

Floyd Advisory

Modernizing Conflict Search for a National Forensic & Financial Advisory Firm

INDUSTRY	Professional Services · Forensic Accounting & Financial Advisory
ENGAGEMENT	Managed IT · Custom Application Development · Microsoft 365 Security
STACK	Next.js 15 · FastAPI · PostgreSQL · Docker · Microsoft 365 · Entra SSO
PROJECT	Conflict Search Web App — replacing a legacy desktop tool

<p>~18,000</p> <p>records in master conflict DB</p>	<p>Multi-daily</p> <p>searches across the firm</p>	<p>Desktop Web →</p> <p>modernization complete</p>	<p>Entra SSO</p> <p>ready for rollout</p>
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The Challenge

Floyd Advisory’s partners, associates, and operations staff run conflict-of-interest checks multiple times a day against a master database of ~18,000 records. The legacy tool was a Python/Tkinter desktop application with Excel output — slow to deploy, hard to update, and a poor fit for a modern, distributed professional services firm. Floyd needed a partner who could deliver both day-to-day managed IT and the engineering muscle to modernize their most-used internal tool.

Our Approach

- Designed and built a modern web application — Next.js 15 + shadcn/ui on the front, FastAPI with rapidfuzz matching on the back, PostgreSQL for the master record store.
- Containerized the full stack with Docker Compose for repeatable, environment-agnostic deployment behind the firm’s network.
- Built an admin panel so Floyd’s ops team can re-upload the master Excel file directly — no developer in the loop for routine updates.
- Wired Entra ID SSO into the auth layer, ready to activate against Floyd’s tenant for one-click sign-on.
- Wrapped the engineering work inside a managed IT relationship covering Microsoft 365 security, endpoint management, and day-to-day support.

Outcomes

- Conflict search moved from a single-user desktop tool to a firm-wide web app accessible from any browser, on any device, on the firm network.
- Search results that used to take minutes return in seconds, with much stronger fuzzy matching than the legacy implementation.
- Updates to the conflict database are now self-service for Floyd’s ops team, instead of requiring a code release.
- Floyd has a single partner for both their managed IT and the bespoke tools their practice depends on — fewer vendors, faster decisions.

“BMIT didn’t just keep our IT running — they rebuilt one of our most important internal tools and made it dramatically better at the same time.”

— Floyd Advisory Leadership

Read more: <https://bostonmit.com>