

Case Study - IDAHO® Workflow

Content workflow to ensure quality control for knowledge professionals



Background

Berners Marketing has been providing content-based marketing services to the legal profession since 2004 - long before content marketing was a big thing! Without any products to showcase, content is a critical element of the marketing mix for law firms as they seek to promote the expertise and credentials of their professionals.

"Quality control has always been a key issue for Berners Marketing and remains our unique selling point" explains founder and Managing Director, Sue Bramall.

Unusually for a marketing company, Berners Marketing employs two qualified solicitors who manage a team of freelance solicitors, barristers and legal journalists in order to meet the content requirements of law firms throughout the UK and overseas, from China to Costa Rica.

Growth in Content Services

The success of Berners Marketing meant that the volume of content that was being planned, commissioned, edited, approved and delivered had grown substantially. As well as growth in the number of firms that the company was servicing, there was growth in the number of types of content and the number of distribution outlets.

"The last decade has seen huge advances in the use of multimedia and social media. Historically lawyers wrote articles, delivered presentations and occasionally authored a chapter or a whole book. Now, a presentation might be produced as a live webinar which may be made available for download later with a transcript, repackaged as a white paper, promoted via email and social media."



A Surplus of Spreadsheets

Berners Marketing had been managing their workflow with a growing family of spreadsheets to plan content ahead of new legislation, track who the content was with, monitor deadlines, plan related content in a variety of formats, and ensure distribution was maximised. All the spreadsheets were closely related, but not connected and so always slightly out-of-synch. There was a great deal of duplication of effort as the team took a belt-and-braces approach to quality control and deadline management.

"A lawyer's personal reputation is as important as that of the firm, and they put a lot of trust in us when allowing us to publish material in their names. As in any regulated environment, the approvals process is critical and needs careful tracking before publication."

"We were getting increasingly concerned that our numerous spreadsheets were not fit for purpose, and we saw this as both a risk to the business and a brake on future growth."

The Need for a Content Workflow Solution

Having tried a couple of off-the-shelf workflow systems, the team could not find anything that fulfilled their needs. Sue set out to define their processes and search for someone to help make it a reality.

"Over the years, I have helped law firms to develop numerous new websites, some of which had pretty complex calculator apps. So I knew that it was important to produce as detailed a specification as possible in order to get the best result from a coder. But, in this case, I did not know what sort of coder I needed and wasted quite a lot of time with techies who just did not get what we wanted to achieve - a central database with one set of live data that could be accessed by all users via a web interface."

Requirements

- ✓ *a single live database which shows the location and status all content for all our clients;*
- ✓ *a dashboard which shows each team member their commitments and activities with key deadlines;*
- ✓ *the ability to plan ahead and prioritise workloads;*
- ✓ *the ability to tailor distribution strategies to individual lawyers within a firm;*
- ✓ *an audit trail for content approval and distribution; and*
- ✓ *user-friendly reporting.*

Serendipity and Toastmasters

In 2015, Sue Bramall joined Shropshire Speakers, a branch of the international public speaking network Toastmasters and met Matt Hegarty, who was club chairman at the time. It was at a club meeting when Sue and Matt first discussed collaborating on a workflow system for Berners Marketing.

Sue explains how the first discussions of IDAHO came about: *"Having heard Matt speak on a range of issues, from AI to blockchain, I was impressed that he was able to discuss technical matters in plain English and I mentioned our workflow problem to him. He had experience of working on some really big systems (much bigger than our workflow solution would ever be) and his work for the Ministry of Justice meant that he understood why the quality control aspects were so important for the legal profession."*

In September 2016, Bellaport Systems Ltd was instructed to produce version 1 of IDAHO Workflow for Berners Marketing to use

About Matt Hegarty and Bellaport

Matt Hegarty has worked in web-based software development for over 20 years.

Matt has extensive experience in the full software development lifecycle, including requirements gathering, architecture design, development, testing, systems administration and support.

Matt holds an honours degree in Psychology from the University of Surrey, and a Master's degree in Artificial Intelligence from the University of Sussex.

Following graduation, he worked as a developer in one of the UK's first web design agencies, based in central London. In the years before many modern web frameworks existed, Matt worked on bespoke web applications for national retail clients, government projects and banking systems.

