iManage
Making knowledge work

US-based global corporation switches from NetDocuments to iManage

Changing providers is a transition worth making for a document management solution people are happy to use

Industry:
- Corporate legal department

Headquarters:
- US

iManage footprint:
- iManage Work 10 in the Cloud

A US-based global corporation with annual revenue of $16 billion has a legal operations department of about 100 employees across the globe, including attorneys, compliance, and other legal professionals. The department needed a document management solution and, having no experience choosing this type of application, they engaged a leading consultant to help them evaluate the top two players in the market for legal users.

After seeing demos of iManage and NetDocuments, they went with the latter, noting it was 100 percent cloud-based and seemed to have more AI-driven features. After implementation, however, the team faced administrative challenges in setting things up and difficulty training users, along with a persistent lack of support from the vendor. Two and a half years after implementing NetDocuments, most users were either dissatisfied or had stopped using it. After doing the work to identify the problems they needed solved, they engaged with iManage. Once persuaded that the switch to iManage Work 10 in the Cloud would be a night and day difference for the team, the rest was easy. They look forward to a long and rewarding partnership.

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>
> **Head of Global Legal Operations,** US-based global corporation

Business outcomes

- All technological issues resolved
- Customer success on speed dial
- User adoption in the 90th percentile
- AI capabilities eagerly anticipated

The business challenge

Evaluating the options

"Tiny but mighty" is how the Head of Global Legal Operations describes the department. About half of the team are attorneys, and the rest are compliance and other legal professionals. The team's budget is approximately 70 percent outsourced, which makes them "a bit unique, as an internal in-house team," in their needs.

The team had no prior experience in using or evaluating document management solutions. So when it became clear that the department needed one, they engaged a consultant to help them. After looking at the top two players in the market for legal users the Head of Global Legal Operations said it was not an easy or obvious decision, but they felt NetDocuments might be slightly more cutting edge. It wasn't until after the implementation that things went a bit sideways.

A rough start for admin and users

The administration of the system felt unnecessarily cumbersome. System complexity also plagued users and negatively impacted training outcomes and adoption. The interface was not user-friendly. The software vendor seemed unmotivated to help them solve problems or keep them as a customer, despite persistent efforts to obtain support. Usability was so daunting that, after 2.5 years, they could only count about a year during which people were legitimately using the tool — and most of them were either dissatisfied or had stopped trying.

Laundry list of issues

There were difficulties around email syncing, where folders would randomly become unsynchronized.

ndMail also requires the ability to impersonate users in the Exchange domain to retrieve and file email for subscribed users. A litigation attorney with a large archive file was struggling to get it merged because no specific email address or account was associated with it. The attorney's reaction was, "I don't even want to use this."

A significant group of attorneys maintain deep folder structures, it's how they prefer to work. But in NetDocuments, the deeper your folders go the more challenging it is to search for things. So that's 20+ attorneys who are unable to effectively search.

The AI features were intriguing until they did the cost-benefit analysis. They decided it wasn't worth buying an expensive module with limited out-of-the-box features and then spending more money building out the desired capabilities.

The system also went down a lot, to the point where people could not retrieve their documents. When they reported it to the vendor they were told that the resolution was coming, but insisted that it wasn't technically a system outage. "We knew they were avoiding calling it a system outage for SLA purposes," said the Head of Global Legal Operations, "but when people can't get their documents, in the team's view, the system is down. So communication with NetDocuments was particularly unhelpful when the system wasn't functioning properly."

People found the interface difficult to navigate. They didn't understand why they couldn't just click something from a dropdown to create a workspace for a matter. It had to come from the matter management system or a special intervention was needed from an admin. This was unacceptable, so the department had to create an interface so people could create a matter nimbly, at their speed, rather than waiting for someone else to do it. They felt it shouldn't be a back-end process just to create a matter or workspace.

Weighing next steps

Over the course of the year that the team was "actually using the software" there were enough issues that they began to think maybe this hadn't been the best choice. The absence of any attempt at customer success and lackluster support overall from the NetDocuments side added to the problem. And that was evident to the team.

"NetDocuments just didn't meet the mark for what was important to us," admitted the Head of Global Legal Operations. "We began weighing the cost of changing course against what it would cost us in the long run to be without the solution and the capabilities that we needed."

The solution

Deciding to switch to iManage

One day the frustration came to a head, prompting the question, "Should we switch?" And the answer was a resounding "Yes." Adoption was slipping. NetDocuments wasn't working for people and many just stopped using it, which was not a good outcome. And, fortunately, it was within the team's means to make the switch.

