

# A Smarter Digital Workplace

Modernizing Collaboration, Recognition, and Compliance Workflows



## Overview

Yeo & Yeo is a Michigan-based business advisory and professional services firm, known for accounting, audit, and tax, with a broader family of companies spanning technology, wealth management, medical billing, and HR advisory.

As the firm grew, they realized they needed to modernize the employee experience and reduce the day-to-day friction created by scattered information, manual processes, and siloed tools. To address these challenges, Yeo & Yeo sought a partner and chose Netsurit to deliver four connected digital transformation initiatives using SharePoint Online and the Power Platform—establishing a unified intranet, a centralized recognition experience, and automated internal workflows.

## The Challenge



### Fragmented Intranet Experience

Content was scattered across emails, shared drives, and outdated pages, with no structured navigation or search.



### Manual, disconnected recognition processes

Shout-outs' were collected via surveys, exported to Excel, manually cleaned, and lacked a centralized, searchable home inside the intranet.



### Slow, compliance-heavy CPE approvals

Requests relied on Word documents and email chains, with no visibility, tracking, or audit trail, creating delays and risk.

## The Solution

Netsurit delivered four solutions designed around one consistent principle: centralize data in SharePoint, automate workflows with Power Automate, and improve the employee experience through intuitive UX.



### SharePoint Online Hub Intranet

Built a unified, branded intranet that centralizes content, improves navigation, and enforces governance through structure and automation.



### Shout-Outs Centralized Display

Created a dynamic recognition hub in SharePoint with automated highlights and filtering, turning static data into a visible, engaging experience.



### CPE Automation Workflow

Streamlined CPE approvals with automated routing and tracking, reducing delays while strengthening compliance and auditability.

## Results That Matter



Single source of truth for content and recognition, improving discoverability and governance with 0 manual Excel processing.



Estimated 60–80% reduction in administrative processing time, 100% audit trail coverage, and the option to eliminate informal verbal approvals.



Faster publishing and consistency through standardized templates and structured intranet architecture.



Reduced admin burden on recognition submissions via automated workflows and tracking.

“Yeo & Yeo wasn’t looking to add more technology. We needed a governed digital workplace that was intuitive and actually supported how our people work. Netsurit helped us unify SharePoint Online and Power Platform in a way that reduced manual processes, improved visibility, and gave us a foundation we can continue to build on.”

### Kristi Krafft-Bellsky, Principal

Quality Control Director / Tech Innovation Team Leader  
Yeo & Yeo