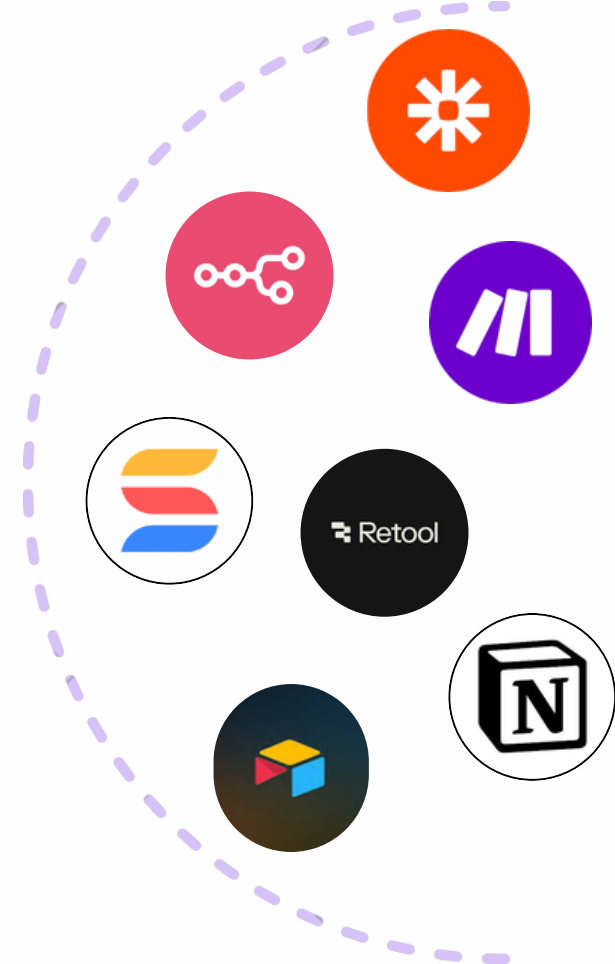
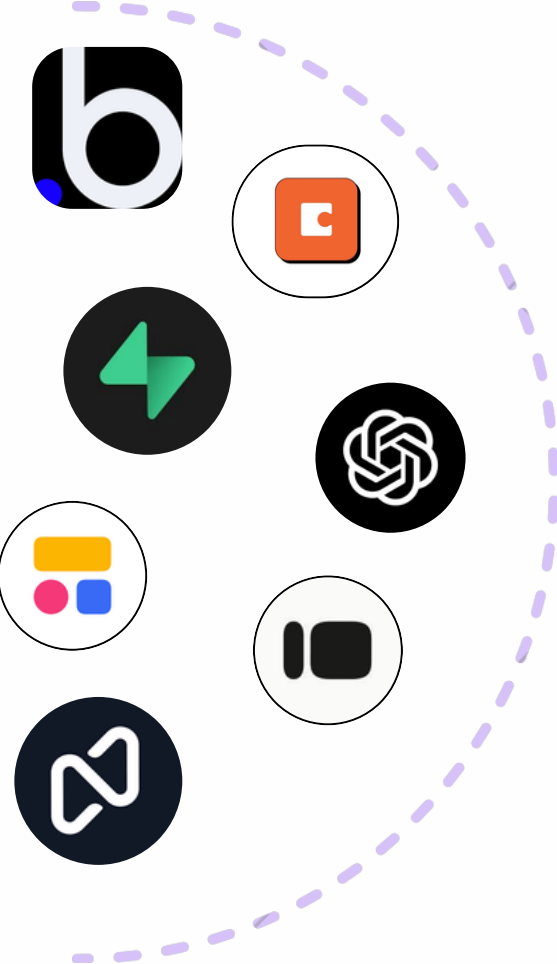




YOUR AI AUTOMATION PARTNER

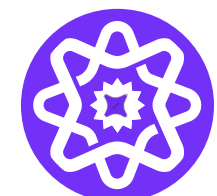
We Are A **FULL-SCALE AI Automation Company** 

This portfolio showcases some of our most impactful and transformative projects, built with speed, purpose, and scalability. It reflects who we are, what drives us, and the breadth of solutions we bring to modern businesses. You'll gain insight into our development philosophy, our robust global partnerships with industry leaders, and our unwavering commitment to driving tangible business outcomes. **At SBD, we believe in building long-term associations with our clients, anchored in trust, innovation, and shared success.**



PORTFOLIO

DISCLAIMER:  **Tell us your **bottlenecks**, and we'll craft a plan within 48 hours!**



YOUR AI AUTOMATION PARTNER

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GET IN TOUCH

Why work with SBD over any other automation agency?

Because we don't just build software or workflows. **We dive deep into your business - understanding your chaos, your people, and your workflows and then build lean, custom systems that are adopted.** Most software agencies throw tools at the problem. We build what fits, not what's trending. **We're fast, hands-on, and brutally practical.**

No bloated tech stack, no endless dev cycles - just systems that work, and evolve with you.

And we don't disappear after delivery. We're in the trenches with you till it's running like a machine.

We build systems that don't just "look good" - they run the business.

Tailored. Practical. Adopted. ROI from day one.

Table of Contents – Company Portfolio

1. WHY SBD?

- WHO WE ARE AT SBD
- WHAT WE BELIEVE IN

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- WHAT WE DO
- PROBLEMS WE SOLVE
- END-TO-END SYSTEMS THINKING
- OUR SERVICES & SOLUTIONS

3. OUR TECH STACK

- PLATFORMS & TOOLS WE USE
- INDUSTRY TECH PARTNERS & COLLABORATORS
- WHY LOW-CODE / NO-CODE?

4. CASE STUDIES

- REAL BUSINESSES. REAL RESULTS. TOP 10 IMPACT STORIES ACROSS:
- INDUSTRIES & BUSINESS TYPES
 - PROBLEM COMPLEXITY



5. OUR APPROACH


- DISCOVERY → AUDIT → BUILD → SCALE
- OUR CREDENTIALS & TEAM
- SUPPORT & LONG-TERM THINKING
- NEXT STEPS TO GET STARTED





We are transformation partners for B2B businesses. We focus on building scalable AI systems and automation infrastructure for the **ops layer** in any industry.

10 TEAM MEMBERS **3+** YEARS OF EXPERIENCE **50+** CLIENTS

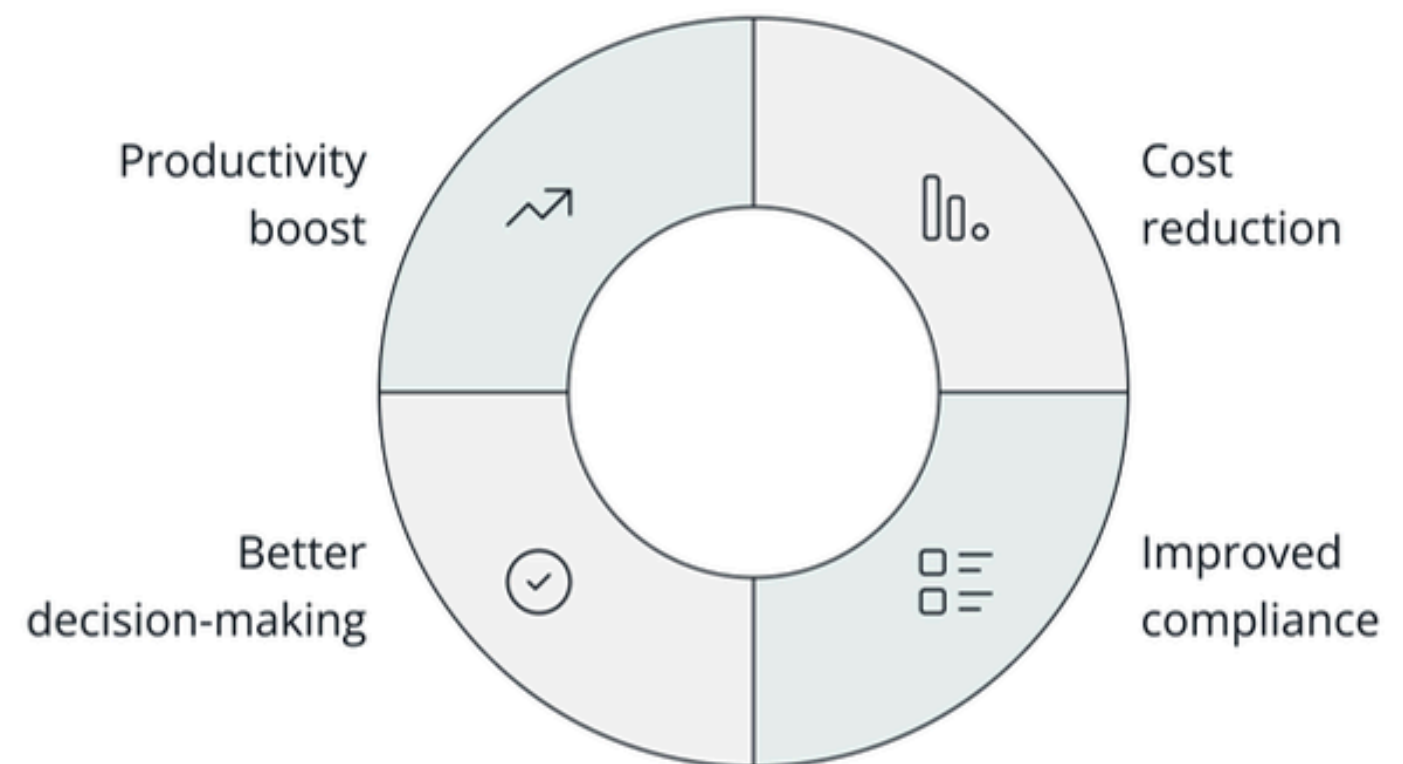
 We're here to make life easier for SMBs & large companies, helping you scale with digital solutions that work specifically for you. With over 3 years of experience and 1000+ automated workflows under our belt, we're all about building custom systems that don't just streamline processes - they drive real, measurable results for your business. 

 It's time to **ditch traditional software** and take a leap toward a **future-ready system** that's scalable and optimized for the long haul.

WHO WE ARE

 Think of us as your operations & process transformation partners. We dig deep to understand how your business operates, uncover those time-draining gaps, inefficiencies and build exactly what you need - no unnecessary frills, just scalable, high-ROI solutions that fit like a glove. 

Benefits Of AI Business Process Automation



2025



WHO WE WORK WITH

(IF THIS SOUNDS LIKE YOU, WE'LL LIKELY GET ALONG.)

B2B COMPANIES | TEAMS | FIRMS | AGENCIES | PARTNERS | FOUNDERS

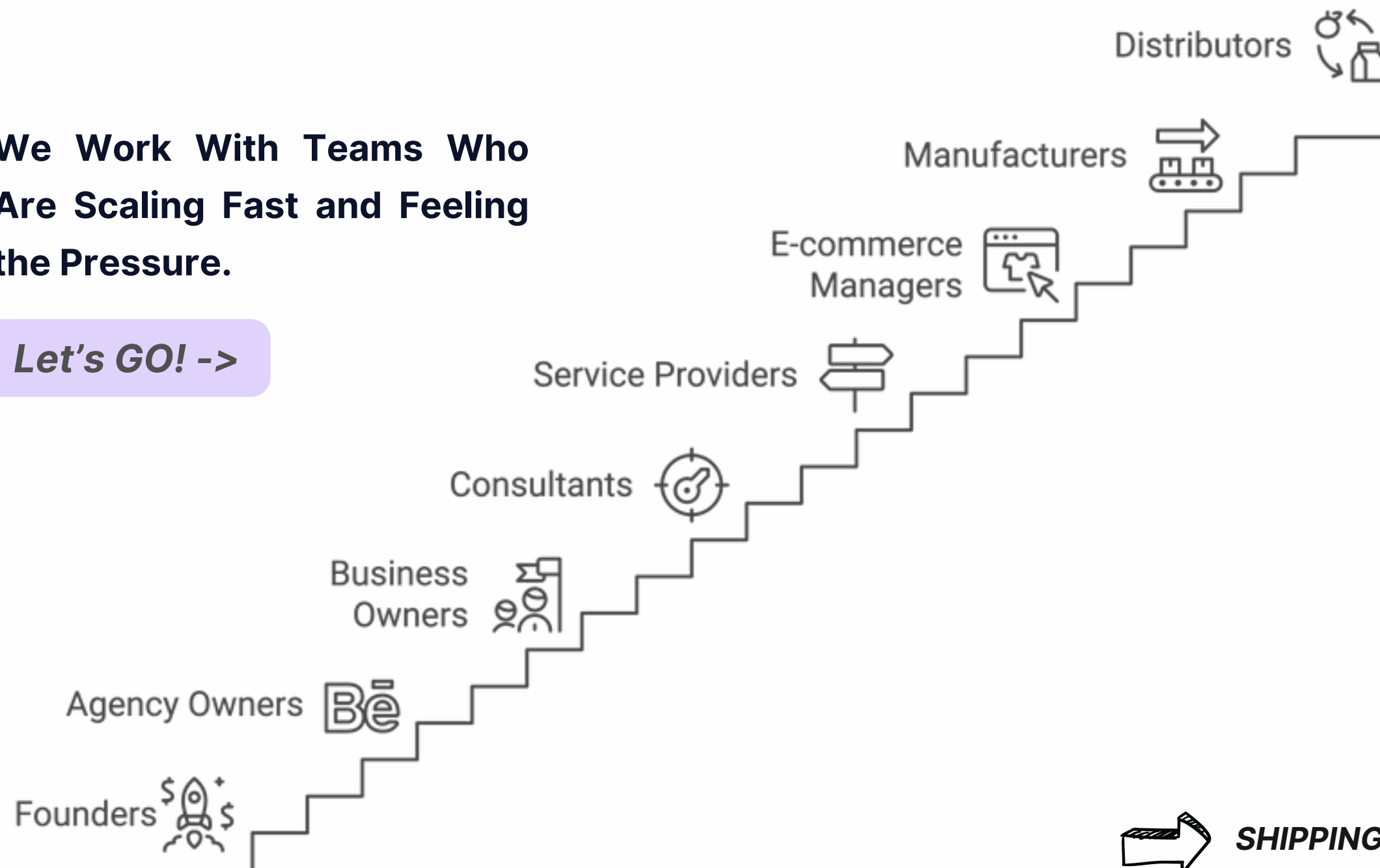
GET YOUR CUSTOM AI & AUTOMATION INFRASTRUCTURE AND SYSTEMS

50+ B2B BUSINESSES HAVE SEEN SUCCESS

JOIN THEM NOW

We Work With Teams Who Are Scaling Fast and Feeling the Pressure.

