

CLIENT STORY

ISADORE GOLDMAN

Using Power Apps to transform internal processes and document management.

ISADORE GOLDMAN

Industry: Legal Practice

Location: London, Norwich and Portsmouth

Isadore Goldman is a specialist boutique bankruptcy, insolvency and restructuring practice. It is one of the leading UK law firms in this sector. Their model is about a true hands-on, high-quality service led by their experienced senior lawyers.

With offices based in London, Norwich and Portsmouth they cater to a clientele across the UK and around the world.

Their insolvency and restructuring lawyers are considered experts in their field and are consistently recognised in both Chambers & Partners and the Legal 500. They have built up many years of experience in advising a wide range of clients in relation to all forms of insolvency and restructuring procedures and related disputes. Their lawyers are expected and encouraged to be creative problem solvers and to work in a manner that maintains a hard-won reputation as an exceptional, outcome-focused law firm.

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 Isadore Goldman





CHALLENGE

As a leading UK law firm, Isadore Goldman are dedicated to operating as efficiently as possible. With offices in three UK locations, internal systems and processes need to be clear, easy to manage and seamless for all teams.

Documentation System

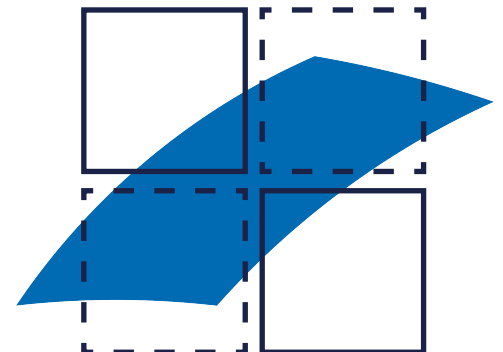
Important internal and client documents were stored in an overcomplicated, inefficient intranet system. With no search function or filtering options, the team would spend time clicking through long-winded file structures to find key documents.

Internal processes

When it came to internal processes, Isadore's expenses and holiday bookings were managed on Excel spreadsheets. This is both difficult to manage and time consuming due to the lack of automation available.

Additional management processes were also required, including a way to allow hybrid working staff to book desks check-in to their respective offices.

It was clear that the team at Isadore Goldman needed a more intuitive and responsive system that would work with their existing systems and data sources, whilst minimising the administration process and potential errors for manual data entry.



SOLUTION

Our Power Platform Engineer began working on a solution. We first looked at SharePoint as a replacement intranet for the documentation system. However, we found it wasn't suitable for the file structure.

It was decided that Power Apps would be used to build custom applications for both the documentation system and the internal processes required. These could then be used alongside Power Automate, to create workflows and automate tasks, such as sending approval emails and booking calendars.

Documentation System


The documentation system was designed as a document tree. The app was created with the following features:

- A tree design that clearly shows the document structure and allows users to navigate through folders and files easily.

- A search function that allows users to easily locate documents by keywords – when a file is located, it opens the document and builds the tree path to the file.
- Customisation options that can be managed by the Isadore team without additional support.

Internal Processes

Next, we used Power Apps to build automated and integrated apps for Isadore's internal processes. This included:

- A check-in board that allows users to check themselves in and out of different office locations, add external meetings or travel plans, and can be filtered by departments.
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SOLUTION

- An automated greeting message each morning asking where each user is working each day.
- A desk booking app that allows users to book desks and meeting rooms in each office. This is matched to the user's office location in Azure to show them the relevant office floorplan when opening the app. Additionally, when booking meeting rooms, the app also adds the room booking to the users Outlook calendar.
- An expense app that allows users to submit different types of expense claims. The claims include custom fields, relevant codes based on the user, documents uploads and the ability to submit one expense split across multiple users/teams. Management then sees the approvals side of the app to approve or deny requests.
- A holiday booking app that automatically sets the allowance for each employee at the start of the year and allows users to request leave days. Management can then approve or deny requests, as well as add employee sickness and company-wide holidays of their colleagues. The app also features a new starter/leaver process which will automatically calculate an employee's holiday when they start or leave throughout the holiday year.

The apps are designed to be consistent with Isadore's branding and theme, and are responsive and adaptive to different screen sizes and devices. To make the apps accessible to all employees, they sit within the Microsoft Teams application which is used company-wide at Isadore Goldman.

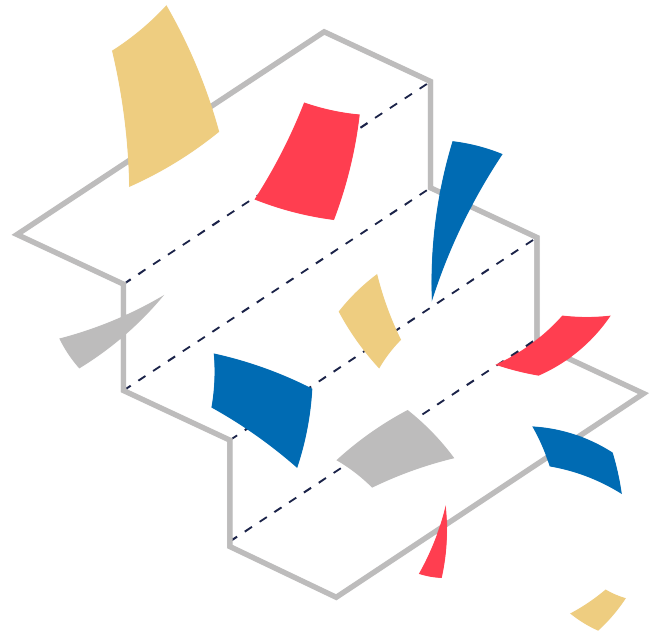
RESULTS

The applications we have built are a significant improvement on the previous intranet and Excel spreadsheets. These, plus the additional apps build allow for better communication and management across the offices.

New functionality and automation within the apps have enabled employees to:

- Access and manage their documents faster and easier.
- Book and manage their office resources and expenses more efficiently.
- Plan and manage their work schedules and leave days more conveniently.
- Streamline processes bringing more consistency.

The apps have allowed Isadore Goldman's team to focus more on their core roles and less on administrative tasks.







The diligent work, undertaken by Breakwater IT, on the introduction of the Power Apps has been a great success on multiple fronts.

They have drastically improved the processing of expenses and credit card submissions, leading to significant time savings in back-office processing time. Holidays are being authorised with more accuracy and speed, staff locations are being more easily ascertained, and office space / desks are being more efficiently used.”

- **Martin Fox-Cooper, Isadore Goldman**

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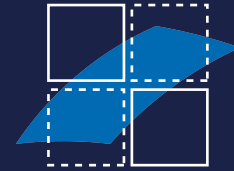
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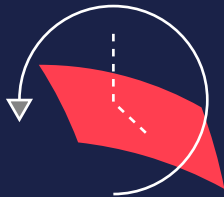
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