

CarlsonSV Corporate Intranet

Overview

CarlsonSV CPA's & Advisors is a growing Midwest-based accounting and advisory firm. To improve employee alignment with corporate vision and provide a single source for official communications and documentation, CarlsonSV partnered with Savvy Technical Solutions to design and implement a corporate intranet using SharePoint Online.

At a Glance

- Replaced ad hoc communications with a structured communication plan.
- Created a central repository for news, announcements, and official documentation.
- Improved company alignment on core goals and values.
- Improved company morale through improved communication.

Background

CarlsonSV operates across multiple regional offices and has expanded through both organic growth and acquisitions. As the firm scaled, it became more challenging to keep employees aligned with company goals because teams were spread across locations and organized into diverse service lines. Managers also struggled to communicate consistently across business groups and offices, and employees often had trouble finding the most relevant information quickly.

About CarlsonSV CPA's & Advisors



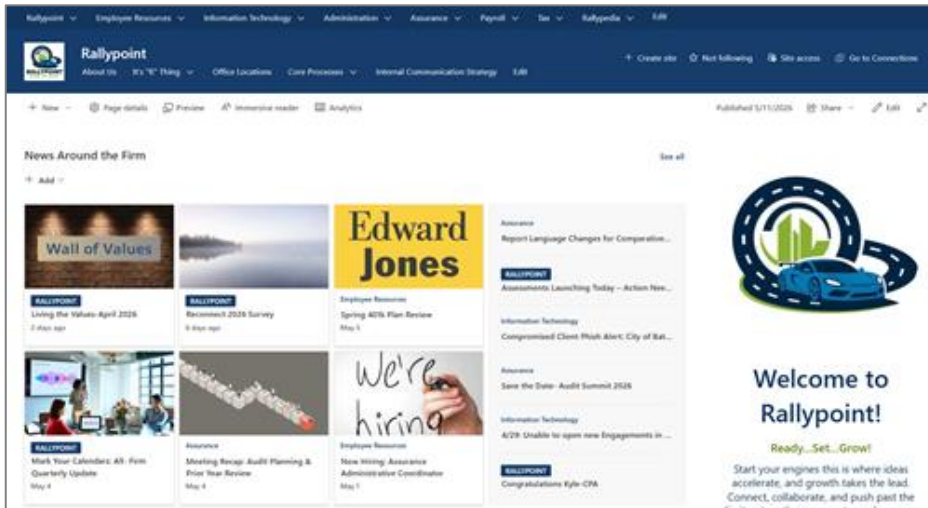
CarlsonSV is a Midwest-based accounting and advisory firm providing tax, assurance, bookkeeping, payroll, consulting, and wealth-management services to help businesses and communities thrive.

Solution

Savvy worked with CarlsonSV to build a new intranet using SharePoint Online. Savvy Worked with CarlsonSV to perform the following tasks:

- Determine an information architecture that would accommodate communication across service lines. This included determining how many sites to create and how to structure global navigation for maximum usability.
- Deploy a theme that matches the corporate brand.
- Provide a document structure that accommodates a centralized location for posting official and pertinent documentation, which can also be filtered and displayed by multiple service lines.
- Create a clear plan for step-by-step guides, helping employees in each service line follow role-specific processes.
- Establish a consistent publishing framework so leadership can regularly share corporate content, including news and announcements, events, videos, and key documents.
- Provide content author training so authors feel confident in their ability to create and post new content.

