, “We are excited to be working with Bill and his team at Allens to help future-proof their firm by implementing the best IT infrastructure on the market”. Chris continues, “It is a mark of our breadth and depth at Phoenix to advise and implement multiple iManage services to such tight timescales. It also showcases how our expertise in digital transformation and iManage services is unrivalled both locally and globally, including 9 of the Top 10 law firms in Australia strategically partnering with Phoenix.”

**Most recent project**

Tanner and his team are currently working with Morae’s Phoenix group on the next upgrade of iManage and developing a way of testing the platform’s newest features using live data.

“Phoenix has been a great contributor to the design of the new model which will help us to benefit from iManage’s latest features. This next phase will involve implementation and working through change management and adoption. Having finished off the Security Policy Manager project, we are excited as we begin this latest project,” says Tanner.

**About Phoenix Business Solutions and Morae Global Corporation**

Phoenix Business Solutions, a Morae Global Corporation company, is a leading global, information and document management specialist, providing strategic consultancy, software solutions and digital transformation for organisations across the legal and professional services markets. As the Number 1 Global iManage Partner, with unparalleled iManage technical expertise and extensive industry knowledge, we support over 300,000 users from over 400 customers across the world. For more information on Phoenix visit: [phoenixbs.com](http://phoenixbs.com)

Morae Global Corporation provides comprehensive legal and compliance solutions to law departments, compliance teams and law firms. Morae’s team of experts is comprised of some of the most seasoned and knowledgeable professionals in the legal industry who are trusted to transform legal ecosystems worldwide. Core service lines include information governance and discovery, advisory and alternative legal resourcing, and digital transformation solutions. Morae has offices around the world, including in Abu Dhabi, Bangalore, Chicago, Frankfurt, Hong Kong, Houston, London, Maastricht, New York, Sydney, Washington, D.C., and Zurich. For more information about Morae Global Corporation visit: [moraeglobal.com](http://moraeglobal.com)



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