

Case Study: IRS SharePoint Workflow Modernization

Client: Internal Revenue Service (IRS), U.S. Department of the Treasury

Role: Subcontractor – SharePoint & Power Platform Redevelopment

Technology Stack: SharePoint Online, Power Automate, Power Apps, Nintex, InfoPath, Agile/Scrum

Challenge:

The IRS needed to retire outdated SharePoint 2013 Designer and Nintex workflows and modernize them in the Microsoft Power Platform environment. The scope included over 1,000 legacy forms and workflows spread across ten Business Operation Directorates (BODs).

Solution:

Zee Solutions, as a key subcontractor, led the design and redevelopment of legacy artifacts into Power Apps and Power Automate solutions. Highlights include:

- Led discovery sessions and Service Enablement Planning Workshops (SEPW) with IRS business units
- Created project roadmaps, schedules, and migration plans for over 1,000 items
- Delivered functional parity through custom Power Platform tools
- Provided end-user training, workflow documentation, and QA/UAT support
- Embedded Scrum Master to drive agile ceremonies and continuous improvement
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Outcomes:

- Seamless modernization of over 1,000 legacy workflows and forms
- Enhanced IRS team autonomy with training, documentation, and production-ready tools
- Increased operational efficiency through workflow automation and improved UX
- Strong alignment with stakeholder needs across ten IRS directorates
- Improved scalability and maintainability of IRS business systems