

GERALD
EDELMAN

OOSHA 

Gerald Edelman Case Study

How Gerald Edelman and Oosha are enabling the digital workspace

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The software within the Digital Workspace:

- Microsoft 365 for Teams video, e-mail, security and more.
- Voice-enabled Teams, all internal and client communication through a single application
- CCH – Multiple versions
- Sage – Multiple versions
- Olympus Dictation
- P11D – Multiple versions

The background

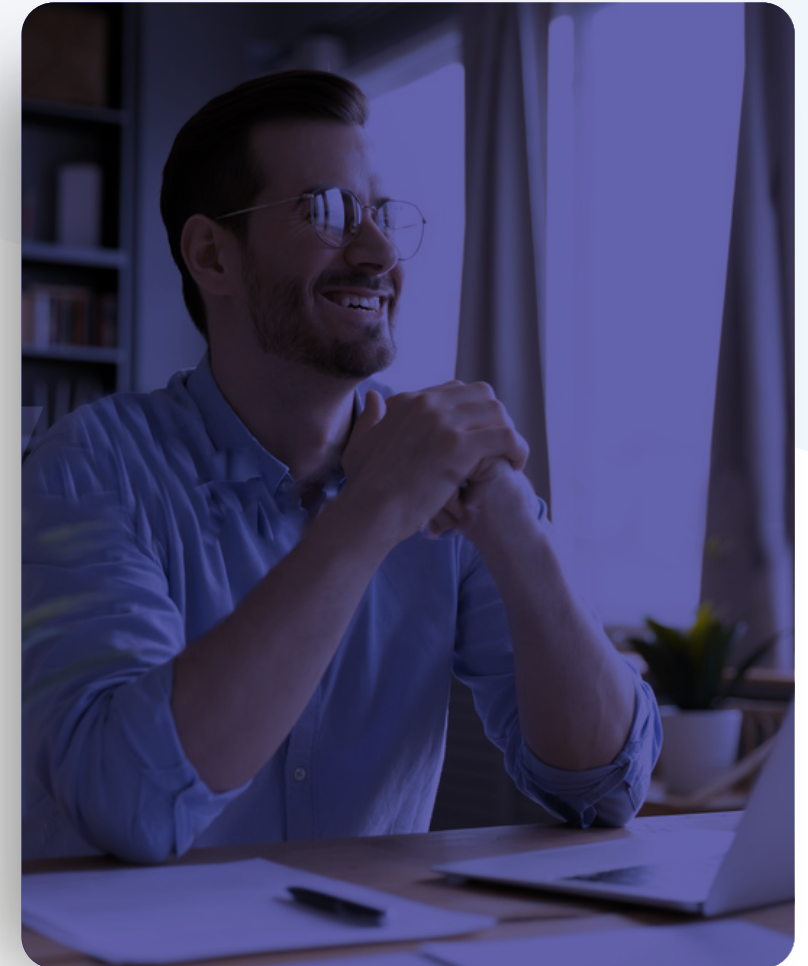
Founded in 1946, Gerald Edelman is a top-60 London-based business advisory and consulting firm, employing approximately 150 people, including 18 partners.

As well as providing accountancy services, such as tax and audit, in recent years they have evolved to deliver services which go beyond the traditional compliance-based services and which include advisory and consultative offerings, especially around international tax, VAT and transaction services, including M&A advisory.

The challenge

As an organisation, Gerald Edelman were looking for a highly responsive and forward-thinking IT partner, to help them keep pace with technology in a rapidly changing sector. They felt their legacy IT system wasn't able to meet the demands of modern business, and was holding them back.

With a focus on implementing a new IT solution that could provide superb performance when accessing their business applications and allow for seamless use of Teams as a collaboration tool, Gerald Edelman engaged leading independent IT consultancy Jeremy Hyman Associates to conduct a competitive tender process to source a new IT service provider. They selected Oosha to deliver their Digital Workspace Solution, largely down to the comprehensiveness of their solution and their experience in the accountancy sector.



The solution

Gerald Edelman began their journey with Oosha in early 2020 by first preparing to migrate IT support services over to Oosha's service desk, before then planning to turn to the implementation of the new Digital Workspace solution as a second phase.

However, the onboarding process fell squarely into the unprecedented changes brought on by COVID-19. So there was a rapid requirement to ensure all employees could work from home, which changed the scope of the original project plan.



"It was a moving target when we went live with support at the end of April, so the transition to Oosha's IT support service was done remotely at the same time as moving everyone to remote working...but it all went smoothly and Oosha managed it brilliantly"

Carl Lundberg,
Partner at Gerald Edelman



The second phase was the rollout of the new Digital Workspace solution, which allows every user within Gerald Edelman to seamlessly move between devices, from PCs and laptops to smartphones and tablets. It provides full, secure access to the Microsoft Office suite, all key business applications such as CCH, Iris and Sage, as well as the collaboration tools and data needed to run the firm day-to-day.

In terms of the underlying technology, this included the roll-out of a Cloud VDI (Virtual Desktop Infrastructure) solution for all employees, Office 365 and Microsoft Teams for all collaboration and telephony - bringing the firm's entire phone system into a single cloud-based Digital Workspace.

Every element of the solution is fully supported by Oosha's service desk, including the management of end-user issues with any third-party applications.

Carl singles out the Cloud VDI system for particular praise, emphasising that it has made a major difference to the workforce, and especially for senior staff, who often have to deal with large workloads, while on the move.



“We moved away from our previous Cloud platform which was based on older shared server Cloud technology. With the old shared server Cloud solution you could really tell when you left your local machine and it didn’t allow for us to use Teams or Zoom Video calls.

But with the VDI interface – the way it feels, the way things move about in there, the way you interact with it – all feels as though you’re working on your local machine, and not through the Cloud.”



Carl Lundberg,
Partner at Gerald Edelman

The benefits

Working with Oosha has helped Gerald Edelman enjoy improved outcomes in a number of areas, including:

Improved end-user experience

Employees can now easily access all the applications and tools in a secure, reliable virtual environment, to communicate with colleagues and clients, whenever and from wherever they're working.

Modern Collaborative working

With more integrated tools in place, Gerald Edelman has been able to train its whole workforce in using the same systems and how they can collaborate with them, especially with Teams for video and all telephony, plus SharePoint for files.

Specialist support

Oosha has taken control of all IT support matters including with accountancy software, meaning every issue is ticketed and transparently covered, with Oosha also contributing to aspects of system integration and data aggregation.

Smoother pandemic response

Oosha's VDI solution was fully deployed in the summer of 2020, solving the issues Gerald Edelman had suffered with through the first COVID-19 lockdown, where many staff didn't have the laptops or other devices necessary for secure remote work.

The future

Gerald Edelman is now looking to roll-out Globalflow – a solution engineered by Jeremy Hyman Associates to bring together data from across the various applications used by different service lines in the firm. This will give Gerald Edelman the ability to turn its disparate data into insights to help make more informed decisions.

Oosha are closely involved in enabling the infrastructure for Globalflow to operate quickly and reliably, and this in turn will help Gerald Edelman to plan work, find data instantly, and generally service clients seamlessly and rapidly, through streamlined operations and workflow.



“These are challenges a lot of accountants have: integration, different applications and having that single line of sight of all the data. Having that in a top-level, dashboard view means that then you can really go for best-of-breed in the underlying software, without worrying about whether they’ll all talk to each other.”

Carl Lundberg,
Partner at Gerald Edelman