Let's GO! ->



You're doing great work. But behind the scenes? It's messy. Manual. Slower than it should be. You're buried under ops, scattered tools, or bottlenecks. That's where we step in.



SHIPPING TOOLS THAT WILL SIMPLIFY YOUR WORK MANAGEMNT



SHIPPING SOLUTIONS

We Help You Run Your Business on Autopilot using AI

Custom Software

AI Agents & Workflows

Internal Tools

Admin Panel & Interface

Dashboards & Portals

AI System or App

End to End Operations Infrastructure

Custom API Integration & Deployment

Custom Forms & Interfaces

Back Office Tools & Systems

AI Powered Chatbots

Work Management App

- Team productivity
- Customer experience
- Scalability and integration
- Cost reduction
- Digital transformation

DEVELOPMENT SOLUTIONS STARTING FROM AS LOW AS **500 USD ONWARDS,** AS A ONE-TIME BUILD COST

THE IMPACT IS NEVER SURFACE-LEVEL. IT RIPPLES THROUGH THE WHOLE BUSINESS - FROM INTERNAL OPS TO CUSTOMER INTERACTIONS.



YOUR AI AUTOMATION PARTNER

2025

GET IN TOUCH

Automation isn't limited to just one department.

At SBD, our AI-orchestrated systems touch every part of your business.

Core Business Functions AI + Automation Can Transform: **Simplified**

⚙️ Whether it's client experience, internal ops, or finance - every function that moves your business forward.

Internal Operations & Admin

- Request approvals (IT, finance, admin, etc.)
- Internal resource booking (assets, rooms, etc.)
- SOP workflows & task automations
- Cross-functional coordination systems

Customer Engagement & Retention

- Drip journeys post-purchase or sign-up
- Feedback loops and satisfaction tracking
- Loyalty program automations
- AI-driven engagement campaigns via WhatsApp/email

Finance & Accounts

- Invoice automation & payment reminders
- Reconciliation reports & collection workflows
- Budget tracking dashboards
- Vendor payout automations

Customer Support & Service Ops

- Ticketing, routing, and SLA automation
- Self-service bots (WhatsApp/Chat)
- Status update automation for customers
- Escalation triggers & service workflows



Sales & Lead Management

- Lead capture, qualification & nurturing
- Follow-ups across email/WhatsApp/CRM
- Sales pipeline visibility & performance tracking
- Automated proposal sharing, reminders, and closure workflows

Human Resources (HR) & People Ops

- Hiring pipelines & interview coordination
- Onboarding/offboarding workflows
- Leave, attendance & payroll integrations
- Internal policy bots & helpdesk

Project & Task Management

- Project progress dashboards
- Auto-generated status updates
- Task delegation & deadline tracking
- Workload balancing & team visibility

Client Communication & Relationship Management

- Onboarding journeys with documents & SOPs
- Periodic check-ins, feedback loops
- Project milestone updates
- Centralized client interaction logs

Compliance, Legal & Documentation

- Document version control & approvals
- Contract generation & signature tracking
- Compliance checklist automation
- Audit-ready workflows & access logs

Data, Reporting & Business Intelligence

- Cross-functional reporting dashboards
- Weekly/monthly auto-summaries
- Department-wise KPIs & insights
- Predictive analytics using AI



STREAMLINING PROCESSES WITH AI AUTOMATION

We Build Scalable Systems & Workflows Tailored For Your Business using AI, Low Code & No Code Stack

We have Partnered with Global Industry Leaders



BUILDING WITH THE BEST

YOUR TECH STACK

- Checkmarks and text describing benefits: Globally Adopted, Scalable, Strong Developer Community, Robust APIs & Security, Round the clock support, Constant Upgrades & Features in the Road Map, Flexible Integrations & Pricing, Negligible Downtime.

2025

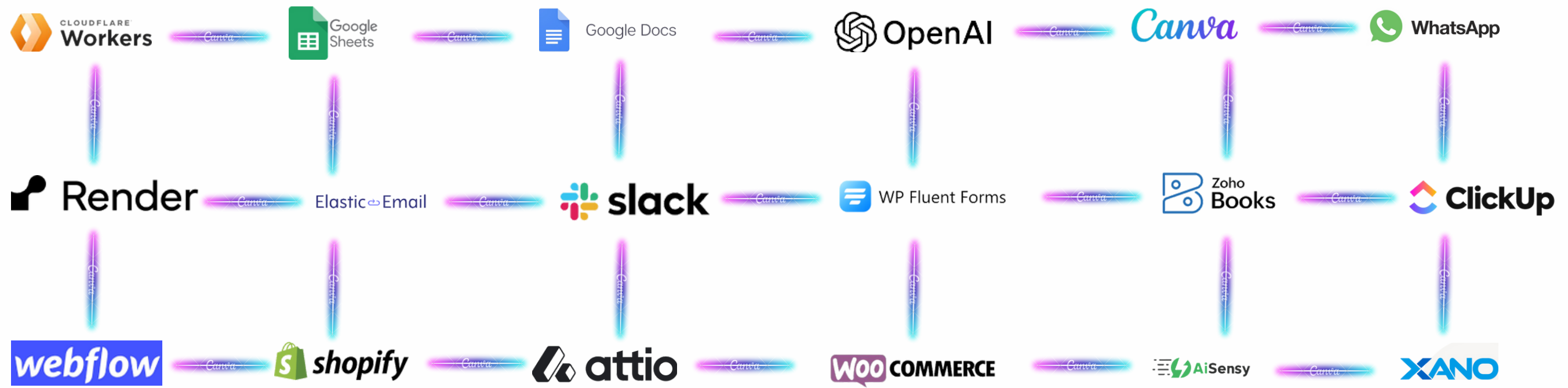


LEVERAGING THE POWER OF ROBUST APIs

Effortless Connections: Any App, Any System

Integrating Over 1000+ Apps

End Use Cases: Slack Messages; Task Updates; Sheet Data Sync; Email & WhatsApp Notifications; CRM Updates; Payment Tracking; Inventory Sync; Shipping Alerts; Customer Support Tickets; Enterprise Reporting; SMS Alerts; Data Migration.



BOLD CLAIM

We can integrate any app with any other, including custom solutions.

No documentation? No problem.

We'll figure it out. You can trust us.

Imagine your entire system functioning as one streamlined unit. Ready to connect the dots?

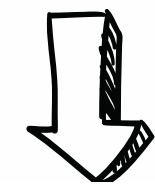
Benefits of Our API Integration Expertise

- Unified Systems: All your tools working together, effortlessly.
Cost Efficiency: Eliminate manual errors and reduce operational expenses.
Data Consistency: Reliable, accurate, and synchronized information everywhere.
Scalable Solutions: Built to grow as your needs evolve.



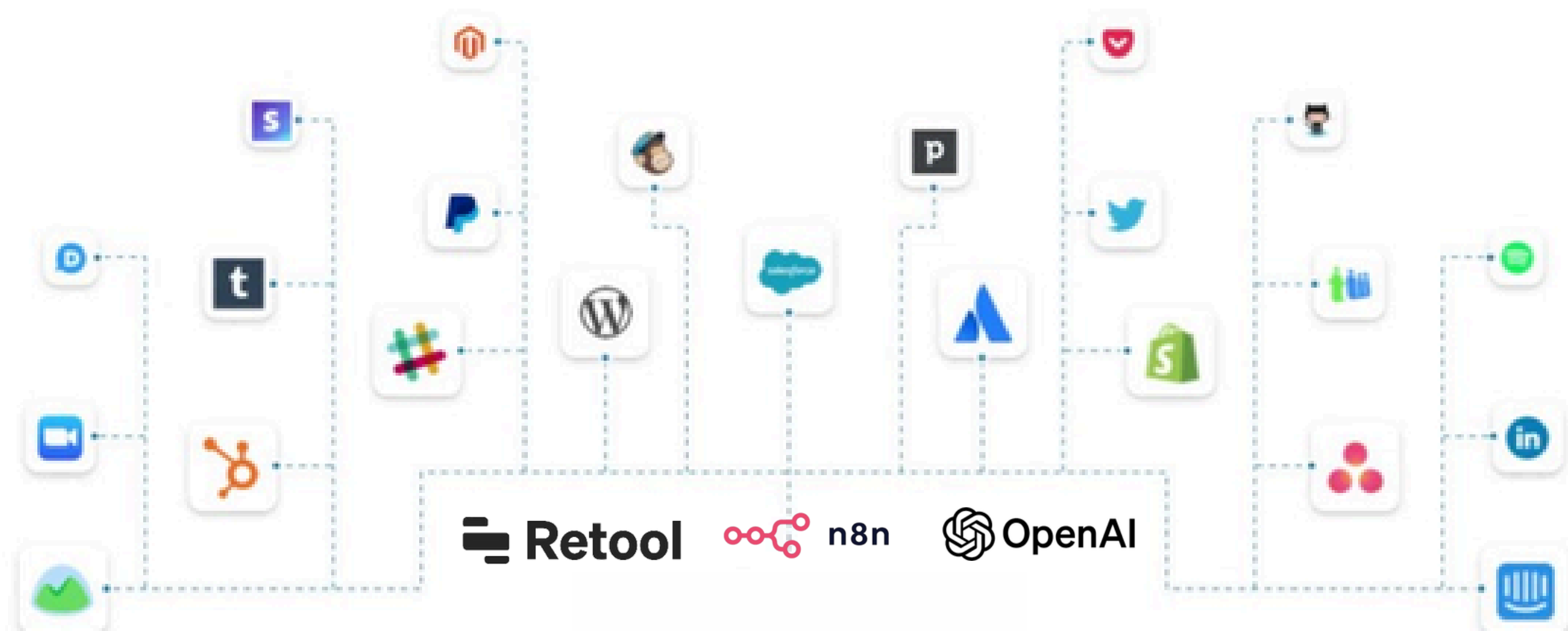
WHY CHOOSE AI, LOW CODE, OR NO CODE TECH STACK OVER LEGACY STACK ?

Your Team can grow without the burden of you increasing the team size in ops



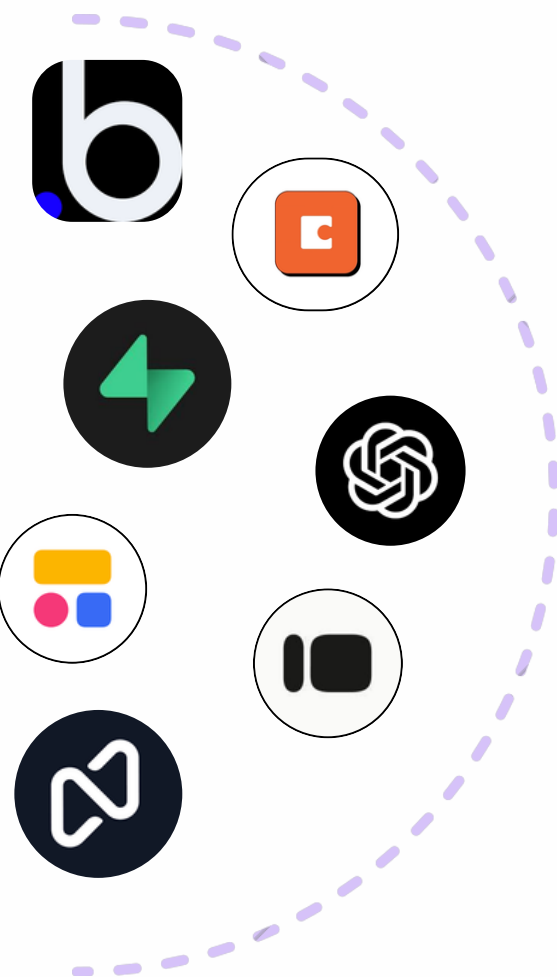
We Make AI Work For You

- ✓ Scalable
- ✓ Cost-Effective
- ✓ Faster Time to Deploy & Rapid Prototyping
- ✓ Less Maintenance Required
- ✓ Flexible Integrations
- ✓ Enhanced Focus on Business Needs
- ✓ Accelerated Development
- ✓ Empowers Non-Technical Teams

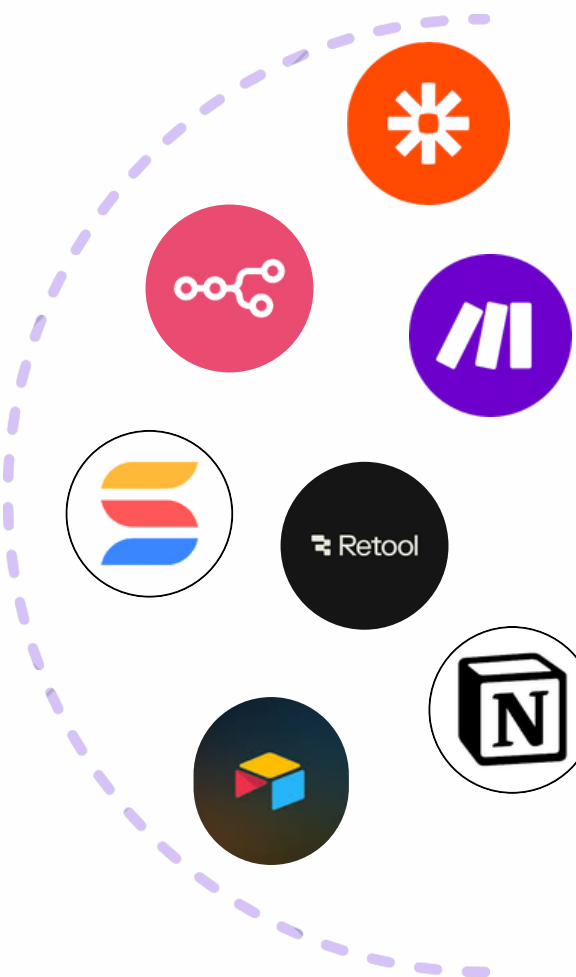


💡 **With our mastery in API integration**, you don't need to settle for siloed systems or manual tasks. We'll build workflows that sync your operations, save time, and eliminate friction.





