

# Pitcher Partners Improves Productivity and Reduces Risk

iManage Work Enables the Firm to Leverage Electronic Filing to Enhance Productivity



## Industry:

- Accounting

## Challenges:

- The firm needed a better way to manage its information
- Professionals throughout the firm saved things differently across numerous shared network drives
- There was no way to be sure that client information was complete, or that records hadn't been changed or inadvertently deleted

## Solutions:

- iManage Work provided the best of both worlds – a solution for accounting-specific products as well as document management
- iManage had been doing this for a long time while everybody else was trying to catch up
- iManage has positive referrals about both their software and overall experience with the company

Pitcher Partners is a national association of independent firms. The association is represented by Pitcher Partners Melbourne, Pitcher Partners NSW, Pitcher Partners Perth, Pitcher Partners Adelaide, Pitcher Partners Brisbane and Pitcher Partners Newcastle.

## Challenge

Pitcher Partners needed a better way to manage its information. As the volume of electronic documents increased, professionals and divisions throughout the firm saved things differently across numerous shared network drives. There was no way to be sure that client or engagement information was complete, or that records hadn't been changed or inadvertently deleted. *"We had situations where we needed to be able to access documents quickly for a given client, and couldn't respond in a realistic timeframe,"* says Adam Irwin, Chief Operating Officer, Pitcher Partners NSW. As a result, the firm's professionals understandably preferred to work with paper documents, leaving the promise of electronic information management unfulfilled.

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*"Our vision was to have a central electronic repository for all of the firm's documentation—a single place where we could access client information, and know that it was complete, accurate, and up-to-date."*

— Adam Irwin, Chief Operating Officer, Pitcher Partners NSW

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## Solution

After reviewing accounting-specific products as well as document management (DM) systems, Pitcher Partners found the best of both worlds in iManage Work. *"What stood out about iManage was its proven technology,"* explains Irwin. *"They'd been doing this for a long time while everybody else was trying to catch up, and had positive referrals about both their software and people's overall experience with the company."*

**Benefits:**

- Centralizing and unifying client information
- Professionals are printing and retaining less paper, reducing physical storage costs
- Emails and attachments are now saved into shared engagement folders, easing the burden on its Exchange server

**Product:**

- iManage Work

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**About iManage**

iManage is the leading provider of work product management solutions for legal, accounting and financial services firms and the corporate departments they serve worldwide. Every day iManage helps professionals streamline the creation, sharing, governance and security of their work product. Nearly 3,000 organizations around the world — including more than 1,800 law firms — rely on iManage to help them deliver great client work. Headquartered in Chicago, iManage is a management-owned company.

Learn more at  
[iManage.com/products](http://iManage.com/products)



Pitcher Partners NSW worked with iManage partner Office Information Australia to implement a new iManage Work-powered information infrastructure based on unified electronic client files. *“Office Information Australia helped us hit all the key timeframes and roll things out according to plan,”* reports Irwin. Says Stephen Litton, director of Office Information Australia, *“Pitcher Partners made our work easier by thoroughly scoping the project beforehand. This kind of planning, combined with the implementation best practices we’ve built as more professional services firms make the move to iManage Work, goes a long way towards ensuring a smooth rollout.”*

**Benefit****Leveraging Electronic Filing to Enhance Productivity**

*“Our processes are now all around iManage Work. There’s little people do during the day that doesn’t involve it; it’s become central to what we’re all about,”* says Irwin. *“When I look at the system and the volume of documents being captured, the knowledge base articles being shared around the firm—there’s no way to quantify the productivity we’ve gained, but it’s significant.”*

Integration with the firm’s practice management software now automates the generation of workspaces for each engagement. In addition to centralizing and unifying client information, iManage Work’s Outlook integration and send-and-file functionality make it simple for Pitcher Partners NSW’ professionals to capture, file, and share emails alongside other documents. *“With other systems, email just fell off the radar, but more and more it’s our main communication tool,”* says Irwin.

**Reducing Risk and Aiding Compliance**

In the past, Pitcher Partners NSW lacked an efficient way to preserve and manage electronic records. With no capabilities for version control or locking down documents, there was no way to be sure that a given document was a true record of what had been sent to the client. *“It was also impractical for us to apply policies for retention and retirement; we would have to look at every individual record to decide whether to delete it,”* explains Irwin. *“iManage Work gives us more control over that process.”* As professionals gain confidence in the reliability of electronic documents and records, they are now printing and retaining less paper, further simplifying risk management while reducing physical storage costs.

**Improving IT Efficiency**

For IT, iManage Work’s centralized repository is much easier to manage than the shared network drives it replaced. *“We don’t have to worry about permissions or folder structures; everything is set up the way it should be, and it takes care of itself,”* says Irwin. Because emails and attachments are now saved into shared engagement folders, the firm is able for the first time to limit the size of peoples’ in-boxes, easing the burden on its Exchange server.

**Moving Ahead with Industry-Leading Capabilities**

*“From an image perspective, our iManage Work implementation reflects the care we take with our clients’ information and work. At the same time, because each user’s work becomes visible to the rest of the firm, it helps us maintain a high level of quality and professionalism,”* says Irwin.