iManage | CO-FLO Solutions

Co-Flo for iManage

Business Operations Management for Legal, Compliance, HR and Risk Departments

Co-Flo is a cloud-native operations management
suite for corporate service teams who manage sensitive,
IP-intensive and high-value information and data.

Key Benefits

Operational Intelligence

Gain real-time operational visibility into work status, team workloads, and bottlenecks.

Intelligent Intake

Know exactly which departments and work types are driving demand.

Improve Team Performance

Manage key dates and tasks and identify blocked or incomplete delivery to ensure consistency and quality.

Demonstrate Delivery

Set expectations based on work type and deliver consistently and on time.

Justify Investment and Innovation

Make data-driven decisions - innovate and test before deploying.

Corporate Service Teams today face several operating challenges. While Document Management is essential as a single source of truth and document control, it does not address the operating challenges of managing work in progress, delivering complex and varied projects on time and managing team and external resources effectively to do so. Demonstrating concrete value to the business is difficult without this data, making it more difficult to justify investment and innovation. It is hard to work effectively with groups such as Risk, Compliance and Legal if you're not using the same core systems but given the sensitive nature of information and the need to protect security in each group, this has not been fully possible.

Until now.

Co-Flo extends iManage with operational metadata that enables the automation and optimization of business processes, turning everyday work into actionable Operational Intelligence. It connects intake, work management, and AI-enabled contract lifecycle management in a single system, giving teams real-time visibility into workload, progress and risk.

Case Study

Operational Intelligence in Action: FirstRand Bank

With 400+ matters spread across 14 business units, FirstRand Bank needed clearer oversight of legal work. Co-Flo delivered real-time Operational Intelligence interactive, integrated dashboards - giving legal teams visibility, control, and the ability to act faster.

Key Results

- Clear visibility of work, across 14 business units, reducing silos and surfacing risk.

- Centralized tracking of 400+ legal matters, improving coordination and control.

- 17 legal managers able to assign work more efficiently, maximizing resources.

- Standardized tracking across 5 core legal work types, making reporting and analysis easier.

- Real-time view of status and progress, helping teams quickly spot and fix bottlenecks.

Co-Flo Essentials

Delivering Operational Intelligence

Co-Flo improves visibility, accountability and on-time delivery by answering questions you never could before, like:

1. How much and what type of work is incoming?
2. Who is doing the work?
3. What is the exact status of the work?
4. Where is the work work blocked or bottlenecked?
5. What risks are hiding in the works?

Answers to these and other questions are presented in live dashboards linked directly to the relevant iManage Workspaces, so you can move from seeing something to taking action on work in process with a single click - boosting productivity and speed of execution.

Use this Operational Intelligence to:

- Manage real-time allocation of work, internally and externally

- Track work stages and status, to ensure timely delivery and identify blocked work

- Proactively track and manage risk, to prioritize work

- Improve performance and on-time delivery

- Optimize processes with data-driven insights

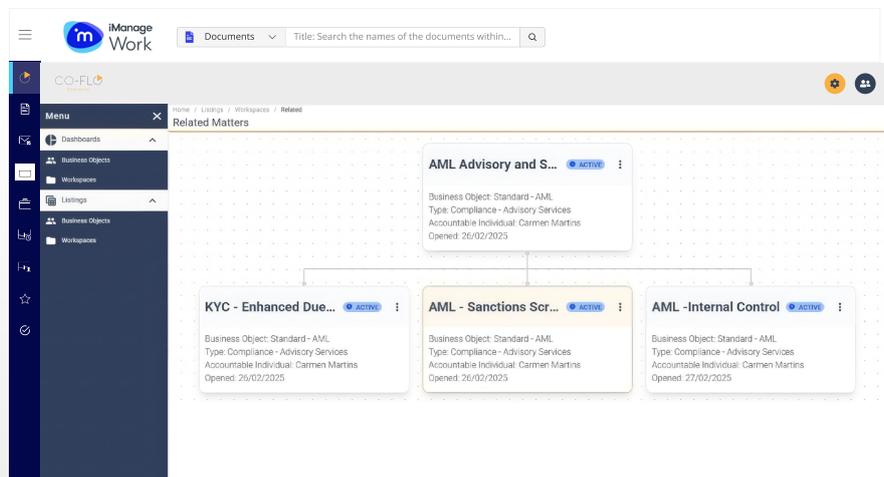- Demonstrate delivery and make the case for additional resources

Co-Flo integrates data from iManage, from users in Smart Forms and from existing systems of record such as ELM, CRM, ERP and others.

Co-Flo Essentials includes pre-configured templates for Legal, Risk and Compliance and HR to reduce implementation costs and time to value. Additional customization and configuration for other departments is fully supported by iManage partners.

"Before Co-Flo, managing legal work was fragmented and time consuming. Now, we have a complete view of legal activity across the business. We can see what's coming, whwere it's stuck, and who's doing what - and act imediately."

Head of Legal Operations, FirstRand Bank

Co-Flo models the true complexity of your organization and work, so insights are more meaningful and lead to greater business impact.

Co-Flo Professionals

Automate Key Processes to Boost Productivity

Co-Flo Professional extends Co-Flo with powerful automation capabilities like:

eSignature integration: Native integrations with DocuSign and Adobe Acrobat Sign provide visibility directly within iManage.

Task management and checklists: Co-Flo integrates with iManage Tracker or MS To Do, so you can design work-specific task lists to standardize how work gets done and ensure high-quality delivery. Work stages help identify stalled processes to ensure on-time delivery.

Document routing and approval: Send documents through serial or parallel workflows from within iManage, with status tracked in iManage Tracker or MS To Do.

Work intake – department front door: Smart Form based intake captures work types, submitting departments, and more. Enables classification and intelligent assignment of work and automatically generates the correct workspace in iManage.

All Fully Integrated with iManage Work for Easy Implementation, Increased User Adoption & Higher ROI

Co-Flo is seamlessly integrated into iManage, so users require little additional training and adoption is higher. Work types, security policies, key workflows, dashboards and more can be customized to each department's needs, creating an environment where Legal, Risk and Compliance, Finance, HR and more can effectively collaborate, while each retains their specific view of corporate work. Smarter decision-making, user productivity and Operational Intelligence all drive significant value-add and ROI.

Tasks and Reminders help ensure on-time delivery and completeness of work.

Take your operations to the next level with iManage | Co-Flo solutions.

About Co-Flo

Co-Flo is a strategic iManage partner, delivering its cloud-native operations management suite for corporate service teams. Built by technology and operations experts, Co-Flo extends iManage into a multi-departmental solution, optimizing service delivery and team productivity across Legal, Compliance, Risk and HR departments. Co-Flo ensures visibility and control over work-in-progress to improve timeliness, consistency and quality of knowledge work.

Visit www.co-flo.com to learn more.

About iManage

Dedicated to Making Knowledge Work™, iManage cloud-native platform enables organizations to work more productively, collaboratively and securely. Employing award-winning AI-enabled technology, an extensive partner ecosystem and a customer-centric approach, iManage provides support and guidance you can trust to help you leverage knowledge to drive better business outcomes.

Visit www.imanage.com to learn more.

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