Screenshots

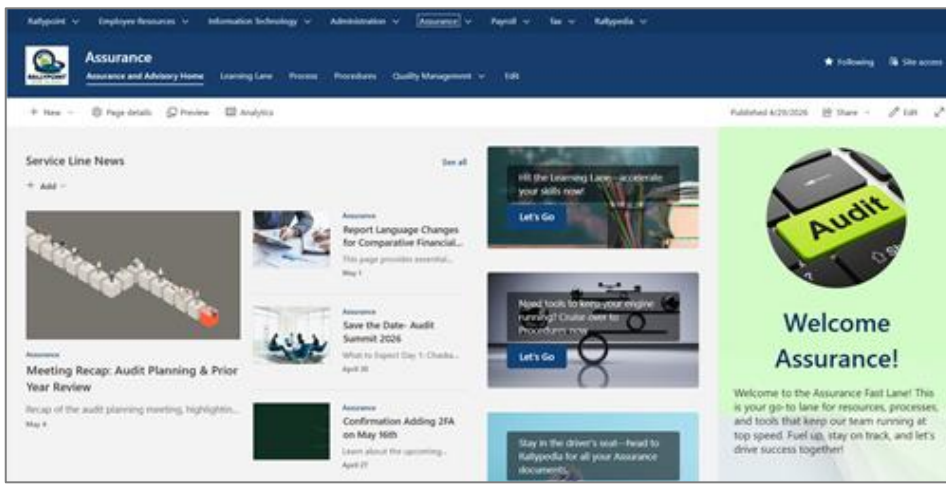


Intranet homepage with news

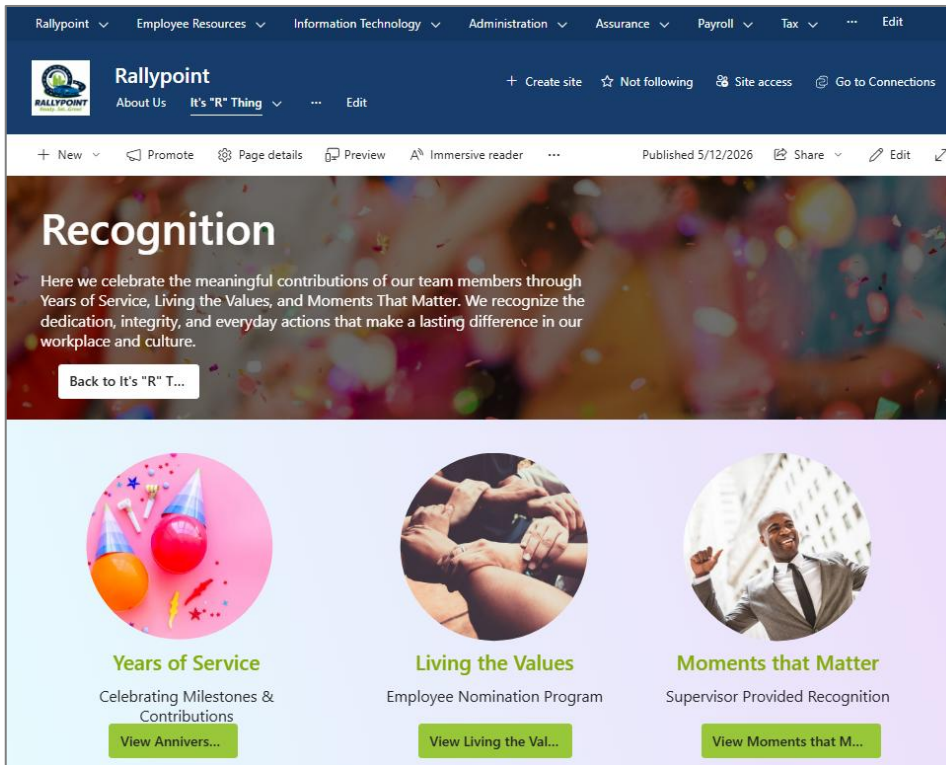
About Savvy Technical Solutions

Savvy Technical Solutions is a consulting company with a focus on helping companies improve the way they work through the use of Microsoft technologies. We are a Microsoft Solutions Partner for Modern Work as well as a certified Woman-Owned Business (WOB).

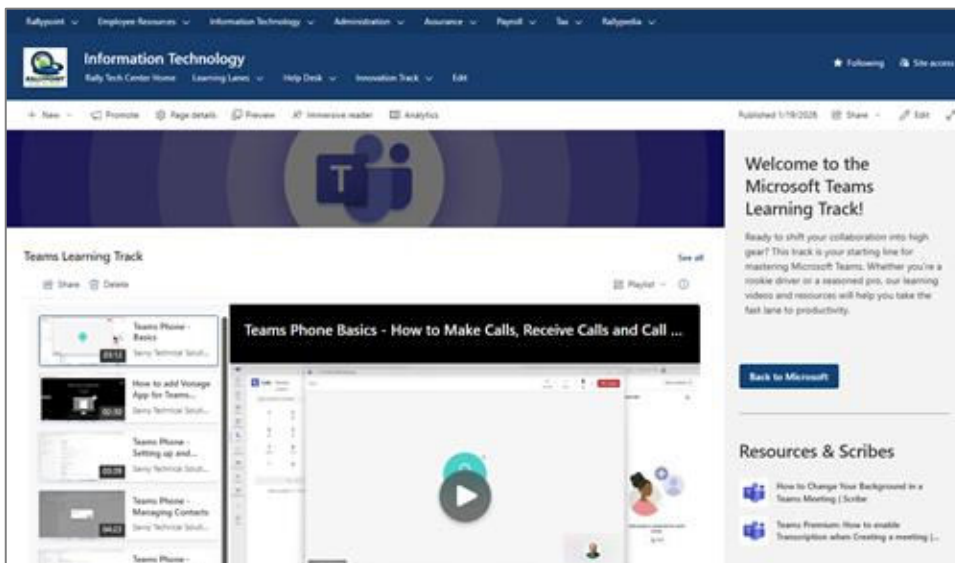




Service Line homepage



Employee Recognition Page



IT Training Resources Page with Video Library

Leadership



Our president, Becky Bertram, has been granted the prestigious MVP award by Microsoft for

SharePoint and Microsoft 365 Apps and Services every year since 2009. She is also a Microsoft Certified Trainer (MCT) and has authored multiple Microsoft professional exams.



Outcome

As a result of this new application:

- Managers feel confident that they know where to post information that the whole firm will see, rather than having to guess about the best way to communicate with employees.
- Employees don't need to read daily e-mails and Teams messages from multiple leaders at the firm but can instead view a single stream of information.
- Employees report that they can easily reference documented processes and technology training videos as part of their daily work. Centralizing this information reduces the time they spend searching for resources and helps ensure consistent, high-quality outcomes by reinforcing approved processes.
- Employee morale has improved, as employees now have a location to understand the firm's vision for the future and provide and receive recognition to and from other employees.

Conclusion

CarlsonSV partnered with Savvy Technical Solutions to build a centralized, scalable intranet solution that supports clear communication, consistent processes, and stronger employee engagement across the organization. The new intranet enables leadership to share timely and authoritative information, gives employees a reliable place to find the resources they need, and reinforces alignment around the firm's goals and values. As CarlsonSV continues to grow, this intranet provides a strong foundation for ongoing communication, knowledge sharing, and operational consistency.

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