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WHITE PAPER

A Path to Modernizing Document Management for Small and Mid-Sized Law Firms

By Chuck Davis and Jacob Borger



Small and mid-sized law firms are increasingly frustrated with unpredictable, high-cost IT projects. But what if there's a better way to modernize document management – without the usual upfront headaches?

What if we told you that firms can leverage the market-leading iManage document management system in a secure, compliant, and fully managed cloud environment, all delivered as a predictable monthly operating expense?

No big capital outlay. No hidden surprises. Just expert implementation, rapid go-live, and ongoing support—for less than the cost of a cup of coffee per day.

To appreciate what this solution is, it's important to first understand the problem.

The Problem: Legacy Systems and High Costs

To address the needs of small to mid-size firms, Morae has created a unique and innovative program, *Pathfinder*. The program offers a streamlined 'path' to adopting iManage, the leading legal DMS, without the typical upfront headaches. Pathfinder simplifies the implementation process, reducing lengthy delivery timelines and eliminating hefty upfront expenses. By offering iManage as a fully managed cloud service, Pathfinder ensures that any firm can benefit from a secure and compliant environment with ongoing strategic support.

The program is defined by four tenets:

Expert Implementation	Rapid Go-Live
Digital transformation experts guide firms through a well-organized process, ensuring a smooth transition to the iManage cloud.	The streamlined implementation process allows firms to start using iManage quickly, maximizing time to value.
Training and User adoption	Ongoing Support
The key to success for strong user adoption and meaningful outcomes is to ensure training, both during the implementation and on an ongoing biannual basis.	Continuous strategic support services help firms extract maximum value from their investment, unlocking the full potential of efficient document governance.

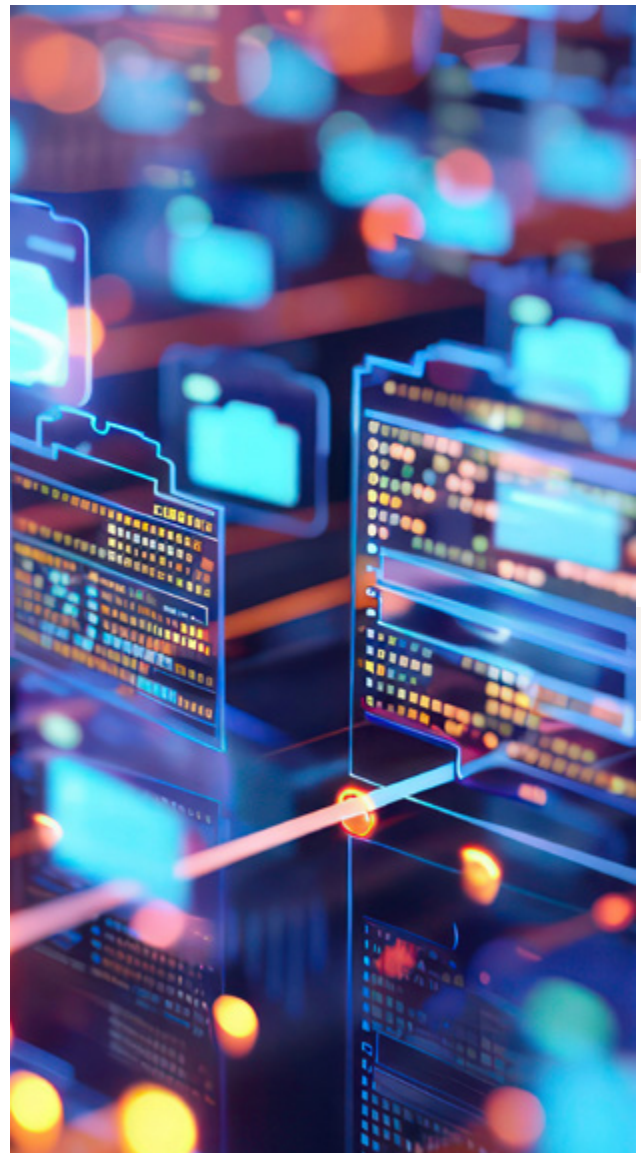
Why a Document Management System?

A document management system (DMS) is essential for law firms to efficiently manage, store, and retrieve documents. For firms that have not yet implemented a DMS, it enhances productivity by providing quick access to documents, reducing the time spent searching for files. A DMS also improves collaboration among team members, allowing multiple users to work on documents simultaneously and track changes. Additionally, it ensures compliance with legal and regulatory requirements by maintaining secure and organized records. For firms that already have a DMS but are looking to upgrade, a modern DMS offers advanced features such as version control, audit trails, and automated workflows. These features help firms maintain accuracy and consistency in their documentation processes, ultimately leading to better client service and operational efficiency. Upgrading to a more robust DMS can also provide enhanced security measures and better integration with other legal technologies, further streamlining workflows and improving overall firm performance.

Why iManage?

iManage stands out among legal DMS solutions for several reasons:

- **Market Leader:** iManage holds 61% of the market for legal document management systems, according to the ILTA 2024 Technology Survey Report.
- **Advanced Features:** iManage offers robust document management capabilities, including email management, full-text search, document versioning, integrated OCR, and AI-powered workflows and insights.
- **Security:** iManage provides strong security features, including data encryption in transit and at rest, multi-factor authentication, and geographic redundancy.
- **User Experience:** iManage’s user interface is designed to support efficient workflows, with features like one-click open/edit/save and document profiling.





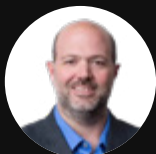
A Market Comparison

While other DMS solutions on the market do offer similar capabilities, iManage is particularly well-suited for law firms that require high levels of customization and integration with existing systems. By comparison, another solution on the market often touts a cloud-native architecture and integrated OCR, but this may in fact require more technical expertise for implementation. Another example provides a clean, modern interface and built-in OCR, but not the same level of customization as iManage. iManage continues to reinvest in additional modules, including in the areas of security, governance, and AI, all under a single platform.

Conclusion

For small and mid-sized law firms looking to modernize their document management without the upfront headaches, Morae's Pathfinder solution offers a unique and innovative path to adopting iManage. By providing expert implementation, rapid go-live, and ongoing support in a secure, compliant cloud environment, and a predictable cost, Pathfinder clears the way for firms to work smarter and more efficiently. With iManage's advanced features and strong security, firms can confidently transition to a modern DMS that meets their needs and supports their growth.

About the authors



Chuck Davis

Chuck is a Managing Director responsible for Morae's iManage and digital transformation business in North America.

At Morae, he spearheads a team of talented business development professionals who articulate and evangelize solutions for law firms, corporate legal departments and professional service organizations.

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Jacob Borger

Jacob Borger is Morae's Pathfinder implementation program manager and an Account Executive with 9 years of experience in the Legal Technology industry. This includes expertise in document management systems with focus on iManage implementations and migrations.

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