🧹 CASE STUDY: Backend Audit for ASYST Enterprise

Title: *Diagnosing Delivery Drag Across Two Divisions*
Subtitle: How SortedOps mapped and scoped a backend infrastructure rebuild for a CFO firm scaling through webinars and client ops

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🚨 The Problem

ASYST Enterprise, a growing CFO advisory firm, had strong offers and tools in place — Zoho Suite, Boost.space, Taskade — but the backend wasn't keeping up:

- No lead-to-client CRM pipeline or lifecycle automation

- Manual client onboarding with no standardization

- Disconnected systems and no automation glue

- Boost.space backend not deployed

- No centralized file system or SOP hub

They weren't lacking tools. They were lacking system clarity.

🛠️ The SortedOps Approach

Brought in for a focused backend audit, SortedOps mapped the current ops chaos, diagnosed friction points, and designed a phase-by-phase rebuild plan:

- Audited internal workflows across lead gen, onboarding, and delivery

- Delivered a **visual systems map** showing key breakdowns

- Created a standardized onboarding checklist template

- Mapped Zoho CRM + Forms automation flows to streamline lead → client conversion

- Scoped a Phase 2 backend hub using Boost.space for centralized delivery execution

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💡 The Outcome

- ✅ Full visibility into what's broken, missing, and duct-taped

- ⚙️ Strategic action plan for clean ops rebuild (no guesswork)

- 📄 Blueprint ready for Sprint execution across multiple systems

- 🧩 Team enabled to scale onboarding and delivery with consistency

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🤝 Why This Matters to Partners

This wasn't "just an audit." It was **ops architecture at the ground level.**

If your clients are scaling across multiple services or tools but delivery feels disjointed:

> SortedOps plugs in as the backend architect to **map the mess and design what's next**.

→ **Need a backend teardown before your next build?**

Book a Partner Discovery Call

Audit → Sprint → Retainer. One clear backend lifecycle. Zero chaos.