Clients have included the National Health Service, University College London, the Houses of Parliament, the Ministry of Justice, and Accenture. In recent years, he has worked on one of the world's biggest websites, leading development teams at bet365 to design and build cutting edge high throughput, high availability systems.

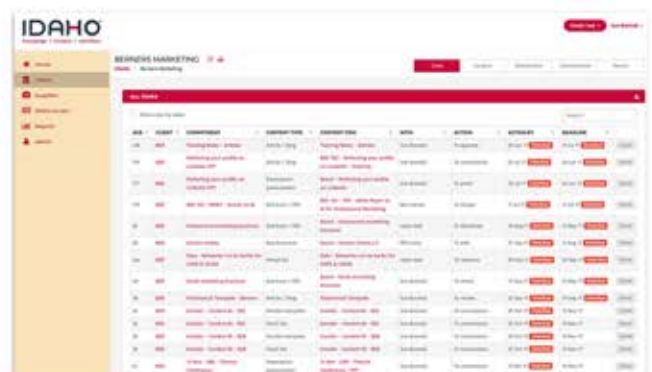
In June 2016, Matt set up Bellaport Systems Ltd to bring his skills and experience to help transform businesses using IT solutions. Matt's background meant that he could discuss systems requirements with clients in plain English, and have a clear understanding of how the requirements could translate to a solid technical implementation.

Matt Hegarty outlines the development of IDAHO:

"The first step in the development of IDAHO was to meet on-site with Sue and her team and develop a series of user stories to define the core requirements of the system. A common terminology to describe business entities was introduced. Over a series of meetings, we developed the basic requirements and sketched out paper versions of the main user interface."

"One early challenge was that while the Berners Marketing team had a very detailed understanding of their business processes, it was tricky to define these practices into an application specification. We worked together to produce clickable wireframes, and then a detailed technical specification. We iterated and improved the specification at a series of meetings through the second half of 2016 and early 2017. The early implementation of IDAHO took place alongside the formal definition of the specification."

"The alpha version of IDAHO was released on 1st March 2017. We refined the system and adjusted functionality through out the Spring of 2017. In early Summer 2017, we released the beta version, and the Berners Marketing team started to use the system with live data. We continued to refine and improve the beta version, and the first release candidate was issued at the end of October 2017. IDAHO went live in early November 2017."



Single Page Application

IDAHO has been implemented as a "single page application". This is a modern web design concept which means that the graphical front-end of the application is clearly separated from the back-end server and database.

A single page application provides a slick user experience, as blocking calls to the database are minimised. The architecture also means that it is easy to extend for mobile applications, or to open up the platform to third parties, as is envisioned in the future. IDAHO has been implemented using Google's Angular technology, and the robust Django web framework.

Matt says: *"The fact that we have the skills and experience to develop and host IDAHO ourselves, means we can maximise stability, performance and security, which are critically important in modern web applications."*



Matt Hegarty
Director
Bellaport Systems Ltd

If you would like to talk further about any of our services, please get in touch.

+44 (0)7754 410524
matt@bellaport.co.uk
www.bellaport.co.uk
@matthewhegarty

What the developer says ...

"It has been a pleasure to work with Sue and her team at Berners Marketing. As a start-up, Sue put a lot of trust in us to produce a reliable and workable system. One of the reasons I love working in software is because, although challenging at times, it's a great feeling when a system which has been designed from scratch goes live and immediately provides benefits for the client. I am delighted with what we have managed to achieve with the development of IDAHO. I feel that the platform will transform the day-to-day operations at Berners Marketing, making the team more efficient and improving their project management capabilities. The IDAHO system offers a lot of potential for future development, and usage by a wider audience."

What the client says ...



"It has been really great working with Matt Hegarty. He took a lot of time to really understand how we work and the objectives for the system. I'll

confess that this part was a lot harder than anticipated, but I can see how important it was to think things through as far as possible in order to get the specification as accurate as possible. He was incredibly patient with our lack of technical know how and I have learnt a great deal about best practice in developing the system."

Sue Bramall concludes: "Most importantly, we are really delighted with IDAHO – it is easy to use and has delivered on the key things that we required. I wouldn't hesitate to recommend Matt to others, and I have already done so!"