

iTrain help Clarion maximise the adoption of iManage



iTrain were engaged by Clarion to provide iManage refresher training to support their recent implementation of iManage Work



Project Overview

Clarion successfully implemented iManage Work in August 2017, and as with the implementation of any new software it is important to give staff as much training as possible. Once people start using a new system there are always questions which arise. The volume of questions highlighted the need for additional guidance on best practice, specifically around the topics of version control and searching for documents.

Clarion wanted to ensure their staff were using iManage efficiently, with confidence and utilising all the value-adding features iManage provides.

About Clarion

Clarion is a Leeds-based Corporate and Commercial law firm, working within sectors from healthcare to IT, energy, manufacturing, food and drink, media and the built environment.

Clarion

“The training was a great help to our users and has supported the adoption of iManage across the firm. The training and guidance was part of our launch programme to provide on the job support once people had started using the system and incorporating its functionality into their day to day work.”

Dan Mitchell, Head of IT at Clarion

The Solution

We met with key stakeholders to understand what they wanted to achieve from both the training and from iManage generally. We also spent time with users from around the business, observing how they used iManage, discussing their experience and their personal goals.

The features that normally require additional training, such as email filing, saving attachments and linking Outlook folders, were being used well. Other topics, such as versioning and searching for documents, needed attention – but this is fairly typical. As a team of new users, we wanted to help them plug any knowledge gaps such as quickly finding Workspaces and using My Files/My Matters. On the whole, people understood how to create a document version, but not when and why.

Based on the consultancy, we developed a bespoke training workshop which focused on best practice and developing confidence and efficiency. Context was key - with the trainer explaining key concepts, discussing scenarios, document workflows and recommending best practice. Learners were encouraged to ask questions and participate in discussions. There was also a real focus on the value iManage can add, both to individuals and the firm. The response from learners was extremely positive.

About iTrain

iTrain are technology training experts.

We provide onsite and remote training, training material development, consultancy, project management and support services.

We specialise in supporting software rollouts and skills development programmes.

We can provide assistance to your internal training team, or we can be your training team.

The logo for iTrain features a lowercase 'i' in blue with a yellow dot, followed by the word 'Train' in a bold, grey, sans-serif font.