CASE STUDIES ->



We Are A **FULL-SCALE AI Automation Company** 

- Video Walkthroughs
- Tech Stack
- Project Demos
- Solutions
- Workflows
- ROI
- Idea To Concept
- Challenges
- Future Scope



YOUR AI AUTOMATION PARTNER

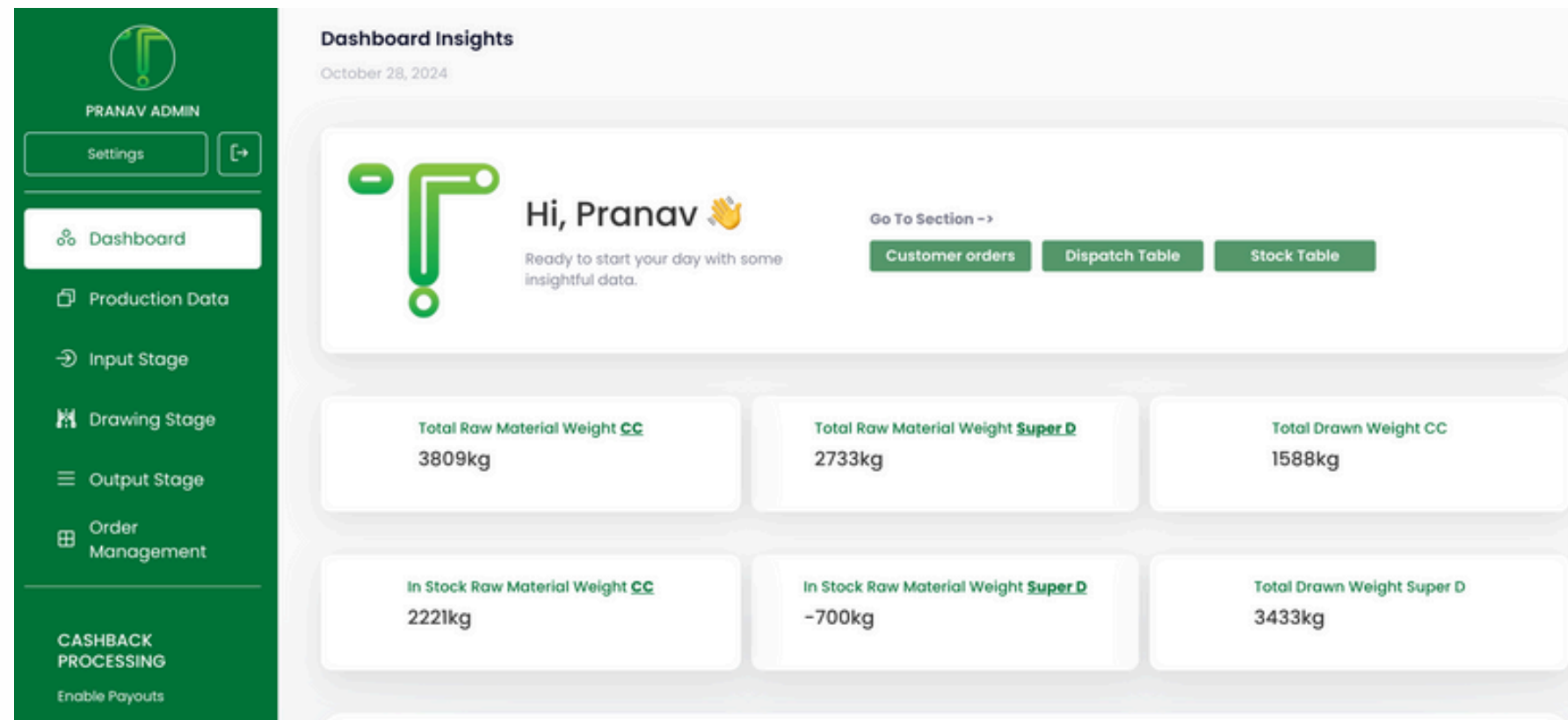
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GET IN TOUCH

Why work with SBD over any other automation agency?

- 🎥 Title: Streamlining B2B Operations with SmartSuite: **Work Management App Built on Smart Suite** [Watch Video](#)
- 🎥 Title: Custom Finance Dashboard for Building Supply Companies: **Concept Walkthrough** [Watch Video](#)
- 🎥 Title: Automated Whatsapp Payment Reminder System - **Built on Retool for Appliance Distributors** [Watch Video](#)
- 🎥 Title: Internal Speaker Management Tool - Built for Fane to **Manage Speakers & Events** [Watch Video](#)
- 🎥 Title: Building an **AI Agent for Lead Analysis, CRM Updates & Lead Follow Up** [Watch Video](#)
- 🎥 Title: **Automated Product Marketing Tool** for Whatsapp Campaigns with Dynamic Receptient List [Watch Video](#)
- 🎥 Title: Cash flow & Expense **Anlytics with Dashboard Metrics & Insights** [Watch Video](#)
- 🎥 Title: Concept of a Tailored **Internal Tool & Admin Panel for Ops Teams** [Watch Video](#)
- 🎥 Title: Supercharge your Marketing Agency with **Automated Lead Capture & Follow Up Workflow** [Watch Video](#)
- 🎥 Title: Concept Tool to **Automate Contract & Presentation Document Creation** with Dynamic Data [Watch Video](#)
- 🎥 Title: Agent **that sends LinkedIn Outreach Invites and Follow Up Emails** [Watch Video](#)



INTERNAL WEB APP



Solution Summary: We developed a robust dashboard using Bubble.io, enabling comprehensive data insights and real-time tracking across various production stages. With cloud integration through Cloudflare Workers for report generation and PrintNode API for direct printing, we achieved a seamless and fully automated setup.

Future Scope

While the current solution has revolutionised the business's operations, there's still more we can do:

- **Advanced Analytics:** Incorporate predictive analysis to forecast demand and refine the production plan even further.
- **Customer Portal:** Develop a customer interface for real-time order tracking and allow customers to place order requests.
- **Enhanced ERP Integration:** Seamlessly connect with existing accounting and billing software to unify operations.

CASE STUDY 1: WEB APP FOR A MANUFACTURER - MULTI-USER DASHBOARD

Objective: Streamline data tracking and order movement insights across production stages.

Client Context: A copper wire manufacturer had a complex and manual process for tracking production data, resulting in inefficiencies and delays in order fulfilment. The goal was to build a centralised dashboard that simplifies data monitoring and order management.

Challenges

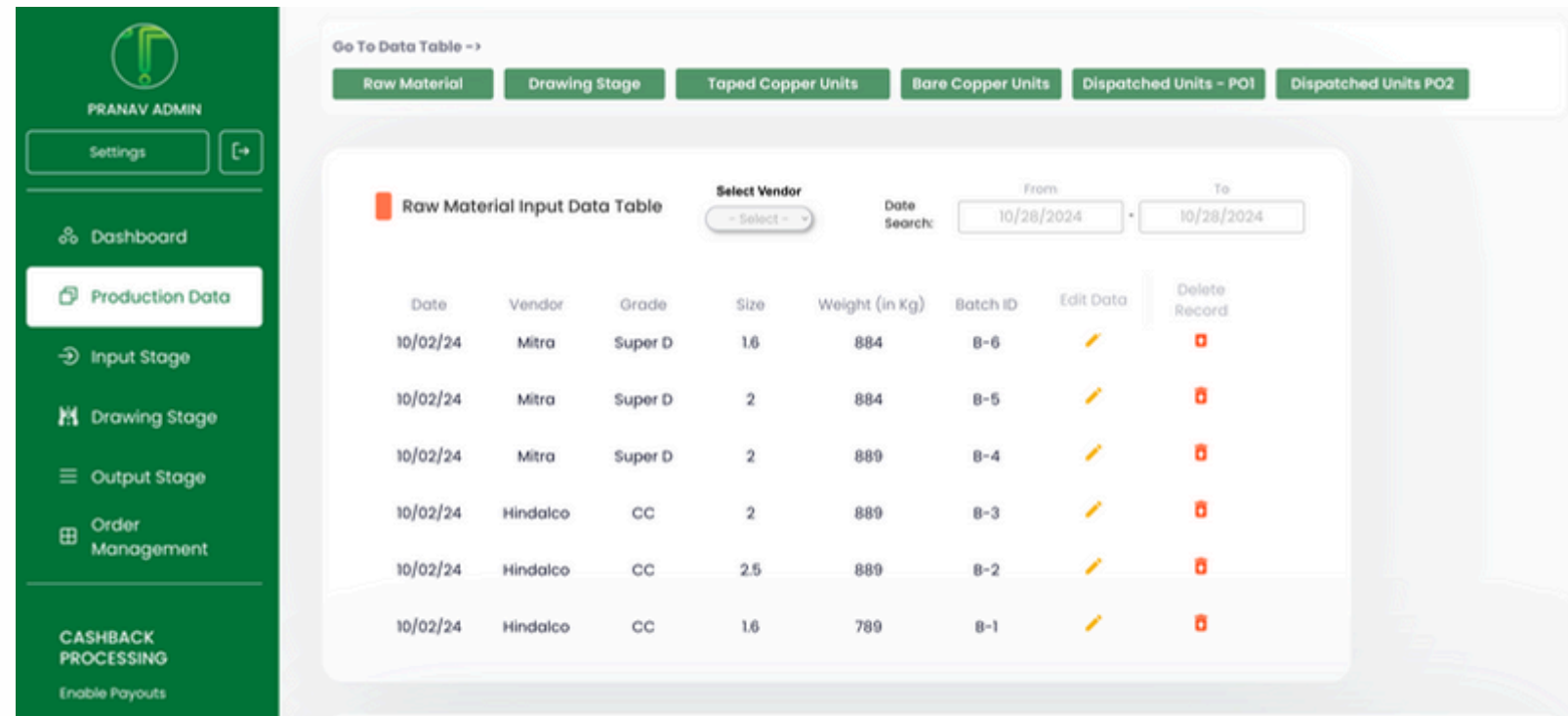
- Disjointed data systems lead to errors.
- Manual tracking is causing delays in the dispatch process.
- High dependency on team members for real-time updates.

Solutions Delivered:

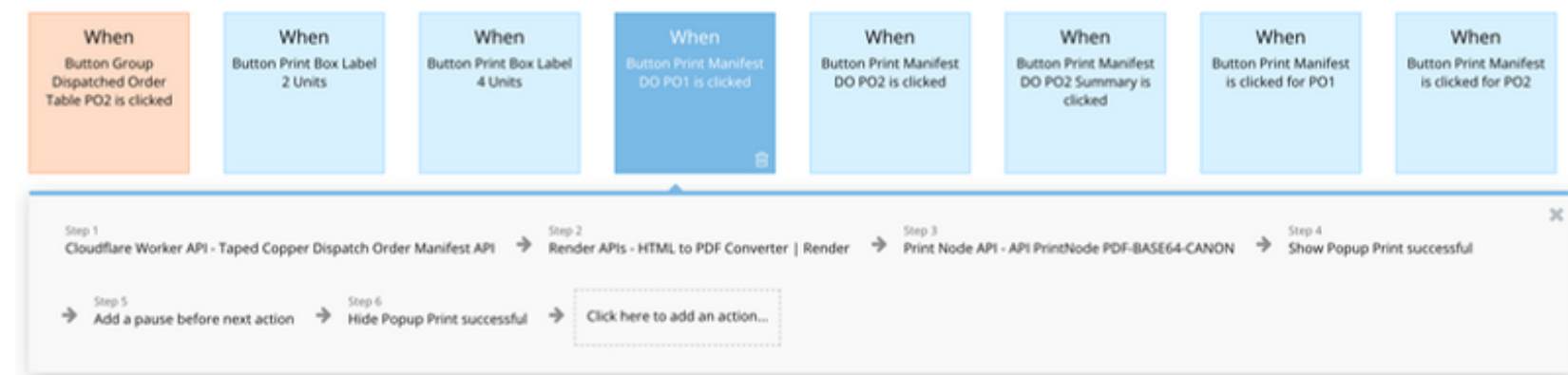
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PRODUCTION DASHBOARD



Workflows



Effort Behind the Scenes

This wasn't just about building software - it was about truly understanding the business. When you work with us, it's not just about building - we become your partner in reimagining how your business runs.

- **On-Site Visits:** We spent time at the factory, observing every stage of the production live in action.
- **Team Interactions:** Held multiple rounds of discussions with team members across departments to map out processes and pain points.
- **Deep Immersion:** Got hands-on with their daily challenges to ensure the solution wasn't just functional but transformational.



