



START-UP LAW FIRM DELIVERS BEST-IN-CLASS SERVICE WITH MINIMAL IT INFRASTRUCTURE – THANKS TO RBRO AND IMANAGE.



SUB ROSA

CLIENT PROFILE

- A boutique law firm headquartered in Miami, Florida
- Launched in early 2020 as a specialized estate planning practice
- Leverages technology to support a highly-mobile team and provide a more responsive client experience

Sub Rosa Law
subrosa.law

OVERVIEW

When the four founding partners of Sub Rosa Law launched their practice early in 2020, their vision was to create a 'hybrid firm.' Their goal was to leverage technology to deliver the capabilities of a large institutional practice combined with a boutique firm's responsiveness and personal touch.

With a limited budget and almost no support staff or IT infrastructure, the Sub Rosa team needed to implement a best-in-class document management solution that would provide enhanced functionality not typically available to most like-sized practices.

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Micheal Rosenblum,
Founding Partner
and Principal,
Sub Rosa Law



CHALLENGES

While many smaller legal firms use Dropbox as a document management solution, the Sub Rosa team knew it would not provide the functionality they needed.

Michael Rosenblum, founding partner and principal at Sub Rosa, explains: "Estate planning involves lengthy and complex documents that evolve over time," he says. "Having an indisputable record and the ability to track changes is extremely powerful. You just don't have that capability when you save files to Dropbox."

At the same time, Sub Rosa was committed to minimizing overhead. "We run a 'lean and mean' operation," says Rosenblum. "We prioritize client-facing resources, not IT infrastructure. We needed a great document management solution, but had a limited budget."

Finally, the document solution had to support a highly-mobile Sub Rosa team who needed to work and collaborate from anywhere. "Ideally, I'd like to be able to work almost entirely from the road," says Rosenblum. "We have to be highly productive, even during the pandemic, while remote from our clients and colleagues."

SOLUTION

Having used iManage previously, two of the Sub Rosa partners advocated strongly for the solution, but the firm needed to find an integrator who understood their unique requirements. After being introduced to the Sub Rosa partners, RBRO provided a demo to highlight the key features of iManage.

“The team was very impressed,” says Rosenblum. “One of my partners, who hadn’t used iManage before, texted me during the presentation, saying, ‘I’m 100% sold.’”

As Sub Rosa was a new firm, there was no need to migrate legacy files. Instead, RBRO provided a fixed template and folder structure that allowed the Sub Rosa team to populate files manually at their own pace.

RBRO implemented iManage’s cloud-based Work 10 application for Sub Rosa. The mobile-focused solution gave the Sub Rosa team a consistent user experience, whether using a phone, tablet, or laptop. RBRO also configured Work 10 to seamlessly integrate with Sub Rosa’s Office 365 environment.

Once the installation was complete, RBRO provided customized user training to ensure that the Sub Rosa team was productive with the new solution as quickly as possible.

“RBRO did a great job of helping us define our requirements,” says Rosenblum. “We’re lawyers, not technical experts, so we relied on their recommendations. They gave us a solution that we’re extremely happy with, and we haven’t had to make any significant changes to leverage it effectively.”

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Michael Rosenblum,
Founding Partner and Principal,
Sub Rosa Law



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Michael Rosenblum,
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BENEFITS

With iManage in place, the Sub Rosa team can respond to clients much faster. “I’m able to quickly search emails and other historical documents,” explains Rosenblum. “If a client poses a question, I can typically provide an answer the same day.”

The cloud-based Work 10 application provides the partners with the option to work anywhere, and from any device. “With iManage’s capabilities, I can deliver a high-quality customer experience from anywhere. That’s been particularly valuable during the Coronavirus situation,” says Rosenblum. “With iManage, we can provide a level of service that allows us to compete with any major traditional firm.”

That includes competing for talent in the future, he adds. “As we bring on new, younger attorneys, we want to give them tools like iManage that will allow them to be more nimble, flexible, and client-focused.”

The Sub Rosa team finds the drafting and versioning capabilities of iManage particularly valuable. Often, estate plans develop from many conversations with clients over months or even years. Those plans can change significantly based on evolving client requirements, and iManage allows Sub Rosa to securely store and quickly access previous versions of documents and emails. “With iManage, we can access and review all older versions and changes of long, highly-technical documents,” says Rosenblum.

As Sub Rosa grows, the partners will continue to look to RBRO and iManage for technical innovation. “We’re now talking to RBRO about how we may be able to integrate our CRM software down the road,” says Rosenblum.

Meanwhile, Rosenblum and the team are very pleased with how well iManage is helping them grow their practice. “If I were forced to make a choice,” says Rosenblum, “I would give up my office space before I gave up using iManage.”

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