

SBD X AIRTABLE

AIRTABLE CERTIFIED BUILDER

# Airtable for Your Business

A complete guide to understanding Airtable,  
real use cases, and how SBD builds it for you.

## BEFORE WE BEGIN

# Hey, glad you're here.

This is a walkthrough of what Airtable can do for your business, how it has been built for companies like yours, and whether it is the right fit for what you need right now.

**Common question: Who is this for?**

Business owners, ops leads, and team managers who have heard of Airtable but want to understand what it actually does, what it costs, and whether it solves the problems they face today. No technical background needed.

**60+**

Clients Served

**1,000+**

Workflows Automated

**3+**

Years in Operation

**What you will find inside**

- 03 About SBD and what we build
- 04 How every project works, from first call to live tool
- 05 What Airtable can do for your business
- 06 Airtable for every business type and department
- 07 When Airtable is NOT the right tool
- 08 Case Study: Kale Acquisition
- 09 Case Study: MK Globo Campaign Management
- 10 Case Study: Pongs India Quote Tool
- 11 Integrations: Airtable + 1000+ Integrations (Softr, Make, Slack, etc.)
- 12 Enterprise: governance, security, and scale
- 13 Quick readiness checklist
- 14 Our certifications and partners
- 15 Let's talk - here is what happens next

## ABOUT SBD

# The people you call when your spreadsheets stop making sense.

SBD is an AI automation studio based in India, building systems for growing businesses for over 3 years - serving teams in the US, Europe, Australia, Dubai, Singapore & India.

Most clients reach out when they are drowning in manual work and the last tool they tried did not stick. That is where structured, production-ready builds come in.



Airtable platform overview

**9+**

Airtable Builds & Projects

**100+**

Airtable Integrations

**5+**

Industries Served

## What gets built in Airtable

- CRMs and pipeline tools
- Inventory and stock management
- Order and dispatch management
- Client portals and project trackers
- Quote and proposal generators
- Operations dashboards
- Automated workflows
- Multi-department platforms

SBD holds certifications across **Airtable, Retool, SmartSuite, n8n, Make, Zapier, and Bubble.**



## HOW WE WORK

# From first call to live tool, here is exactly what happens.

Every build follows the same 6-phase process. You always know where things stand.

- 1 Discovery**  
Understanding the business, the team, the data, and the pain points. Every workflow and bottleneck gets mapped before anything is built.
- 2 Auditing**  
Reviewing existing tools, spreadsheets, and processes. Identifying what works, what does not, and where the biggest gains are.
- 3 Consultation and Solution Design**  
Recommending the right approach, the right stack, and the right scope. Interface mockups and schema designs are shared upfront.
- 4 Build and Review**  
The system gets built and tested internally first. You review a working version, give feedback in one round, and changes go in before launch.
- 5 Launch, Training and Handover**  
Loom walkthroughs for every feature. A live handover call. Full documentation so the team is confident from day one.
- 6 Ongoing Support and Next Builds**  
Post-launch support included. Most clients come back within 60 days with Phase 2 ideas. The next set of features gets planned together.



Typical project workflow from discovery to launch

It starts from **\$1,500 one-time cost** with ongoing support retainers. Free 30-minute strategy call before any commitment.

### Common question: What if there is already data in spreadsheets?

That is the most common starting point. Existing data gets migrated into Airtable as part of the build. No data gets left behind.



## THE PLATFORM

# What Airtable can do for your business.

Airtable is a database that looks simple enough for anyone to use but is powerful enough to run an entire operation. It connects data, people, and processes in one place.

## 8 ways to see the same data

View	What it does	Best for
Grid	Classic spreadsheet with grouping, sorting, filtering, color coding.	Operations
Kanban	Drag-and-drop cards by status. Move deals from Prospect to Won.	Pipelines
Calendar	Records on a calendar by date. Editorial calendars, deadlines.	Planning
Gallery	Visual cards with images and thumbnails. Product catalogs.	Browsing
Form	Shareable forms feeding directly into tables. Conditional logic.	Data collection
Timeline	Horizontal timeline. Work over time, capacity planning.	Scheduling
Gantt	Dependencies and milestones mapped visually.	Complex projects
List	Clean, simplified. Just the essentials without clutter.	Focused tasks

## Key capabilities

### Interfaces

Custom dashboards and data entry screens without code. Scoped per user.

### Forms

Collect structured data from anyone. Embed on site or share via link.

### Extensions

Chart builders, pivot tables, Gantt timelines, page designers for invoices.

### Automations

Auto-trigger Slack, email, record updates, invoice creation. 8 trigger types.

### Sync

Real-time data sync between bases or external sources like Jira and Salesforce.