BOOK A DEMO

Tech Stack

bubble

Render

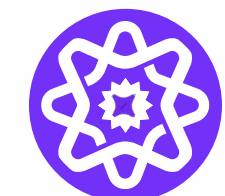
PrintNode

CLOUDFLARE Workers

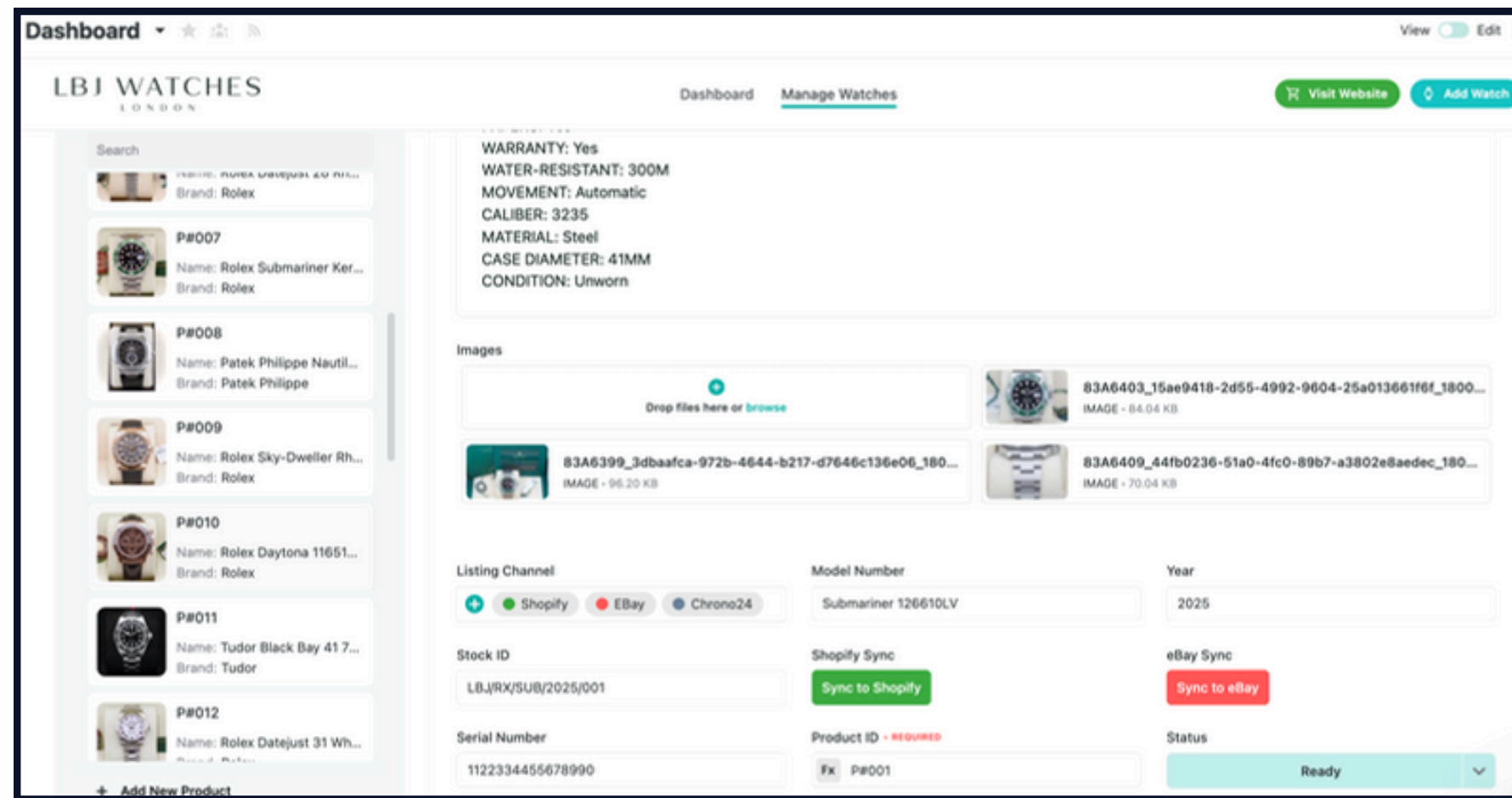
- **Platform:** Bubble.io
- **Integrations:** Cloudflare Workers, Render for label generation, PrintNode API for printing, Postman for API testing.

Results

- Robust Digital Infrastructure
- 45% reduction in order processing time.
- 60% improvement in data accuracy.
- Enhanced traceability across production stages.



SALES CHANNEL SYNC TOOL



Solution Summary: A custom backend tool that gives the business one control panel for product operations, enabling seamless, real-time publishing and syncing of product data across multiple storefronts, we achieved a seamless and fully automated setup.

Future Scope

While the current solution has revolutionised the business's operations, there's still more we can do:

- Build an AI tool to predict the optimal buying price based on the product lifecycle & past trends.
- Automate Instagram/DM sales replies using inventory-aware IG bots.

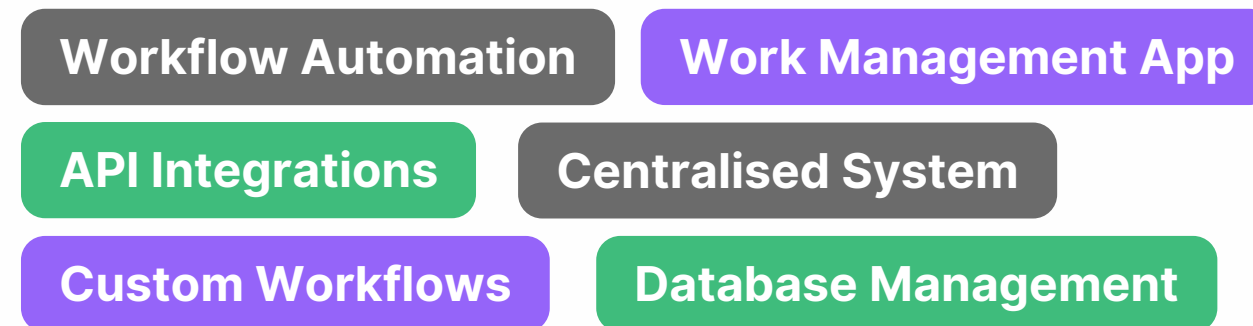
CASE STUDY 2: STREAMLINING INVENTORY & SALES CHANNEL SYNC FOR PRODUCTS

Client Context: A fast-growing D2C watch reseller managing operations across different online sales channels. Each platform had its own format for product attributes (titles, prices, availability), which required separate manual updates - leading to operational overload and delays in launching new products.

Challenges

- No single source of truth for inventory & product data
- Each sales channel had its own formatting rules and catalogue standards
- Product updates had to be done manually on each platform
- High risk of out-of-stock products still being listed on one or more channels
- No visibility into what's live where

Solutions Delivered:

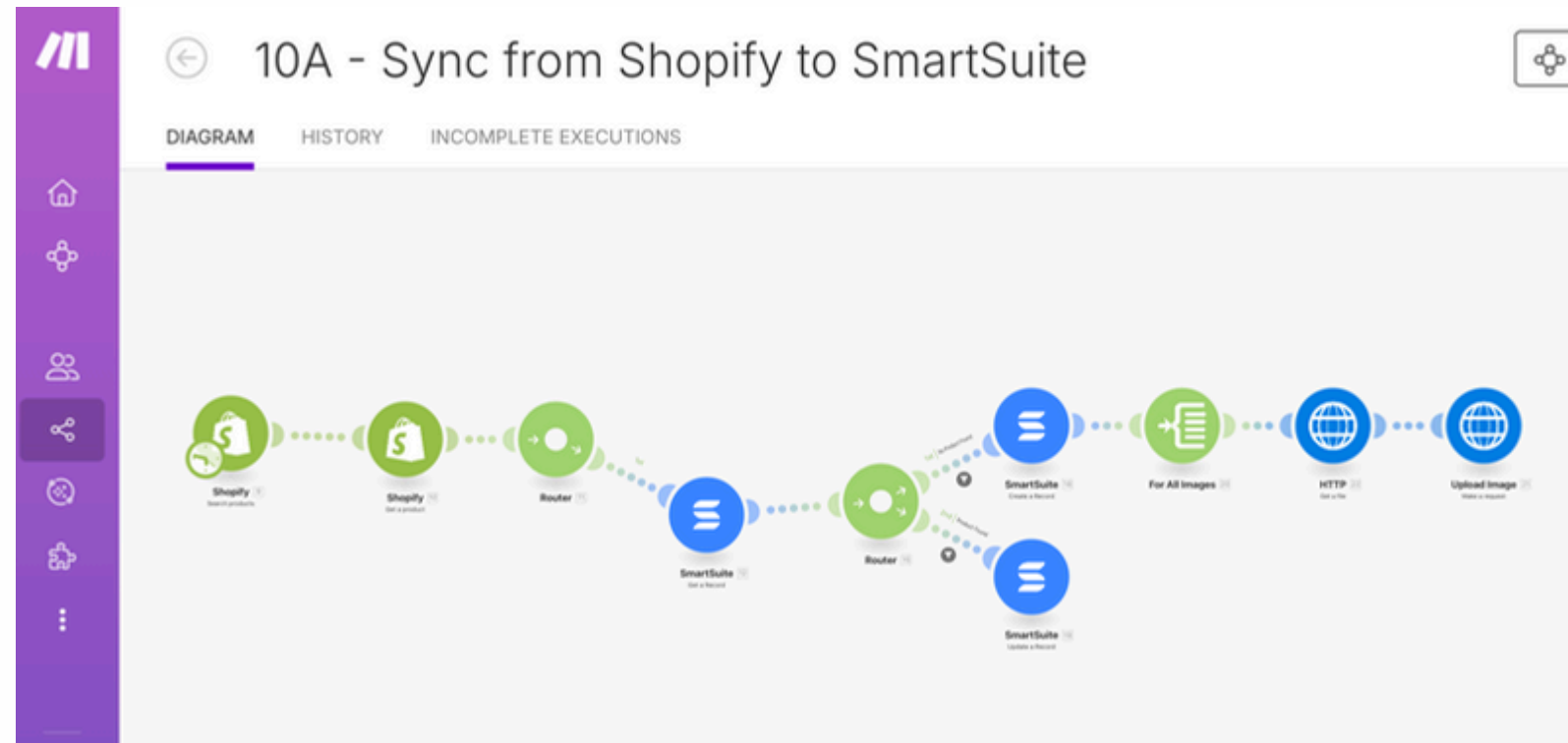


BOOK A DEMO

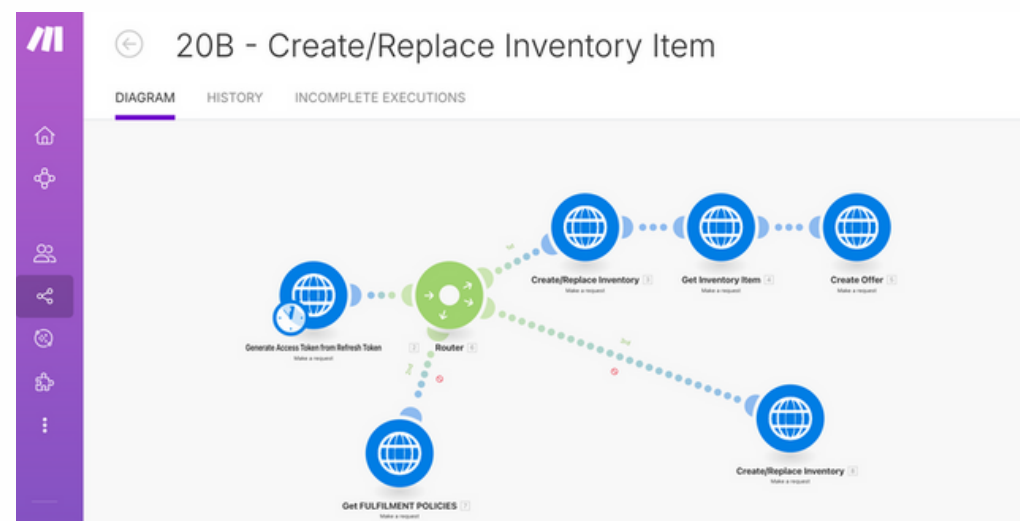
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Sales Channel Product Sync Workflow



Product CRUD Workflow



Effort Behind the Scenes

This wasn't just about building software - it was about truly understanding the business. When you work with us, it's not just about building - we become your partner in reimagining how your business runs.

- Deep workflow mapping with the client team to understand all platform rules
- Created a flexible data schema to accommodate future channel expansion
- Reverse-engineered existing product listings to clean, tag, and unify them
- Built custom logic for dynamic image & meta generation

Tech Stack



- **Platform:** Smart Suite
- **Integrations:** Make.com, Shopify APIs, eBay APIs, Hubspot APIs, Chrono 24 APIs & Missive App.

Results

- 80% reduction in time spent updating product details across platforms
- 0 inventory mismatch cases reported in the last 90 days
- 2x faster product launch time
- Team can now launch across platforms in under 20 minutes vs. 2-3 hours before



BOOK A DEMO

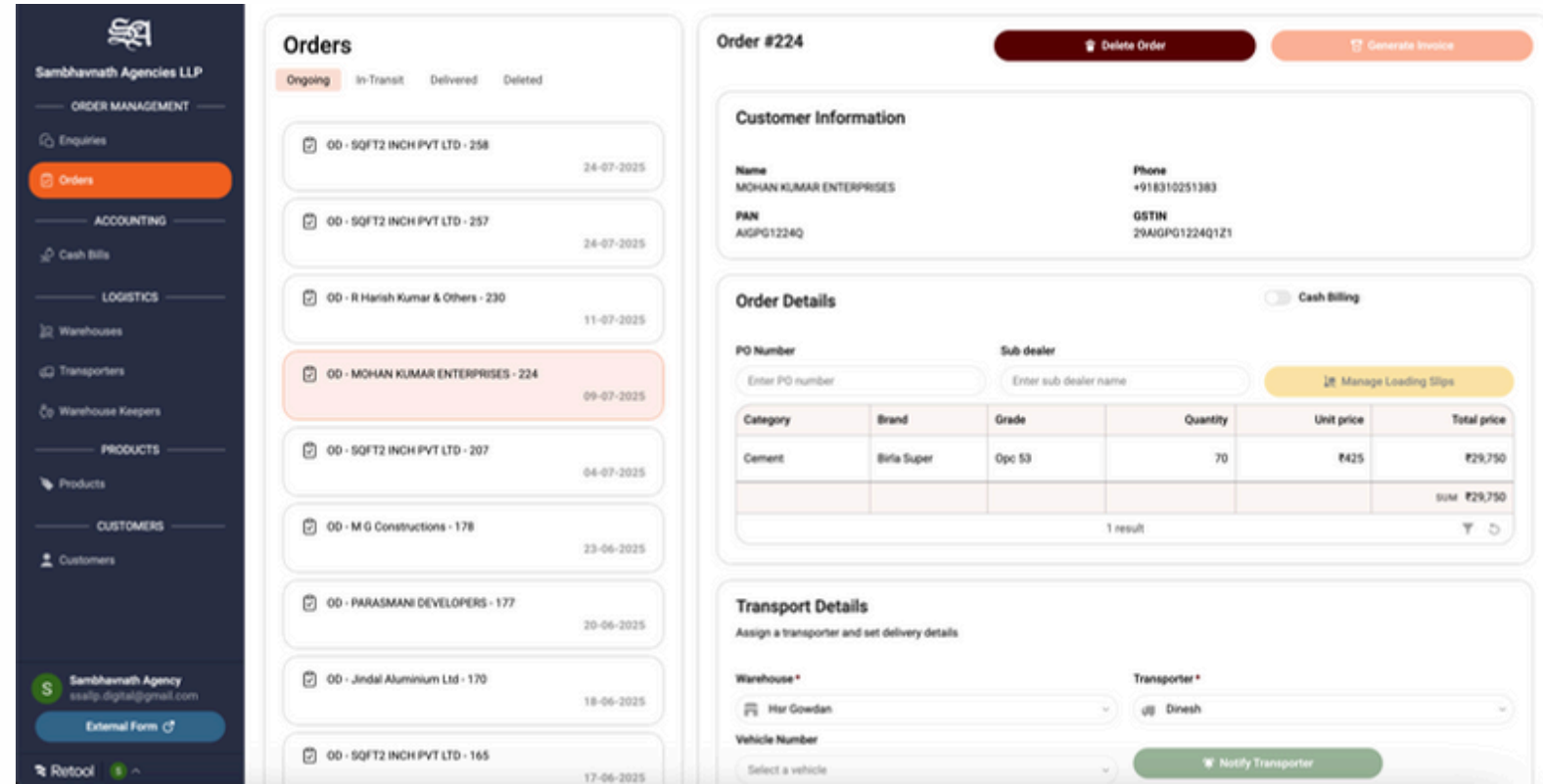
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YOUR AI AUTOMATION PARTNER

GET IN TOUCH

ORDER MANAGEMENT APP



Solution Summary: Using Retool and AI Sensy (WhatsApp API), Zoho Books API we developed a custom order management system tailored to their process. The digital infrastructure now handles enquiries, orders, and dispatch management seamlessly, with real-time notifications for each stakeholder.

