






# Cloud Server Migration for Financial Services Company

## PROJECT DETAILS

-  Cloud Consulting & SI
-  Oct. 2025 - Dec. 2025
-  Less than \$10,000



*"What stood out most about working with Veracity Technologies was their combination of expertise and approachability."*

## PROJECT SUMMARY

Veracity Technologies provided SharePoint migration and implementation services for a financial services company. The team evaluated the client's OneDrive content and built a structured SharePoint architecture.

## PROJECT FEEDBACK

Veracity Technologies' work resulted in noticeable improvements in the client's collaboration, document management, and information access. The team demonstrated strong project management throughout the engagement. Veracity Technologies brought deep knowledge to the project and was responsive.



## The Client

Introduce your business and what you do there.

I'm the director of operations at Fundamental Wealth Designs, a financial services company. We provide holistic financial planning and retirement strategies, including income planning, tax planning, risk management, legacy planning, and investment management tailored to clients approaching or in retirement.

## The Challenge

What challenge were you trying to address with Veracity Technologies?

We wanted to enhance collaboration, document management, and organizational efficiency by migrating our company's file storage and sharing from OneDrive to a newly established SharePoint site designed for structured team access and centralized content management.



**Kendra Jensen**  
Director of Operations,  
Fundamental Wealth Designs



**Financial services**



**North Oaks, Minnesota**

### CLIENT RATING

**5.0**

Overall Score

Quality: 5.0

Schedule: 5.0

Cost: 5.0

Would Refer: 5.0



## The Approach

### What was the scope of their involvement?

Veracity Technologies designed and implemented a centralized SharePoint environment for our company to replace our current reliance on Microsoft OneDrive for file storage and sharing. The team evaluated our existing OneDrive content, built a structured SharePoint architecture, and configured secure access and collaboration features tailored to our operational needs. Veracity Technologies migrated all relevant files and folders from OneDrive into the new SharePoint site while ensuring proper organization, permissions, and continuity of access.

Veracity Technologies provided training, documentation, and ongoing support as part of the deliverables.

### What is the team composition?

We worked with 2–5 teammates from Veracity Technologies.

### How did you come to work with Veracity Technologies?

We found them through a referral. We chose them over other options because they had high ratings, were close to our geographic location, had pricing that fit our budget, had a great culture fit, offered good value for the cost, and had company values that aligned with ours.

### How much have you invested with them?

We spent less than \$10,000.

### What is the status of this engagement?

We worked with them from October–December 2025.





## The Outcome

### What evidence can you share that demonstrates the impact of the engagement?

The success of the SharePoint implementation can be measured through noticeable improvements in how our organization collaborates, manages documents, and accesses information. Our teams experienced smoother collaboration with shared workspaces, clearer document ownership, and easier ways to work together without relying on email attachments or scattered file versions. Employees found information more quickly thanks to better organization, metadata, and search capabilities.

We saw more consistent and secure handling of files, with permissions that matched team roles and reduced accidental oversharing. Operationally, we benefited from reduced time spent hunting for documents, fewer workflow bottlenecks, and more efficient processes supported by the centralized structure. Finally, the migration resulted in a cleaner, more organized content environment with unnecessary or outdated files removed and remaining content clearly structured for long-term use.

Overall, the measurable success came from improved collaboration, stronger governance, streamlined workflows, better content organization, and a more secure and scalable foundation for our company's growth. We observed clear, qualitative improvements across several areas of our organization's workflows. Users reported that documents were easier and quicker to locate thanks to the structured organization and enhanced search capabilities within SharePoint. Teams increasingly relied on shared document libraries, which naturally reduced the need to send files back and forth via email. Additionally, overall engagement with the centralized SharePoint environment rose as staff adopted the new, streamlined collaboration experience.

### How did Veracity Technologies perform from a project management standpoint?





# Veracity Technologies

Veracity Technologies demonstrated strong project management throughout the engagement. Communication was clear and consistent, expectations were set early, and each phase of the project was organized in a way that kept stakeholders informed and aligned. The team provided regular updates, outlined upcoming milestones, and proactively addressed any questions or adjustments along the way.

Despite the natural complexities that came with migrating content and redesigning workflows, Veracity Technologies maintained steady progress and delivered the work within the agreed-upon timeline. Overall, their structured approach and dependable follow-through made the implementation process smooth and well-coordinated.

## What did you find most impressive about them?

What stood out most about working with Veracity Technologies was their combination of expertise and approachability. They brought a clear depth of knowledge to the project, yet explained everything in a way that was easy for everyone to understand. Their responsiveness and willingness to adapt were especially impressive, and any questions, changes, or new considerations were met with thoughtful guidance and practical solutions.

It never felt like a one-size-fits-all engagement because Veracity Technologies took the time to understand our organization's needs and tailored their approach accordingly. That level of attentiveness and partnership made the entire experience smooth, efficient, and genuinely collaborative.

## Are there any areas they could improve?

They executed the project exceptionally well, and there was nothing we identified as needing improvement. Their communication was clear, their approach was well-organized, and every phase of the engagement was handled with professionalism and attention to detail. The team consistently met expectations, addressed





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questions promptly, and delivered exactly what was promised. Overall, the experience was smooth, efficient, and highly effective, and we wouldn't suggest any changes to how the project was managed or delivered.



[info@veracitytech.com](mailto:info@veracitytech.com)

9529417333

[www.veracitytech.com](http://www.veracitytech.com)