"The prospect of moving to iManage was 'music to the ears' of the people who were unhappy with NetDocuments," said the Head of Global Legal Operations. Some were a little surprised to learn they would be asked to change again; people don't all love change. So, before the department cut their losses, they wanted to be certain they wouldn't have the same issues with iManage.

They surveyed the team and put together a list of pain points, which they went through with their iManage representative. Then they arranged a demo so the team could see how iManage was going to solve that whole list of problems. Their consultancy agency helped them produce a short video on how iManage looks, feels, and works, and they asked people to watch it.

Then they asked people if they wanted to move to the iManage platform — and did they have concerns? A few people wanted more information, and the Head of Global Legal Operations met with them individually to answer their questions. After that it wasn't a problem getting everybody on board.

iManage also invited two team members to attend ConnectLive, the annual conference iManage holds for its community members. At this event the Head of Global Legal Operations could talk with other customers and partners, hear from iManage subject matter experts and corporate leaders in a low-pressure setting, and see where iManage is headed as an organization. The Head of Global Legal Operations and a colleague attended the event, where they were able to do all of that. But they also experienced the energy, the relationships, and the unique sense of everyone pulling together to make the industry-leading iManage platform better.

Sealing the deal with customer success

The last piece clicked into place when the Head of Global Legal Operations connected with the iManage Customer Success team. After all the disappointing interactions with NetDocuments, building that relationship instilled confidence that iManage would work hard to meet the team's needs and keep their business post-sale and post-implementation.

Making the case to the General Counsel for budget approval, the Head of Global Legal Operations explained how the team had been new to using a document management platform when they chose NetDocuments. With the benefit of experience, they could now make a more informed comparison. No, the switch wasn't going to be free, but it was a relatively low price to pay for something everyone would be happy to use. And they had done their homework, so they had evidence for all of that, and it was go-time.

Business outcomes

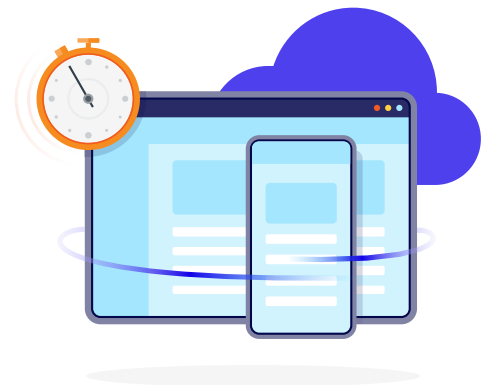**A smooth transition to iManage**

The next step was migration to iManage, making sure it was clean, bringing all the folder structures and taxonomies over intact on the new platform. Once the data was smoothly transferred, training followed. This time it was easy because, not only had people already used something more complex, but the iManage Work interface is inherently intuitive.

Consequently, adoption is very strong — estimated in the 90th percentile. Everyone they expected to use the platform for most of their work is doing so. "Adoption in the 90th percentile is a pretty big deal," the Head of Global Legal Operations reports. "In law firms, they say 'Welcome to the law firm. Use iManage. What's your next question?' but we don't see that as much in a corporate setting."

They add that having something people want to use and demand to use is a big win. "The solution needs to work for them and allow them to maintain their flow of activity. And we're there. We're all using iManage," they said.

Collaboration and communication

The Head of Global Legal Operations appreciates being in regular communication with iManage. They say having a recurring meeting on the schedule means they can ask questions and get answers directly from iManage, in real time. The conversations are productive and provide valuable information. They can ask if there is a solution for something they're seeing, for instance, or a better way they could be doing something, and find out what's ahead in the iManage pipeline. The Head of Global Legal Operations feels more informed and doesn't have to make any assumptions about what a tool can or can't do.

Looking ahead

Like everyone in legal, the team is evaluating AI capabilities. They are interested in finding things quicker, summarizing data, and pulling out the specific pieces they need. They have use cases for iManage Insight+ as well as other iManage AI applications or tools.

Let's say an attorney is looking for the force majeure clause in XYZ contract, they explain. One scenario is doing a search that takes them to the contract. They look it over, pull the contract off, highlight the excerpt, and so on. The attorneys want to speed up that process by using an AI-powered tool that empowers the attorney to bypass all the manual steps and head straight to the outcome.

Contract review is another case in point. How can the team summarize a contract for a quick review? How can they compare side-by-side? How can they redline in a way that's smarter, faster, and more efficient? These capabilities are evolving on the iManage side.

There is Ask iManage, and iManage Insight+ to help with knowledge management, but also iManage AI Enrichment to help teams better utilize Insight+ and make classification more automated. They are open to the opportunities ahead to start engaging with these tools within iManage and keep making knowledge work on the iManage platform.

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