Future Scope

The groundwork is set for scalable digital transformation, with potential enhancements such as:

- **Data-Driven Insights:** Adding analytics dashboards for tracking operational efficiency and delivery metrics.
- **Module Development:** Creating an app for transporters and warehouse keepers to streamline updates on the go.
- **AI Recommendations:** Implementing AI for demand forecasting and optimising order timelines.

CASE STUDY 3: ORDER AND DISPATCH MANAGEMENT APP FOR A BUILDING MATERIAL SUPPLIER

Objective: Digitize and streamline the order, enquiry, and dispatch management process. Automate the invoice generation for orders.

Client Context: The client managed their orders and enquiries through a manual system with some Excel tracking, leading to inefficiencies and difficulty in managing stakeholders' needs. They needed an end-to-end digital solution for smoother operations.

Challenges

- Managing multiple stakeholders (transporters, warehouse staff).
- Tracking orders accurately to avoid delays.
- Lack of real-time updates for orders and dispatches.

Solutions Delivered:

Workflow Automation

Database Architecture & Management

CRUD Functionality

Digital Tool Setup

Process Optimization

Custom UI/UX Design

API Integration

BOOK A DEMO

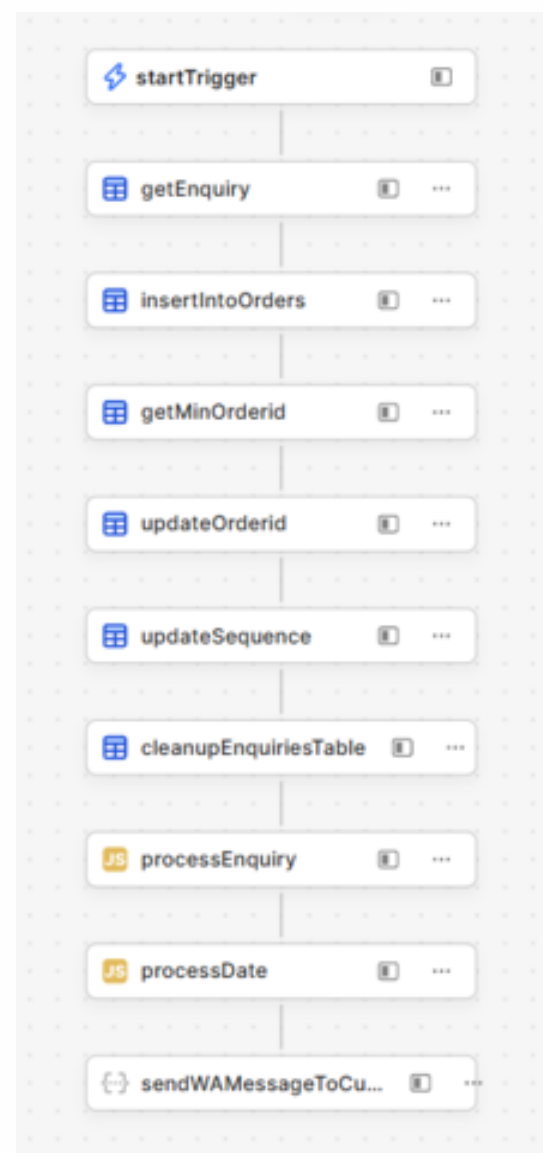
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PRODUCT CRUD INTERFACE

Product Name	Category	Brand	Grade	Unit	SKU	HSN/SAC	GST Rate	MRP	In active	Action
Ultratech-Other cement Cement	Cement	Ultratech	Other	50kg	CEM-U-OTHER CEMENT	252329	18%	0	✓	Edit
ACC-Concrete-Cement	Cement	Acc	Concrete	50kg	CEM-ACC-CONCRETE	252329	28%	0	✓	Edit
ACC-PPC-Cement	Cement	Acc	PPC	50kg	CEM-ACC-PPC	252329	28%	0	✓	Edit
Dalmia-DSP-Cement	Cement	Dalmia	DSP	50kg	CEM-DAL-DSP	252329	28%	0	✓	Edit
Dalmia-PPC-Cement	Cement	Dalmia	PPC	50kg	CEM-DAL-PPC	252329	28%	0	✓	Edit
Ramco-Supercrete-Cement	Cement	Ramco	Supercrete	50kg	CEM-RAM-SUPERCRETE	252329	28%	0	✓	Edit
Ultratech-PPC-Cement	Cement	Ultratech	PPC	50kg	CEM-U-PPC	252329	28%	0	✓	Edit
Zuari-PPC-Cement	Cement	Zuari	Ppc	50kg	CEM-ZUA-PPC	252329	28%	0	✓	Edit
ACC-Opc 43-Cement	Cement	Acc	Opc 43	50kg	CEM-ACC-OPC 43	252329	28%	0	✓	Edit
ACC-Opc 53-Cement	Cement	Acc	Opc 53	50kg	CEM-ACC-OPC 53	252329	28%	0	✓	Edit
Birla-Shakti-Concrete-Cement	Cement	Birla Shakti	Concrete	50kg	CEM-BSH-CONCRETE	252329	28%	0	✓	Edit
Dalmia-Opc 43-Cement	Cement	Dalmia	Opc 43	50kg	CEM-DAL-OPC 43	252329	28%	0	✓	Edit

Workflows



Tech Stack



- Platform: Retool
- Integrations: AI Sensy (WhatsApp API) for notifications, Fluent Form for receiving external enquiries, Zoho Books API for automated generation of order invoices.

Results

- 40% time savings by automating manual tasks.
- Improved communication with all stakeholders, reducing delays.
- Full visibility into each stage of the order and dispatch process.

Effort Behind the Scenes

This wasn't just about building software—it was about truly understanding the business.

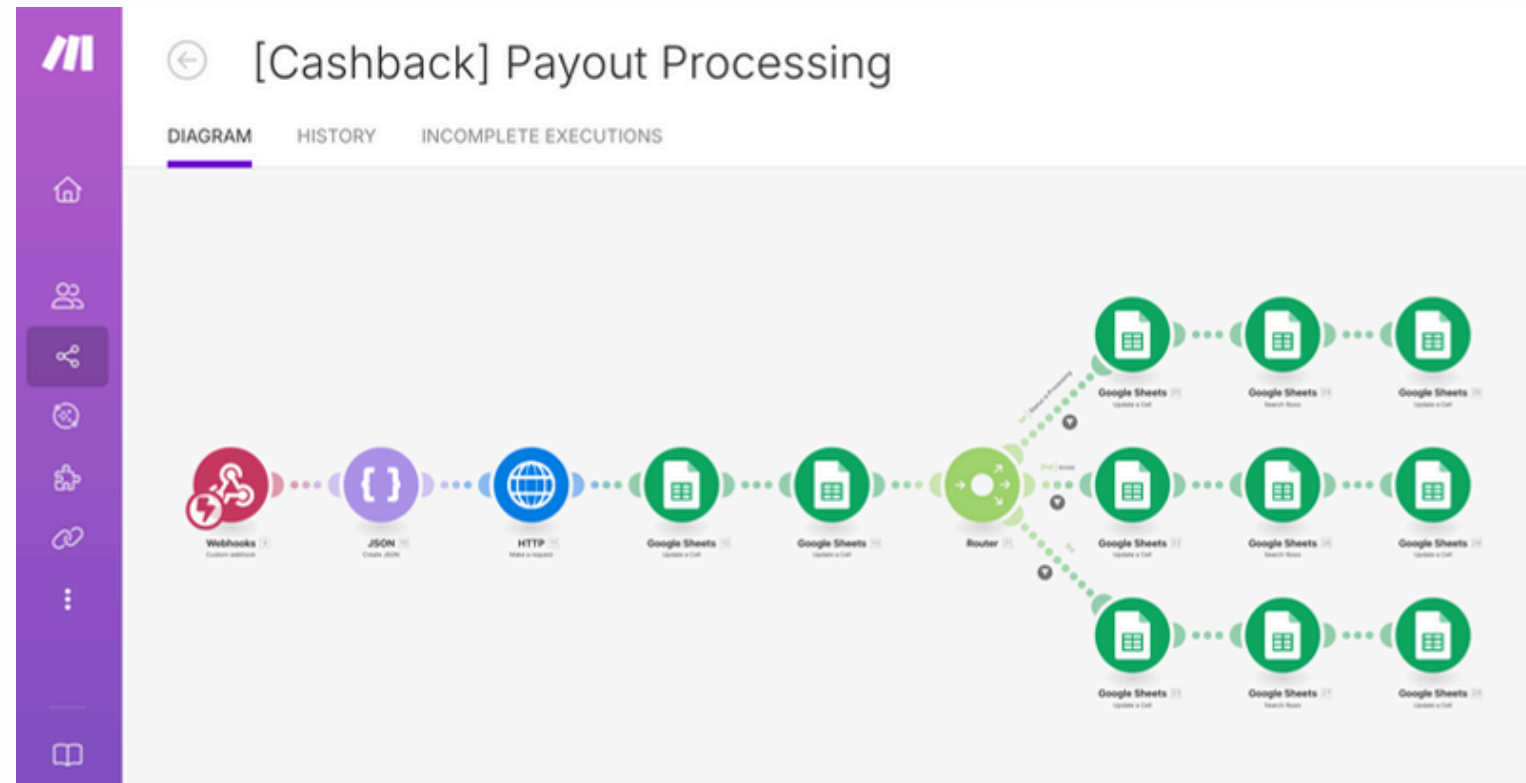
- **On-Site Visits:** We spent time at the factory, observing every stage of the production live in action.
- **Team Interactions:** Held multiple rounds of discussions with team members across departments to map out processes and pain points.
- **Deep Immersion:** Got hands-on with their daily challenges to ensure the solution wasn't just functional but transformational.

BOOK A DEMO

2025



PAYOUT WORKFLOW



Solution Summary: A lightweight yet powerful campaign infrastructure was built:

- QR-based cashback system deployed in packaging.
- Mobile-first forms for data capture.
- Automated payout system linked with UPI platforms.
- Backend database to manage and analyze customer data.

Future Scope

The cashback system is being expanded across more product lines. Upcoming plans include:

- Tiered cashback for premium SKUs
- Referral system for electricians to onboard peers
- Auto-campaigns based on customer location and frequency of purchase
- Plug-in loyalty dashboard for distributors to track effectiveness

CASE STUDY 4: BUILDING CUSTOMER LOYALTY WITH AN AUTOMATED CASHBACK SYSTEM (REWARDS)

Objective: Establish a direct connection with end users to build loyalty, gather insights, and increase demand.

Client Context: The client managed their orders and enquiries through a manual system with some Excel tracking, leading to inefficiencies and difficulty in managing stakeholders' needs. They needed an end-to-end digital solution for smoother operations.

Challenges

- No Direct Relationship with End Users: All transactions happened via distributors, cutting the manufacturer off from valuable end-user insights.
- Missed Marketing Opportunities: Without customer data, it was impossible to segment, target, or retain actual users.
- Low Brand Stickiness: End users often defaulted to distributor preferences, limiting brand loyalty.

