🧹 CASE STUDY: Follow-Up Automation

Title: *Automating Client Check-Ins Without adding Another SaaS*
Subtitle: How SortedOps helped a national commercial cleaning company scale account management with zero subscriptions and clean systems logic.

🚨 The Problem

A national commercial cleaning company was struggling with a manual client check-in process:

- Each account manager was juggling hundreds of clients manually

- No tracking of check-in dates or message history

- High-value clients weren't getting the proactive service they were paying for

- Automation tools like HubSpot or Mailchimp were overkill (and overbudget)

- No consistent structure — just inbox chaos

Result? Follow-ups were reactive, inconsistent, and prone to slipping through the cracks.

🛠️ The SortedOps Approach

They didn't need more software. They needed better infrastructure.

As their embedded systems partner, SortedOps designed a no-fluff solution using only the Google stack — Sheets, Gmail, and Apps Script.

- Built a single spreadsheet template for each AM, pre-filled with clients

- Classified follow-up frequency automatically based on revenue bands (2m, 3m, 4m, 6m)

- Created a custom Google Apps Script that runs daily to:

  - Draft emails using Gmail

  - Update next follow-up date

      ○   Track status and check-in history

No new tools. No subscriptions. Just a permanent, scalable backend workflow.

💡 The Outcome

- ✅ 100% of clients now receive timely, proactive check-ins

- ⚡ Account managers do zero manual follow-up tracking

- 💸 Zero new software spend — everything runs natively on Google

- 🧠 Fully branded Gmail drafts with profile photo and CMOS signature

- 🔄 Dates and frequencies auto-managed for the long term

This wasn't just automation — it was backend infrastructure delivered with precision

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🤝 Why This Matters to Partners

Whether you're a **creative agency**, **ERP team**, or **consultant** dealing with delivery drag:

> SortedOps plugs into the backend — not to duct-tape a tool, but to **rebuild the system**.

We handle the spreadsheets, the logic, the scripts, and the boring stuff that makes your client's ops feel effortless.

→ Want us behind the scenes on your next client infrastructure upgrade?

Book a Partner Discovery Call

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