

CASE STUDY

SharePoint Modernization for Top 25 Global Accounting Firm

A Case Study in Modern Workplace Transformation

✓ Delivering modern collaboration solutions for enterprise clients

Accounting, Tax & Advisory

Presented by: eSoftware Associates Inc



About the Top 25 Global Accounting Firm



Nationally recognized advisory, tax, and accounting firm
Helping companies be more profitable, efficient, and future-ready



45+ Years Experience

Decades of expertise delivering financial solutions and strategic guidance to clients



Diverse Portfolio

Serving clients across healthcare, real estate, government, and technology industries



Innovation Focus

Committed to investing in tools and platforms that foster collaboration and knowledge sharing

The Challenge

Clients's internal SharePoint environment had become increasingly difficult to manage and navigate due to several core issues:



Legacy Customization

Heavily customized SharePoint portal creating significant limitations for layout changes, design improvements, and feature enhancements



Outdated User Experience

Interface lacked modern styling and structure, resulting in decreased usage and engagement



Poor Content Organization

Unstructured growth of libraries, documents, and pages with no unified strategy for document management



Limited Internal Expertise

No dedicated internal SharePoint resource to redesign or reorganize the platform



Client needed a solution that could work within the technical constraints of their existing system while providing a modern user experience.

Our Solution

eSoftware Associates partnered with Client to revitalize their SharePoint portal with a modern, user-friendly experience—without compromising their custom integrations. Our approach was structured, user-focused, and fully aligned with Microsoft best practices.



UI/UX Redesign

Modern interface designed within existing technical constraints, balancing aesthetics with functionality



Content Restructuring

Comprehensive content audit and implementation of new information architecture with consistent metadata



Enhanced Navigation

Cleaner site structure with improved categorization for quick access to departmental resources and tools



Employee Engagement

New page templates with dynamic announcements, team recognition areas, and embedded media content



Staff Enablement

Tailored training sessions for site owners and power users to maintain and evolve their digital workspaces



End-to-end solution aligned with Microsoft best practices



Our goal was to reduce IT dependency and allow departments to take full ownership of their digital workspaces.

Solution Details



Content Audit & Reorganization

- ✓ Standardized document libraries with consistent metadata and tagging
- ✓ Improved folder structures for intuitive browsing
- ✓ Optimized search configurations for faster, more accurate results



Navigation Improvements

Cleaner site structure enabling quick access to:

- Departmental resources
- Internal tools
- HR policies
- News & events
- Training materials



Page Templates & Features

- ✓ Dynamic announcements and news feeds
- ✓ Team recognition areas to celebrate achievements
- ✓ Quick links to essential tools like time tracking and IT support



User Training & Empowerment

- **Page Management Training**
Site owners trained on maintaining and updating pages
- **Web Part Utilization**
Effective use of modern web parts for dynamic content
- **Permissions Management**
Confident access control and security settings

“The goal was to reduce IT dependency and empower departments to take full ownership of their digital workspaces, creating a self-sustaining intranet ecosystem.”

Results & Business Benefits



Modern Look and Feel

Fresh, intuitive SharePoint portal reflecting the company's forward-thinking culture and brand identity

100% of departments covered



Improved Engagement

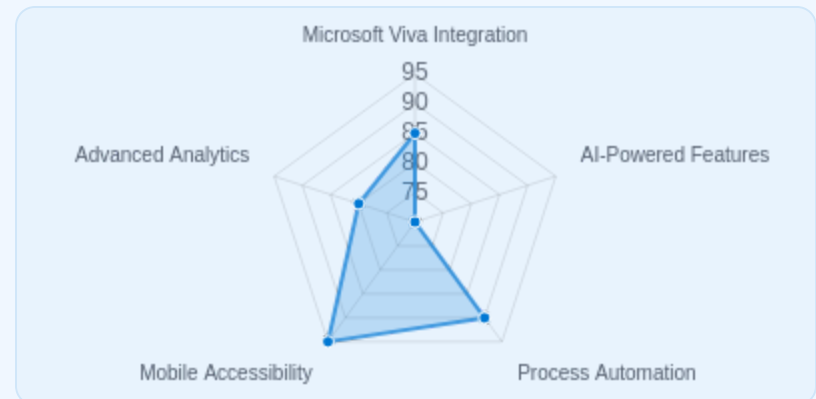
Measurable uptick in portal visits, time spent on key pages, and user interactions

↑ 47% increase in daily users



Future-Ready Foundation

The redesigned environment provides a scalable and adaptable platform, laying the groundwork for:



“The modernized SharePoint environment has transformed how our teams collaborate and share information. What used to take minutes now takes seconds, and our staff can focus on serving clients instead of searching for documents.”

- Client IT Director



Streamlined Access

Staff now find critical documents faster, reducing delays and minimizing frustration

68% reduction in search time



Empowered Teams

Internal site owners now equipped to manage and evolve their spaces independently

52% fewer IT support tickets

NEXT STEPS

Transform Your Digital Workplace

Is your SharePoint environment delivering maximum value?

Unlock the full potential of SharePoint with a modernization strategy tailored to your organization's unique needs and technical constraints.

Our SharePoint Expertise:

 UX/UI Redesign

 Information Architecture

 Custom Development

 Adoption Planning

 Process Automation

 Cloud Migration

 [Schedule a Consultation](#)



Email Us

consulting@eswassoc.com



Call Us

(800) 682-0882



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"Every organization deserves a digital workplace that empowers their people to do their best work."