Solutions Delivered:

Workflow Automation API INTEGRATION

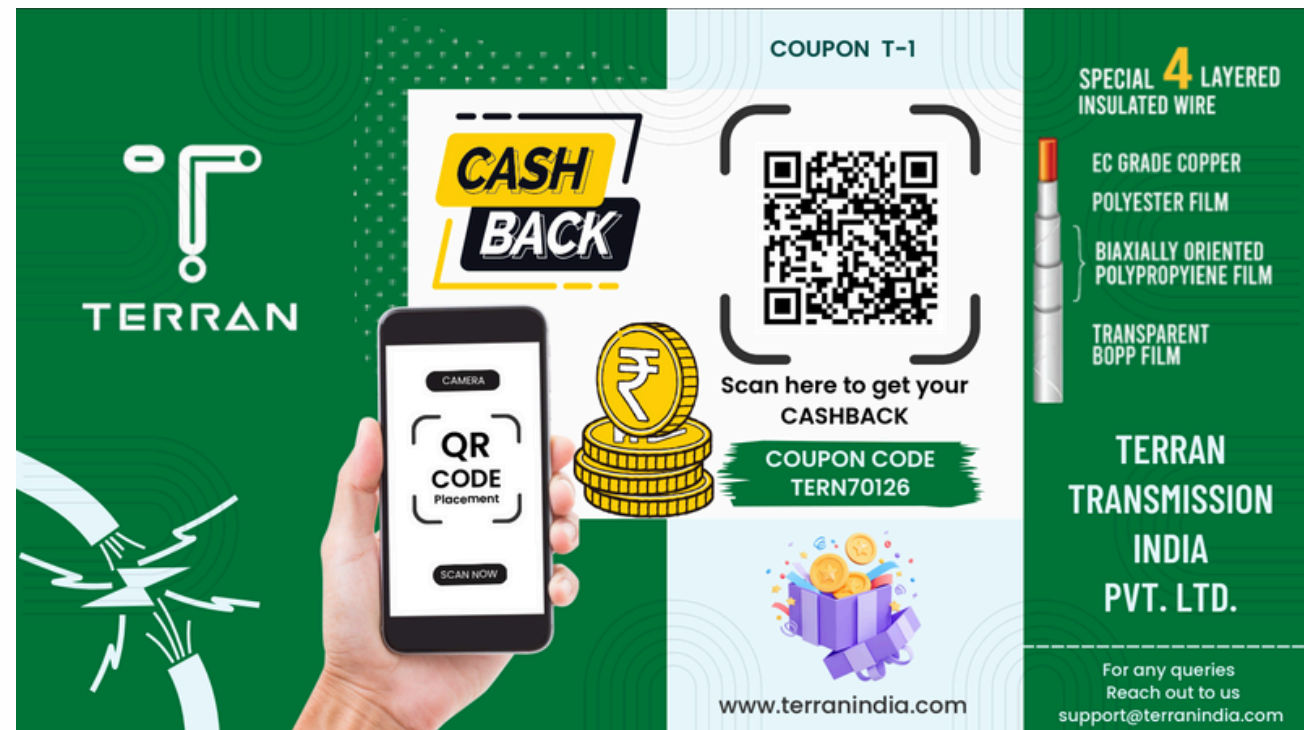
CUSTOM FORM DEVELOPMENT Digital Infrastructure Setup

BOOK A DEMO

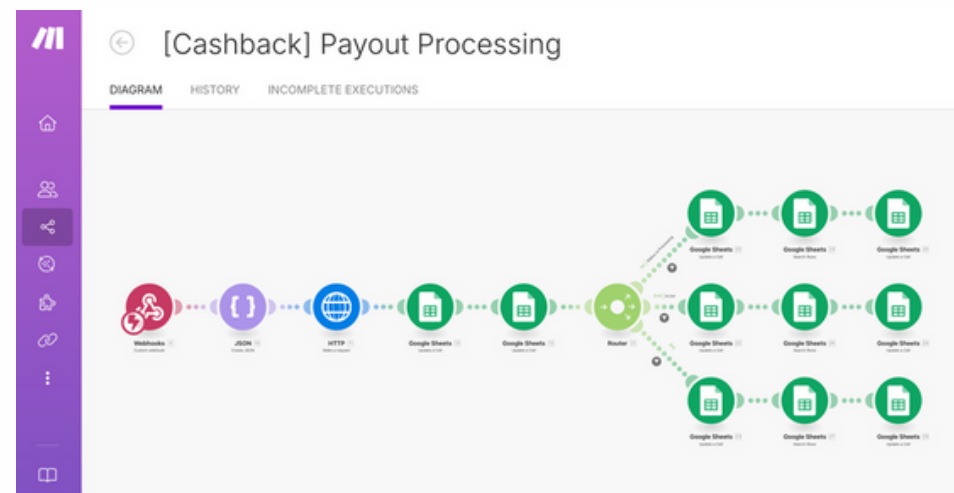
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COUPON CARD



Workflows

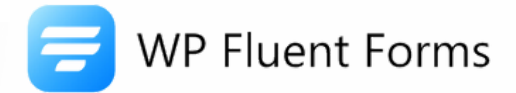


Effort Behind the Scenes

This wasn't just about building software - it was about truly understanding the business. When you hire us, it's not just about coding - we become your partner in reimagining how your business runs.

- We understood their target customer and built the form in multiple local languages and made the ul super simple.
- We aligned with the expectation of the cashback processing and ensured full visibility into the build and data.

Tech Stack



- **Platform:** Make.com
- **Integrations:** Cloudflare Workers, Razopay X Payout APIs, Google Sheets & Fluent Form, Postman for API testing.

Results

- Improved Customer Loyalty and increase in slaes by 5 to 10 %
- Engagaement with new customers - led to promoting brand identity.



BOOK A DEMO

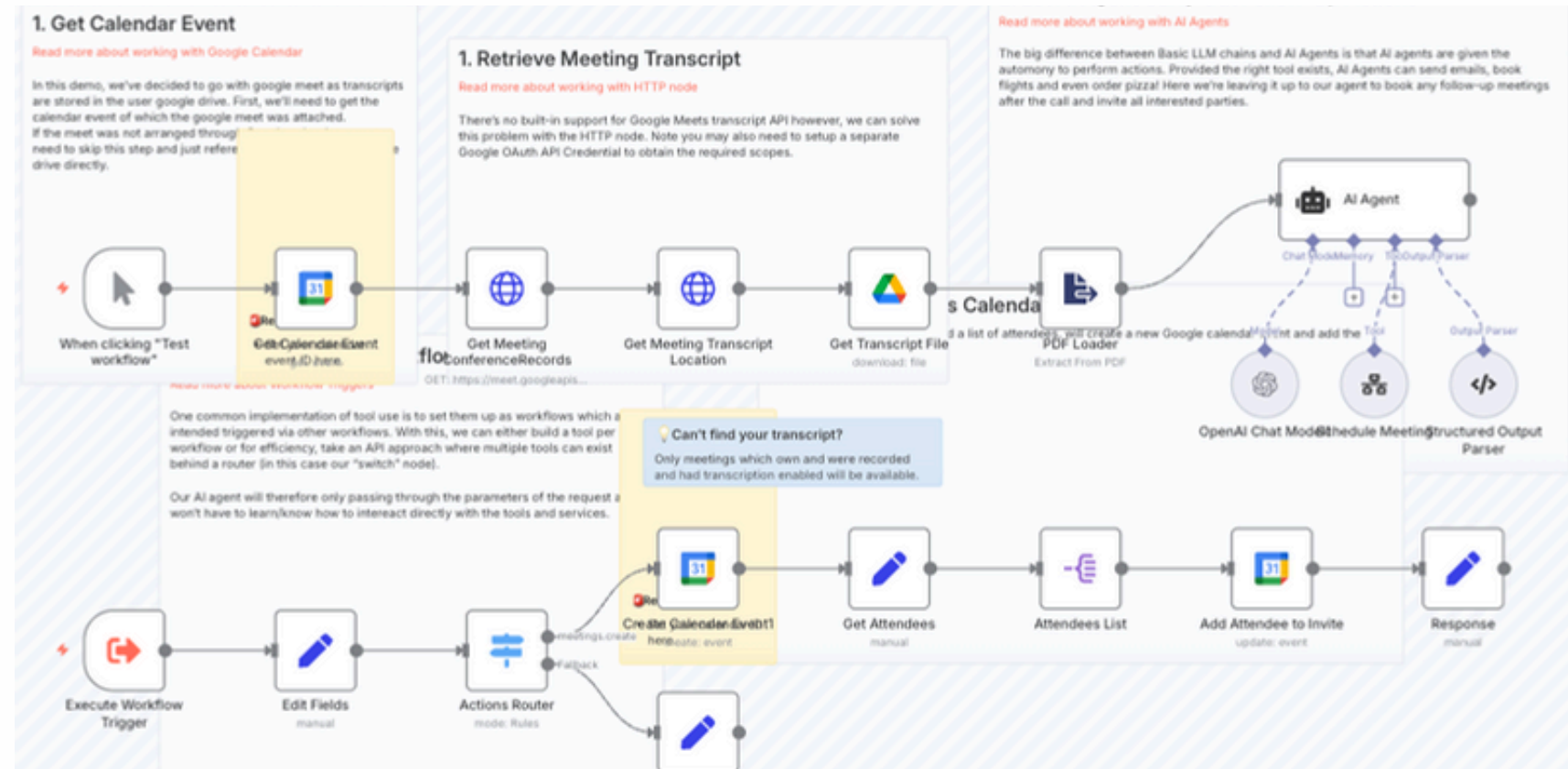
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YOUR AI AUTOMATION PARTNER

GET IN TOUCH

MEETING NOTES BASED NOTIFICATION & FOLLOW-UP TASKS



Solution Summary:

- **Unified Trigger System:** Captured leads from web forms, cold email replies, and scraped DM responses via webhook and IMAP triggers.
- **Lead Enrichment:** Apollo, Clearbit, BuiltWith, and LinkedIn scraping via Apify.
- **AI Qualification:** GPT prompt matched lead to ICP and predicted objections.
- **CRM Auto-update:** Synced to Attio with tagged fields and status.
- **Task Creation:** Follow-up tasks in Notion based on lead value.
- **Automated Follow-up Email:** Personalised, dynamic copy sent via Gmail API.
- **Meeting Scheduling:** Integrated Cal.com booking with confirmation tracking.
- **Call Summary Logging:** Synced Fireflies call summary to CRM and Slack.

CASE STUDY 5: FULL-FUNNEL B2B LEAD ENRICHMENT & SALES AUTOMATION SYSTEM

Objective: Streamline and automate the entire inbound lead management and qualification process - from lead capture to CRM enrichment, intelligent scoring, follow-up, meeting scheduling, and internal task assignment.

Client Context: The client received leads from multiple fragmented sources (website forms, cold outreach replies, social DMs and the sales team manually handled follow-ups, qualification, and CRM entry - leading to delays, inconsistent lead scoring, and missed conversion opportunities.

Challenges

- Manual entry and context switching across tools
- No unified lead qualification system
- Missed follow-ups and delayed meeting scheduling
- Lack of real-time visibility into lead pipeline health
- Fragmented task assignment and CRM hygiene

Solutions Delivered:

Workflow Automation

Task Management System

CRM Automation

Stakeholder Notifications

Lead Management

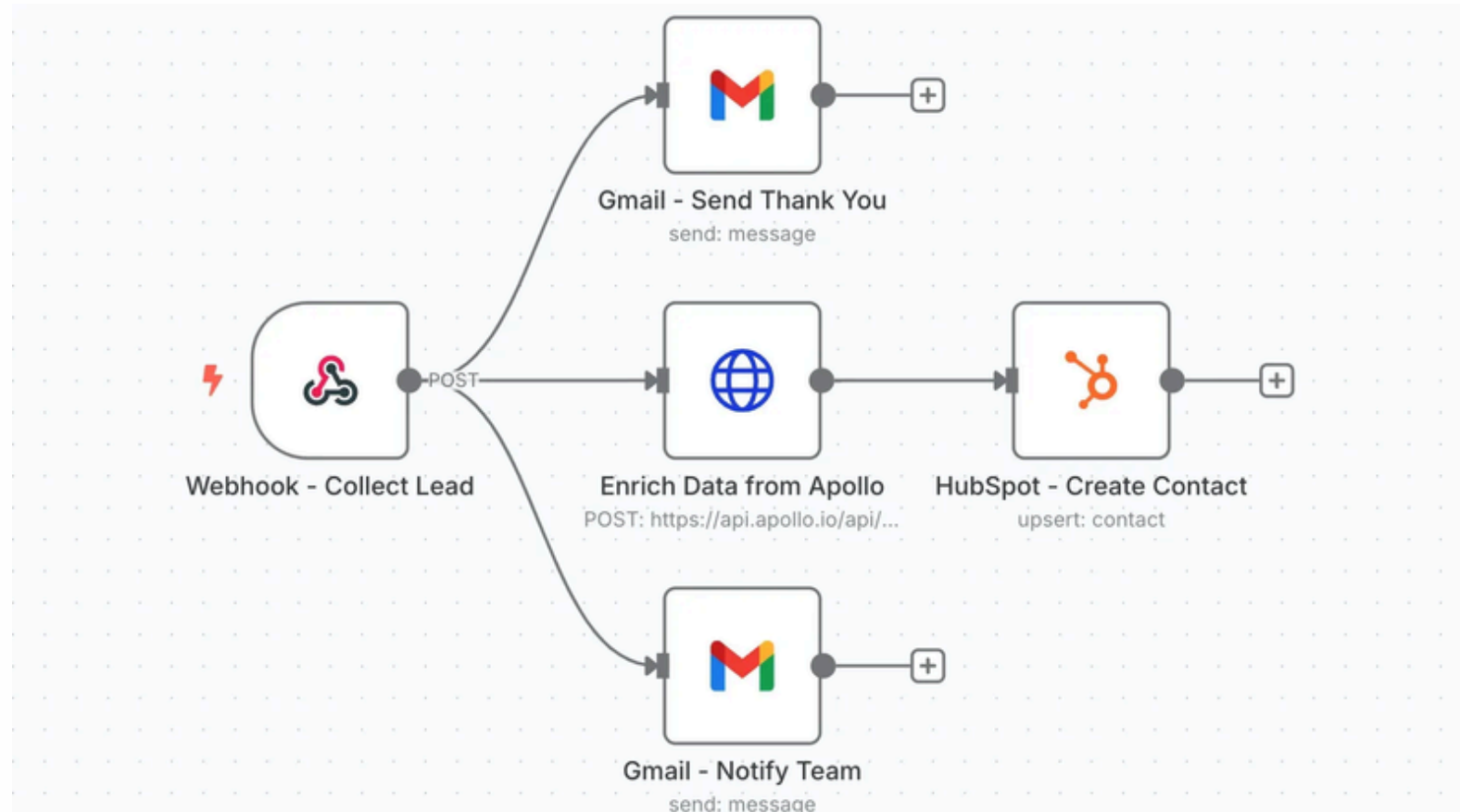
AI Agent

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LEAD QUALIFICATION - CRM UPDATION



Results

- 90% Reduction in Manual CRM Entry
- Avg. response time < 3 mins
- AI-matched ICP scoring improved sales conversion rate by 3.4x
- 40% more qualified calls booked
- Closed-loop sync between sales, CRM, email & meeting tools

Tech Stack



- **Platform:** n8n
- **Integrations:** AI Enrichment: Apify BuiltWith, GPT-4; Communication: Gmail API / Slack CRM: Hubspot, Fireflies.ai; Scheduling: Cal.com API; Task Management: Notion.

Future Scope

The current setup has brought structure to their operations, but the journey doesn't stop here:

- Add AI-generated proposals based on lead industry and historical wins
- Auto-classify churned vs. converted leads using CRM tagging logic
- Auto-reconnect drip workflows for leads that ghost after 7 days



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PROJECT MANAGEMENT WORKFLOW



Solution Summary: After analyzing their workflow, we developed a project management setup based on Google Sheets, ensuring low operational costs while meeting their functionality needs:

- **Lead Inquiry System:** Created a lead inquiry form using Fillout, which integrated directly with Google Sheets to automatically populate project data.
- **Task Tracking & Project Updates:** Individual task sheets were designed for each team member, syncing automatically with an admin dashboard to update project statuses in real time.
- **Backend:** Integrated Make.com for backend workflow automation, supported by Google App Scripts and Cloudflare Workers to reduce operation costs and handle more complex processes.
- **Centralized Project Dashboard:** The admin dashboard provided a clear view of project data, deliverables, client information, and task completion across the team.

