

Simplifying the compliance process for H W Fisher

with Tiger Eye's Bespoke Development services for  iManage

Project Story

Top 25 UK chartered accountancy firm H W Fisher pride themselves on the personal touch with which they deliver their range of accountancy and financial advisory services. With clients ranging from high-profile entrepreneurial SMEs, to large corporates and high net-worth individuals, H W Fisher's team process, manage, store and work with large quantities of client data.

Therefore, as part of their ongoing digital transformation strategy, the firm aimed to streamline their iManage database management, searching for a solution to digitally replicate their paper-based records deletion process. The firm sought to make it easier for their team to work compliantly, whilst reducing admin overheads and time spent on low-value tasks.

H W Fisher found that existing solutions were unsuited to their budget and their needs, lacking the simplicity they envisioned for their solution. They began searching for an iManage Partner who could work with them to make their vision a reality. The firm selected Tiger Eye for the project given their extensive iManage expertise, trusted team and partnership approach, all of which gave H W Fisher confidence in the project's success.

Using Tiger Eye's continuous development process, the two organisations worked collaboratively to design an intuitive, powerful solution, developed around a data set exported from H W Fisher's previous PMS. Unlike other deletion solutions, the tool was designed to delete Clients and their Workspaces, Matters and any related content selectively, or in bulk. All this is then run from defined criteria set by the user (in accordance with retention policies) from an accessible and simple interface.

As well as producing activity logs for deletion history, the user-friendly tool offers restoration functionality, mitigating the risk of accidental deletion. Will Baylis, IT Manager at H W Fisher, added "manually restoring documents from iManage is very time-consuming and difficult. The deletion tool's restoration functionality makes the process much, much simpler, carrying out a very complex and difficult job easily and quickly, which is a real benefit for my team."

With testing completed, H W Fisher were able to delete over 11,000 clients from their iManage database in bulk within minutes.

With confidence in the services provided, the firm have made plans to work with Tiger Eye on a number of future projects.

Project Summary

Challenges

- A time-consuming manual records deletion process
- A lack of suitable, cost-effective solutions available to digitise the process

Solution

- A custom-developed solution, designed in partnership with users
- An intuitive, powerful tool with the ability to delete selectively and in bulk

Results

- A digital, streamlined data deletion process
- The ability to easily delete and restore data on-demand



"I really appreciated Tiger Eye's collaborative approach, as they were willing to work with us on our vision, using their advanced expertise to make the project a success."

Tony Blonk, IT Director, H W Fisher

*H W Fisher's GDPR Deletion tool is now available as part of our **TEC Tools for iManage** suite. Visit our website for details.*