iManage Advantage over a Custom SharePoint Setup for Law Firms

A straightforward comparison of iManage Work and Microsoft SharePoint for legal document management, organized around the questions law firms most often raise when weighing the two.

1. Client-wise document management and organization

iManage Work is built around the matter, not the folder. Every workspace is created from a client or matter template and inherits security and metadata automatically. Documents, emails, and related files stay together in one place, tied to that matter.

SharePoint organizes content through sites and libraries. It can be configured with matter-oriented folder structures and metadata, but that structure must be designed and maintained deliberately. It is not native to the platform.

2. Legal-specific features beyond native SharePoint

Several capabilities come standard with iManage that typically require significant configuration or third-party add-ons in SharePoint:

- Matter-centric workspace templates that inherit security and metadata automatically
- Automatic email filing and threading, built for legal correspondence in Outlook
- Ethical walls and conflict screening through iManage Conflicts & Intake
- Legal transaction management for deal closings through iManage Closing Folders
- Dedicated records governance for physical and electronic files through iManage Records Manager

SharePoint information barriers and Microsoft Purview retention labels cover related ground at the platform level. They are general-purpose controls, not legal-specific ones.

3. Search, metadata, version control, and classification

Both platforms treat metadata as foundational. The difference is depth of legal context.

iManage Insight+ and Ask iManage let lawyers search and surface precedents, correspondence, and drafting materials using firm-specific knowledge. iManage AI Enrichment uses AI to classify and extract, auto-tagging documents by matter, client, and document type. Version control is native to every document check-in and check-out, with full audit history tied to the matter.

SharePoint search and Copilot-driven AI features are strong within the Microsoft 365 ecosystem. However, matter-centric classification and version lineage need to be architected; they are not automatic. SharePoint also does not retain audit data for more than 90 days by default.

4. Security, permissions, information governance, and access controls

The iManage need-to-know security model, ethical walls, and Zero Trust foundation are built specifically for firms managing client confidentiality and conflicts across matters. iManage Security Policy Manager lets firms adjust access without re-filing or re-indexing content.

SharePoint provides sensitivity labels, data loss prevention, audit logging, and information barriers through Microsoft Purview. These are strong controls, but they are designed for general enterprise governance rather than legal ethical-wall requirements. For firms handling contentious or transactional work, where conflict screening and defensible audit trails matter most, purpose-built controls carry less configuration risk.

5. Collaboration capabilities

Both platforms support co-authoring and Microsoft Teams integration. iManage Work 10 in the Cloud brings Teams integration, co-authoring, and Outlook email management into one matter-centric environment, so lawyers are not

switching between where documents live and where work happens.

SharePoint already sits inside Microsoft 365, so firms that are Teams-first and Outlook-first will find the collaboration layer familiar. The difference is whether that collaboration stays organized around matters as content grows.

6. Workflow, automation, and integration

The iManage platform covers several workflow areas:

- iManage Tracker supports task and workflow coordination.
- iManage Closing Folders automates transaction checklists, signatures, and deal-closing workflows, and integrates with e-signature tools such as DocuSign.
- iManage Threat Manager applies behavior modeling to flag unusual access to sensitive matters.
- iManage also integrates with practice and matter management systems commonly used in legal, including billing and conflicts platforms.

SharePoint automation runs through Power Automate. It is flexible, but legal-specific logic has to be built from scratch.

7. Law firms that have moved from SharePoint to iManage

The clearest public example is Clifford Chance.

- **Background:** The firm built and maintained its own SharePoint-based document management system for roughly a decade.
- **Evaluation:** It then ran an 18-month evaluation covering an upgraded SharePoint, a custom SharePoint build, iManage Cloud, and other competitors.
- **Decision:** Clifford Chance selected iManage Cloud in 2019, becoming the largest law firm at the time to move to a cloud-based platform, with 6,000 users globally.
- **Reasons:** The firm's chief information officer cited two main drivers. The first was needing to see email and documents together, since SharePoint required separate email filing that lawyers did not want. The second was the iManage Zero Trust security architecture.

More broadly, iManage is used by 80 percent of the Global 100 law firms and the majority of AmLaw 200 firms. This reflects a pattern of firms outgrowing self-built SharePoint efforts as complexity and security requirements scale.

Sources: Legal IT Insider (legaltechnology.com/2019/03/27/cc-selects-imanage-cloud-after-close-contest); IDM Magazine (idm.net.au/blog/0012424-global-law-firm-ditches-sharepoint-imanage); Legal IT Professionals (legalitprofessionals.com/global-news/11258-clifford-chance-retires-sharepoint-in-favour-of-imanage).

8. Migration process, implementation effort, and licensing

iManage Cloud migrations typically take several weeks to a few months, depending on data volume and complexity. They follow a phased approach:

1. Assess the current state.
2. Design the matter and security taxonomy.
3. Migrate and validate data.
4. Roll out with training.

Side-by-side comparison

A summary view across the areas most relevant to a law firm.

Area	iManage Work	SharePoint
Core organizing principle	Matter- and client-centric workspaces	Sites and libraries
Email management	Native email filing and Outlook integration	Requires separate configuration; no native matter-based filing
Ethical walls / conflicts	Built in (Conflicts & Intake, need-to-know security)	Approximated via information barriers and permissions; not legal-specific
Search and knowledge discovery	Insight+ and Ask iManage, tuned to firm knowledge and matters	Strong within Microsoft 365; needs legal metadata architecture to match
Records governance	Dedicated module for physical and electronic records	Microsoft Purview retention and records management (general purpose)
Transaction / deal workflows	Purpose-built (Closing Folders)	Not native; requires custom build or add-on
Security model	Zero Trust, need-to-know, matter-level	Sensitivity labels, DLP, audit logs, information barriers
Collaboration	Teams integration, co-authoring, matter-centric	Teams, Outlook, and Microsoft 365 co-authoring, native to the environment
Automation	Tracker, Threat Manager, Closing Folders, Power Automate connectors	Power Automate (build-your-own)
Licensing	Quote-based per user; cloud	Bundled in Microsoft 365 or standalone SharePoint Online plans
Implementation effort	Weeks to months: matter taxonomy, security design, data migration	Governance and architecture work needed to match legal discipline
Best fit	Firms where client confidentiality, conflicts, and legal workflow depth are core requirements	Firms standardized on Microsoft 365 that can invest in governance to match legal needs

iManage — confidential and proprietary.