CASE STUDY 6: PROJECT MANAGEMENT SYSTEM FOR A PHOTO STUDIO

Objective: To create a streamlined, cost-effective project management system that manages leads, tasks, and client communications efficiently for a small team with budget constraints.

Client Context: A photo studio focused on eCommerce product photography and videography, handling all lead inquiries, project deliverables, and team tasks manually. With a small team of five and no existing digital system, the studio required a lightweight, affordable solution that could centralize operations.

Challenges

- **Manual Operations:** The entire order and task management process relied on offline methods or memory, leading to inefficiencies.
- **Budget Limitations:** As a small, early-stage team, the client couldn't invest in high-cost project management software.
- **Complex Requirements:** Despite the team's size, they needed robust task tracking, real-time updates, and client notifications.

Solutions Delivered:

Workflow Automation

Task Management System

Custom Form

API Integration

Lead Management

Code Scripts

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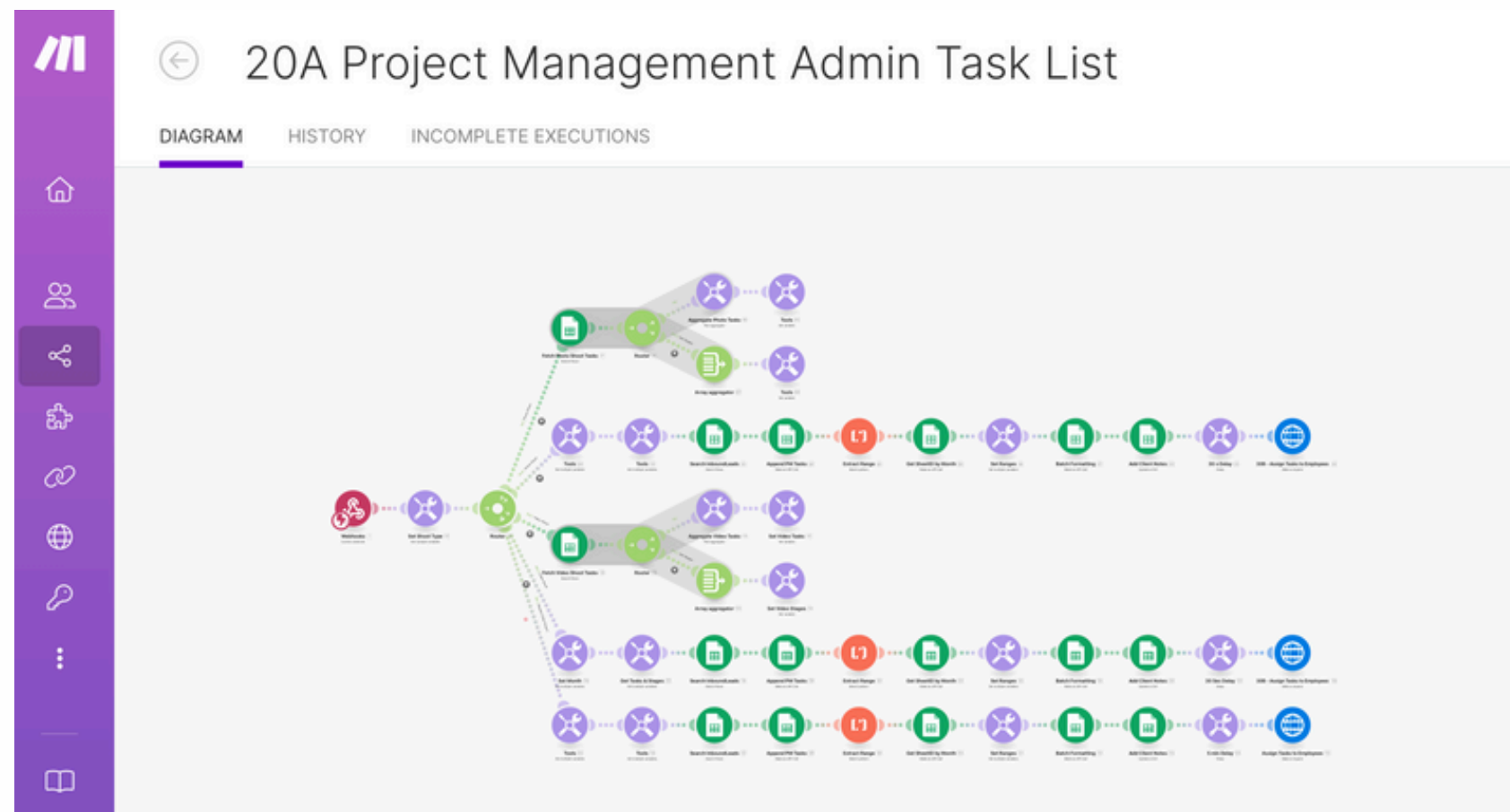
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TASK MANAGEMENT

Task ID	Stages	Tasks	Assignee 1	Assignee 2
1	Onboarding	MOU & Contract	Alan	Vikram
2		Proforma Invoice	Alan	Vikram
3		Advance	Alan	Vikram
4		Shoot date Confirmation	Alan	Vikram
5		Receive Products	Alan	Vikram
6		Product List	Alan	Vikram
7		Finalizing Deliverable Specifications: Size, Format, etc	Alan	Vikram
8	Pre-Production	Shot lists	Rosaliya	
9		1st Moodboard	Rosaliya	
10		Approvals	Rosaliya	Vikram
11		Final moodboard	Rosaliya	
12		Prop List	Rosaliya	
13		Lighting References and List	Rosaliya	
14		Model & Makeup Requirements	Rosaliya	
15		Location Requirements	Rosaliya	
16		Prop Sourcing	Rosaliya	
17		Shoot day Schedule	Rosaliya	
18	Production	Equipment Prep	Vikram	
19		Shotlists for Edits	Alan	Vikram
20		Pack up	Vikram	
21		Card Backups	Naveen	
22		Files Shortlisting and Selection	Vikram	Rosaliya
23		Edit & Retouch	Naveen	

Workflows



Tech Stack



- **Platform:** [Make.com](https://www.make.com)
- **Integrations:** Fillout - Lead inquiry form integration with Google Sheets. Google Sheets - Core project and task management infrastructure. Google App Scripts & Cloudflare Workers - Managed heavier tasks to minimise Make.com usage and reduce costs.

Future Scope

The current setup has brought structure to their operations, but the journey doesn't stop here:

Scaling Infrastructure: Transition to SmartSuite or Retool for greater scalability as the business grows.

AI-Enhanced Workflows: Automate more repetitive tasks and utilize AI to predict project delivery timelines.

Advanced Client Portal: Build a dedicated portal for clients to view project progress, approve deliverables, and make payments seamlessly.

Results

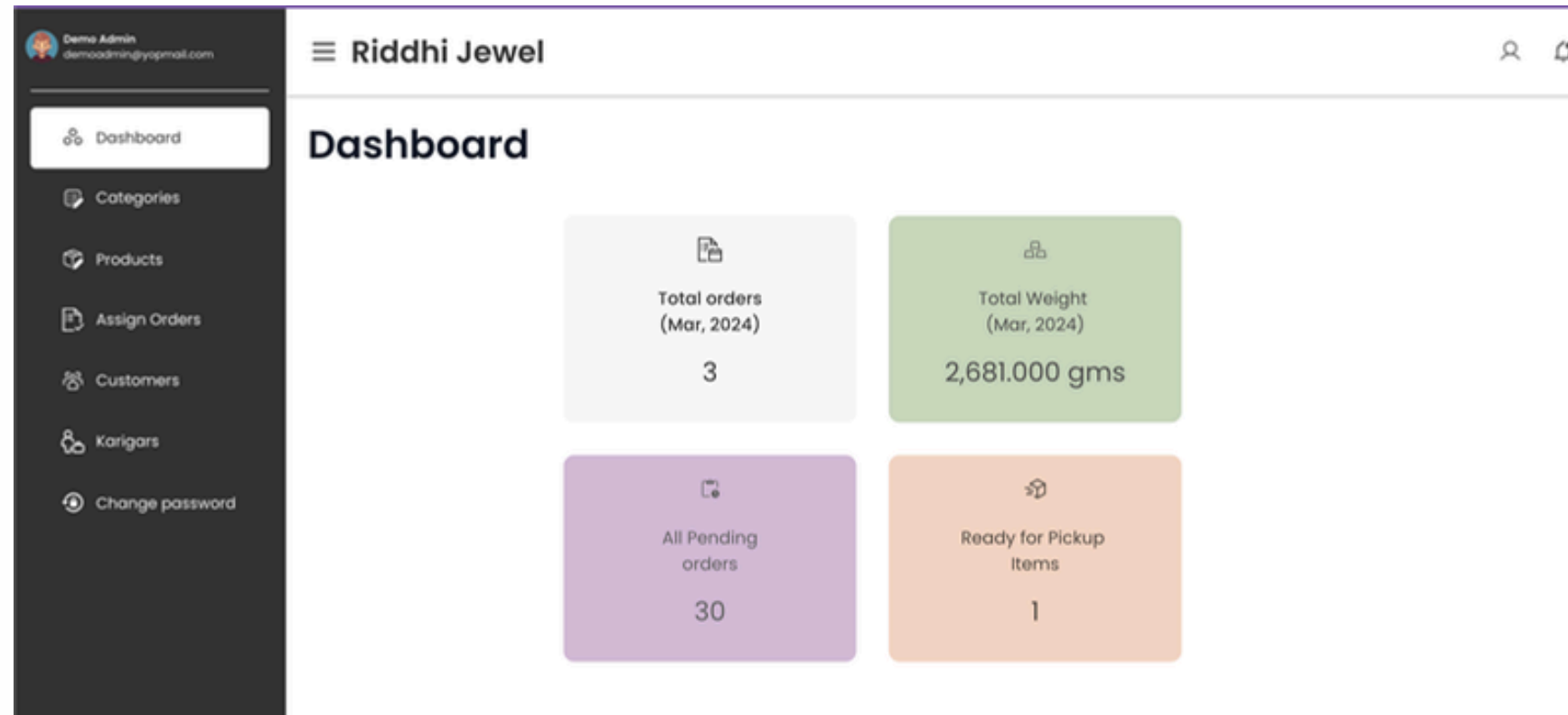
- 60% time savings by automating manual tasks.
- Improved communication with all stakeholders, reducing delays.
- Full visibility into each stage of the order and dispatch process.

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ORDER MANAGEMENT APP



Solution Summary: Our team built an order management system on Bubble.io, integrated with the WhatsApp API for automated updates. We included inventory management tools, streamlined order tracking, and simplified communication channels for both clients and backend staff.

Future Scope

This project lays the foundation for continuous improvements, including:

- **AI-Powered Insights:** Integrating predictive analytics for demand forecasting and restocking schedules.
- **Supplier Integration:** Automating order placement with suppliers for low-stock items.
- **Client Portal:** Building a self-service portal for clients to track their orders and place repeat orders seamlessly.
- **Omni-Channel Integration:** Syncing order management with online sales platforms for a unified sales and inventory system.

CASE STUDY 7: CATALOGUE AND PROCESS MANAGEMENT SYSTEM FOR DISTRIBUTOR

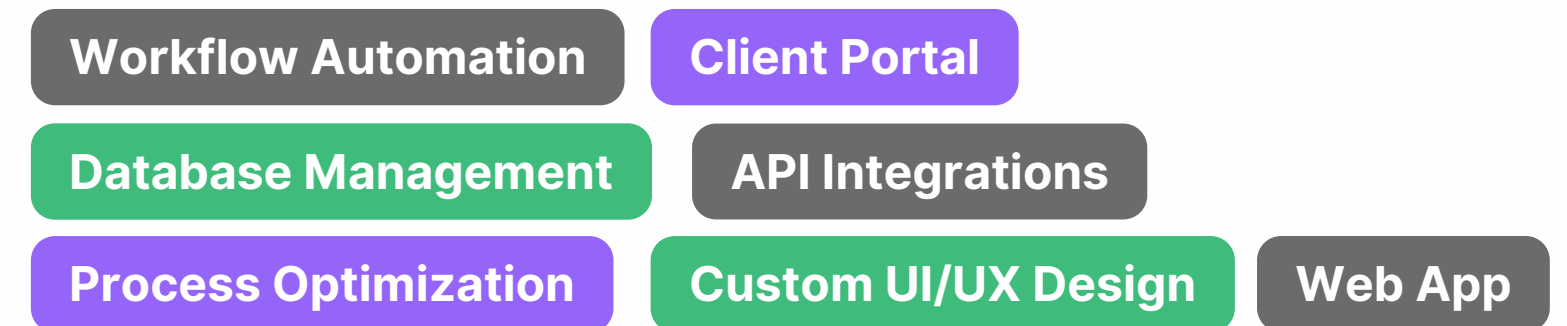
Objective: Digitize the order process, manage inventory, and streamline client communication.

Client Context: Previously, a wholesale jeweller struggled with manual order processing and customer updates, resulting in delays and miscommunications. Only approved users (retailers) needed access to the platform to streamline the ordering process and ensure accurate communication from order to delivery.

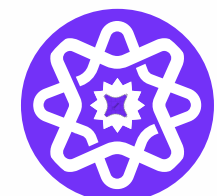
Challenges

- Ensuring secure access for approved users only.
- Managing and updating the catalog for an ever-changing inventory.
- Keeping clients updated in real time through WhatsApp notifications.

