

Fraser Milner Casgrain LLP Utilizes iManage WorkSite to Achieve National Integration

Profile: Fraser Milner Casgrain LLP

- Full-service Canadian law firm with offices in Vancouver, Calgary, Edmonton, Toronto, Ottawa and Montreal
- Approximately 1,400 employees, including 500+ attorneys

Solution:

- Uses iManage WorkDocs™, iManage DeskSite™, iManage MailSite™ and iManage WorkPortal™
- Deployment complete in five of the firm's six offices, with the sixth soon to follow



CHALLENGES

- Function as one firm rather than six separate entities, each lacking efficient access to documents, resources and expertise in the other five locations.
- Unify a national law firm by implementing a common document management and collaboration system.
- Migrate from three different legacy solutions in separate offices, and implement document management and collaboration from scratch in three other offices.
- Lay a foundation for further growth by increasing scalability while reducing maintenance and administrative costs.

RESULTS

- Entire firm now shares a single collaborative content management environment, eliminating three other document management systems previously in place.
- Collaborative workspaces help project teams, committees and practice groups work together more effectively.
- Portals built for clients strengthen existing relationships and help land new business.

Fraser Milner Casgrain LLP is a two year old firm with a 160-year history. One of Canada's leading full-service business law firms, Fraser Milner Casgrain came into being in 2000 through the merger of Byers Casgrain with Fraser Milner, which had formed through the 1998 merger of Fraser & Beatty with Milner Fenerty, in themselves the result of previous mergers. While extending the firm's capabilities and reach, these mergers also resulted in a patchwork infrastructure in which three offices used three different document management systems, while three others used none at all. In effect, the firm functioned as six separate entities, each lacking efficient access to documents, resources and expertise in the other five locations.

The time had come to bring all of the firm's offices and employees into a common collaborative content management environment—ideally without sacrificing the document management investments already made in Calgary, Montreal and Edmonton. “We were looking for a new generation of document management to migrate our existing systems into without jumping through a lot of hoops,” recalls National Technology Manager Scott Saundry. “We also wanted a document management and collaboration solution that will grow with us as we build our business and which can accommodate possible future mergers and acquisitions.”

iManage: A New Level of Integration and Services for an Established Legal Practice

Fraser Milner Casgrain decided to unify on iManage WorkSite, a comprehensive, integrated suite that delivers document management, collaboration, portal access, workflow, knowledge management and business process automation on a highly scalable and secure Internet platform. The firm had first started working with WorkSite in 1998, making the decision at that time based on iManage's people and vision. "Since then, iManage has kept a good pace in product innovation that has allowed us to keep moving and adopting new functionality," says Saundry. "We've never had to wait for iManage to develop something new."

WorkSite's integration tools promised a seamless transition from the firm's legacy systems as well as future extensibility, while its three-tier architecture provided the required performance, scalability and security. Most importantly, WorkSite offered Fraser Milner Casgrain the wide-ranging document management and collaboration functionality it needed to transform the way its attorneys and clients interacted, communicated and exchanged information both within each office and firm-wide.

Fraser Milner Casgrain's iManage implementation went smoothly, even taking place in parallel with the migration of all six offices onto common word processing, e-mail and accounting software. Users have found iManage WorkSite intuitive and easy to use.

Putting Information and Resources to Work Across Entire Firm

iManage has had a far-reaching impact on Fraser Milner Casgrain's daily business. Its attorneys can now create, access and store documents in secure WorkSite repositories from within the Windows applications they routinely use. A simple Web interface provides access to business content firm-wide. Linked to the firm's e-mail and financial systems, it will soon be available as an optional primary desktop interface.

By using WorkSite to develop client extranets, Fraser Milner Casgrain provides clients, internal work teams and third parties with a secure, Web-based view of current

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- SCOTT SAUNDRY, *National Technology Manager, Fraser Milner Casgrain LLP*

projects. Matter-centric collaboration around shared documents, transactions, calendar information and links to external resources helps distributed teams discuss projects with clients and each other to enable better, faster and more accurate customer service. Similar extranet sites enable internal collaboration firm-wide among committees, practice groups and administrators.

Satisfied Clients—and More on the Way

"WorkSite has definitely strengthened relationships with our existing clients," says Saundry. iManage also plays a role in forming new relationships by enabling the firm to offer prospective clients an elevated level of service. "It is something we pitch to highlight our capabilities and also demonstrate the value add for them. We're trying to raise the bar among law firms when it comes to delivering important benefits to clients through leading technologies."



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