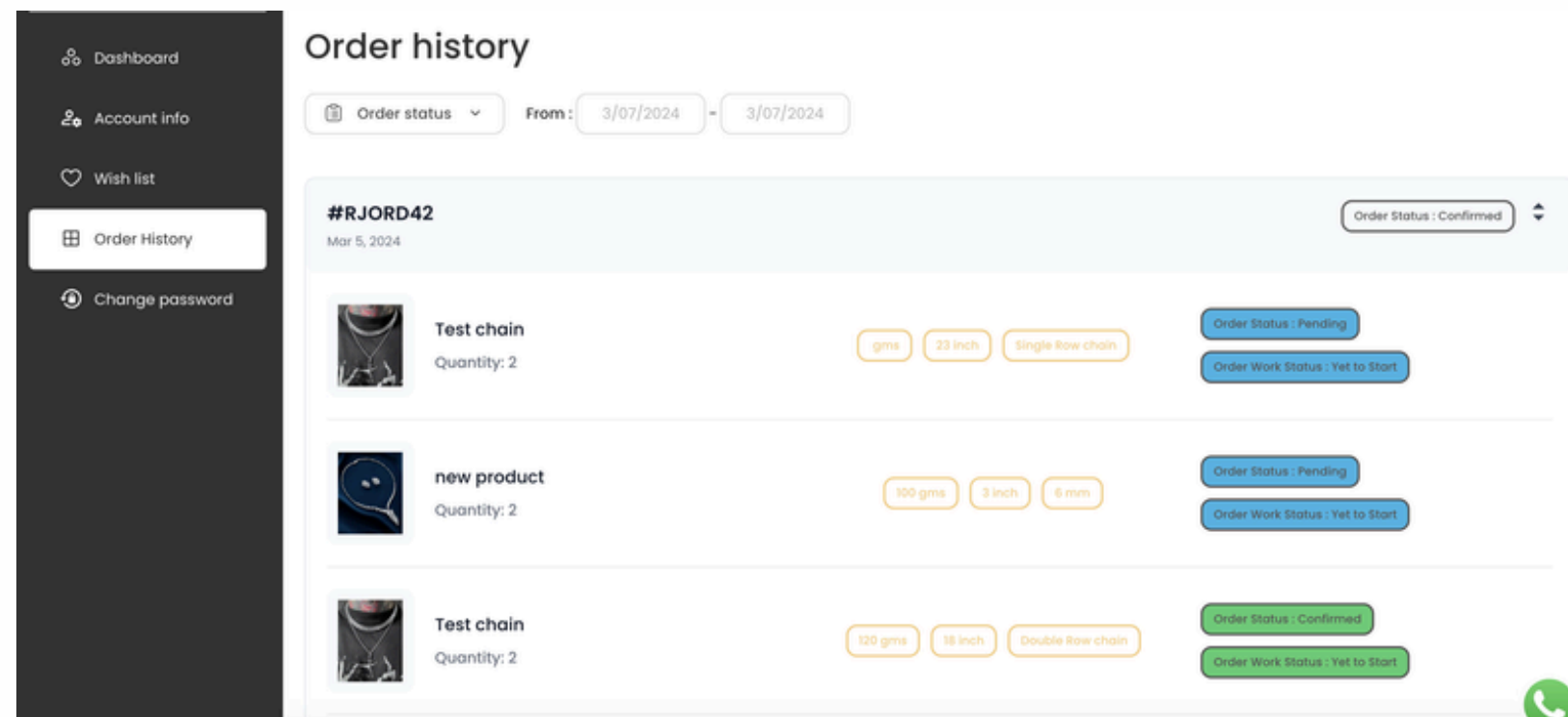
Solutions Delivered:

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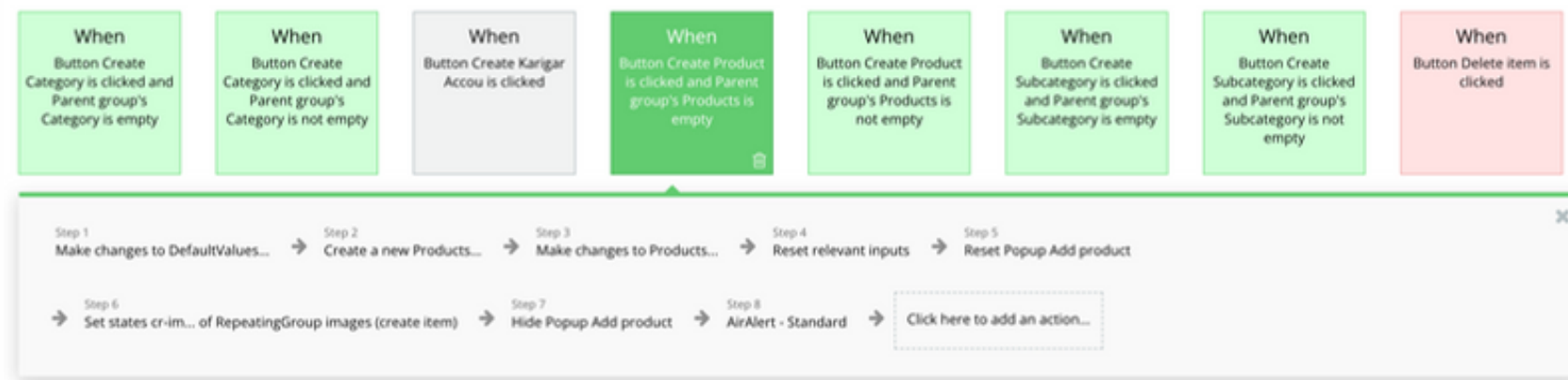
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CLIENT PORTAL



Workflows



Effort Behind the Scenes

Our work went far beyond sitting at our desks:

- **On-Ground Research:** We visited their showroom, warehouses, and back-office operations to observe how things worked in real-time.
- **Complete Process Understanding:** Conducted in-depth interviews with team members across departments to ensure every stakeholder's needs were addressed.



BOOK A DEMO

Tech Stack

bubble

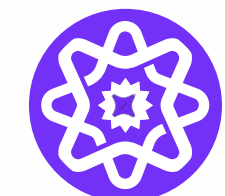


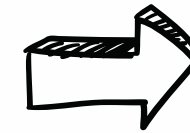
Elastic Email

- **Platform:** Bubble.io
- **Integrations:** WhatsApp API and elastic email API for real-time notifications, automated order processing, Postman for API testing.

Results

- 30% faster order processing with direct client communication.
- 50% decrease in client inquiries due to regular updates.
- Efficient inventory tracking with an updated catalog of designs.

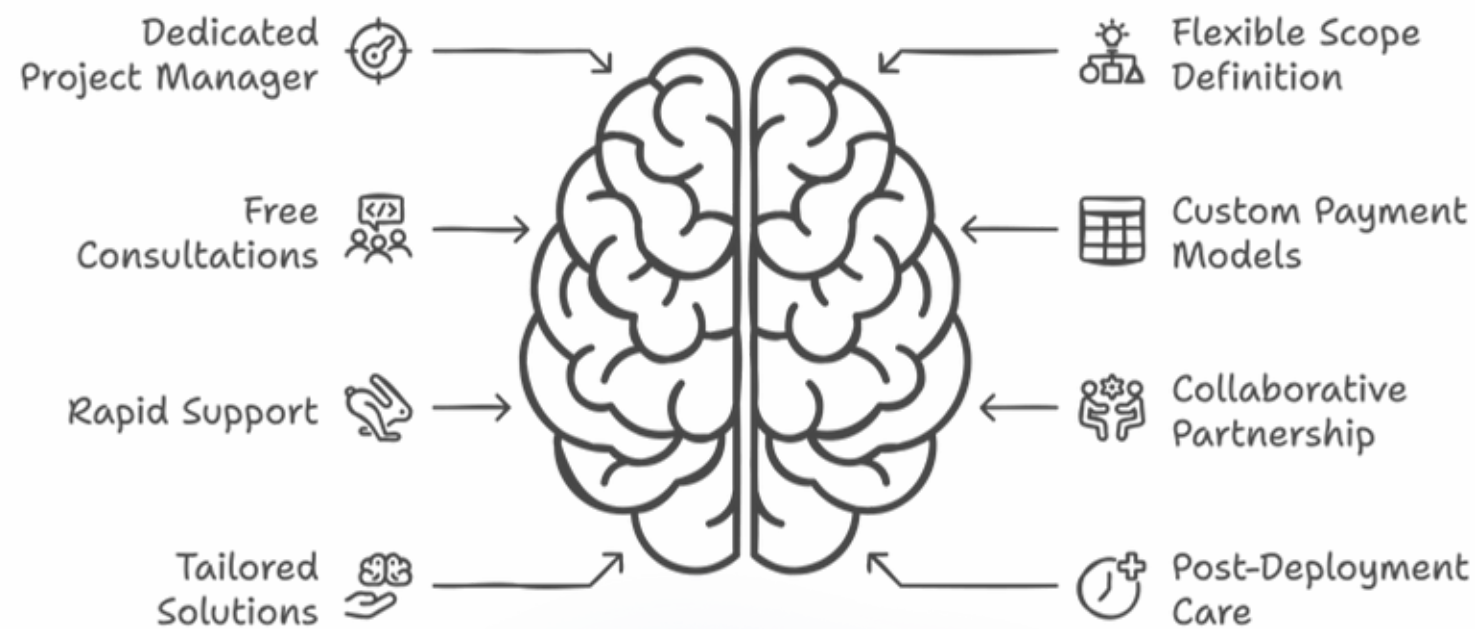




OUR AUTOMATED WORKFLOWS DO ALL THE HEAVYLIFTING

WHAT IT'S LIKE TO WORK WITH US

Comprehensive Client Services Overview



We're here to brainstorm, adapt, and grow with your needs.

[Start Now ->](#)

What We Offer: **Simplified**

- **Consulting & Strategy:** Expert guidance to choose the right tools and systems.
- **Tailored Solution:** Tailored system, workflows & agents built to match your unique needs and business process.
- **Migration & Modernisation:** Seamlessly upgrade and optimise your tech.
- **Post-Deployment Support:** Continuous improvement, even after go-live.
- **Scalable Solutions:** From small workflows to enterprise systems, we've got you covered.
- **AI-Powered Integrations:** Smarter workflows with AI at the core.

Core Values

- **Client First:** We put our clients at the heart of everything we do, tailoring our approach to their unique needs and industry challenges.
- **Innovation Always:** We embrace creativity and curiosity, constantly exploring new ways to solve problems and deliver meaningful impact.
- **Unwavering Integrity:** We believe in transparency, honesty, and building trust through every interaction and commitment.
- **Reliability Matters:** Our team is dependable, and our work is robust, designed to stand the test of time with unwavering support.
- **Impact-Focused:** We strive for results that matter, empowering our clients to grow, succeed, and reach their full potential.



OUR APPROACH



Discovery & Planning:

We begin by understanding each client's unique requirements, mapping out the pain points and objectives.



Customization:

Every solution is customized to the client's workflow and industry needs.



Implementation:

We lead the project with minimal disruption to your operations, ensuring a smooth transition.



Ongoing Support:

Our team provides long-term support and monitors system performance for continued success.



Constant Improvement and Check - Ins

We think ahead for you all while you put in the work to scale your business. We ensure your systems upgrade as your customers expand.



No matter what stack you use - or how chaotic your process is - we'll bring the strategy and systems to streamline, scale, and integrate your business across functions!

Tech Partnerships & Integration Expertise

Official Partnerships & Accreditations

1. SmartSuite Bronze Partner 2024 - Empowering clients with next-gen project and workflow management systems.
2. Retool Agency Partner - Building powerful internal tools and dashboards with deep backend logic and integrations.
3. n8n Certified - Delivering advanced self-hosted automation at scale with full flexibility and control.
4. Bubble.io Builder - Crafting custom no-code web apps and platforms tailored to your process.
5. Make (Integromat) Experts - Seamlessly automating tools across your tech stack.
6. Airtable App Builders - Creating dynamic data-driven systems for inventory, operations, and CRM workflows.

Cross-Platform Integration Experience

Our team has implemented solutions across dozens of industry-standard platforms:

Project Management: Monday.com, ClickUp, Trello, Asana, SmartSuite

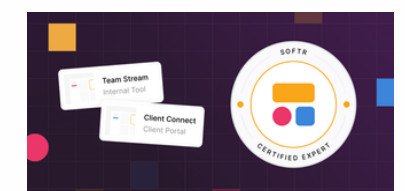
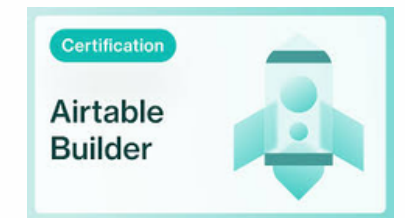
Communication & Alerts: Slack, Telegram, WhatsApp, Instagram

CRM & Sales: HubSpot, Attio, Zoho CRM, Pipedrive

Finance & Accounting: Zoho Books, Xero, QuickBooks, Razorpay, Stripe

ERP / Enterprise Tools: SAP, Tally, Zoho, custom legacy systems

Custom Bots & Interfaces: Slack bots, WhatsApp bots, internal UIs via Retool/Bubble.



CERTIFIED DEVELOPERS
Our team holds top-tier certifications across leading no-code tools, including enterprise-level API integration expertise.

2025



YOUR AI AUTOMATION PARTNER

GET IN TOUCH

In OPERATIONS SINCE JANUARY 2023

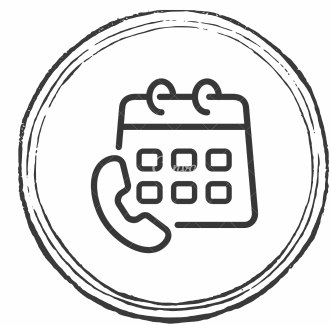
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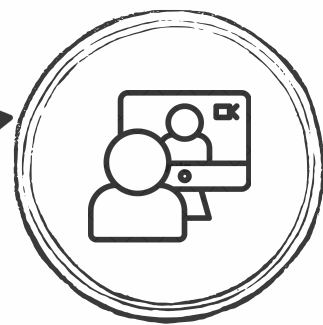
 www.smallbaydigital.com

Still Have Questions?
Got more queries or need clarity on how we can help your business?

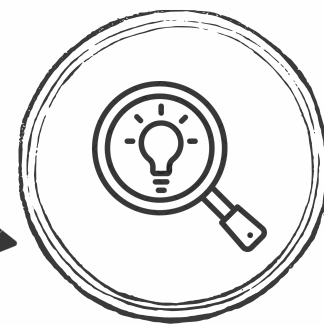
[Read FAQs ->](#)



Schedule Your Free 1:1 Call



Audit Porcesses & Evaluate Fit Assesment




Identify Bottlenecks & get Personalized Solution



Custom Quote in your Inbox with defined scope & timeline



Onboard & Build Systems to Scale Your Business

 **Let us bring clarity and efficiency to your creative chaos - schedule a 1:1 discovery call today!**