### API and Webhooks

Connect Airtable to anything. Incoming and outgoing webhooks.

### **Common question: Can Airtable replace a current CRM or project management tool?**

In many cases, yes. Salesforce, HubSpot, Monday.com, Asana, and Trello setups have been replaced for teams that needed more flexibility.

WHO IT IS FOR

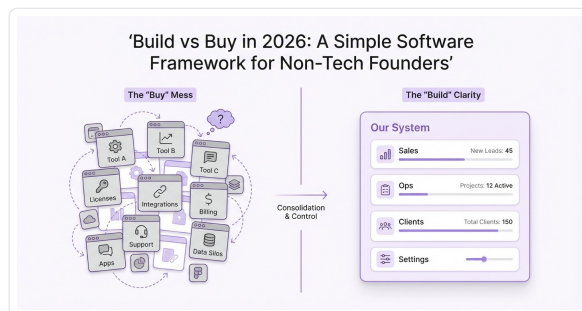
# Built for every team and every type of business.

Whether it is a 10-person team or a 500-person enterprise, Airtable scales to fit.

<b>SMBs</b> Teams of 5 to 200 replacing spreadsheets. Structure of enterprise software without the complexity.	<b>Enterprises</b> Multi-team coordination without monolithic ERP. Single source of truth. Up to 500K records.
<b>Agencies</b> Client tracking, retainer logs, content calendars, capacity planning. Softr for portals.	<b>Consulting</b> Engagement CRM, deliverables, knowledge base, proposal pipeline, billing.
<b>E-commerce</b> Product catalogs, orders, inventory, returns, campaigns. Shopify integration.	<b>SaaS / Tech</b> Feature backlogs, sprints, bugs, releases, customer feedback. One source of truth.

## Use cases by department

<b>Sales</b> <ul style="list-style-type: none"> <li>Lead pipeline</li> <li>Quote log</li> <li>Deal automation</li> <li>Win/loss reports</li> </ul>	<b>Marketing</b> <ul style="list-style-type: none"> <li>Campaign planning</li> <li>Content calendar</li> <li>Influencer CRM</li> <li>Launch checklists</li> </ul>	<b>Operations</b> <ul style="list-style-type: none"> <li>Process docs</li> <li>SOPs</li> <li>Vendor tracker</li> <li>Internal requests</li> </ul>	<b>Logistics</b> <ul style="list-style-type: none"> <li>Order dispatch</li> <li>Shipment status</li> <li>Returns flow</li> <li>Supplier times</li> </ul>
<b>HR</b> <ul style="list-style-type: none"> <li>Hiring pipeline</li> <li>Onboarding</li> <li>Leave tracking</li> <li>Performance</li> </ul>	<b>Finance</b> <ul style="list-style-type: none"> <li>Invoice tracker</li> <li>Expenses</li> <li>Budget vs actuals</li> <li>Renewal alerts</li> </ul>	<b>Support</b> <ul style="list-style-type: none"> <li>Tickets</li> <li>SLA tracking</li> <li>Feedback log</li> <li>Knowledge base</li> </ul>	<b>Product</b> <ul style="list-style-type: none"> <li>Feature backlog</li> <li>Sprint tracker</li> <li>Bug log</li> <li>API docs</li> </ul>



Build vs Buy in 2026 - A decision framework for non-tech founders

[Read More: Build vs Buy in 2026 →](#)

BEING HONEST

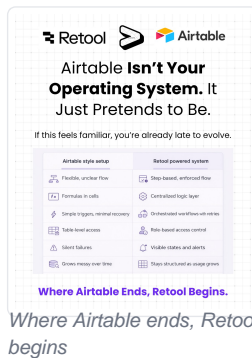
# When Airtable is not the right fit.

After 60+ projects, the pattern is clear. Here is when something else works better.

- 1 Row limits at scale**  
 Most plans cap at 50,000 rows (125K Business, 500K Enterprise). Large and fast-growing datasets may need a different database.
- 2 Pixel-perfect public UI**  
 Interface Builder works great internally. A public portal with full branding needs Softr or Retool on top.
- 3 High-volume real-time processing**  
 Thousands of records simultaneously with sub-second response will show strain.
- 4 Complex multi-step logic**  
 Deep conditional branching, retries, API orchestration - that is software territory. n8n or Retool handles it.
- 5 Strict regulatory compliance**  
 Specific data residency beyond Airtable Enterprise may need a custom solution.

**What happens instead**  
 SBD is a Retool Certified Builder. Custom internal tools with direct database connections. Full data migration handled.

*Common question: What happens to existing data if the business outgrows Airtable?*  
 Every build is architected with scale in mind. Moving to Retool or a custom database is a migration SBD handles.

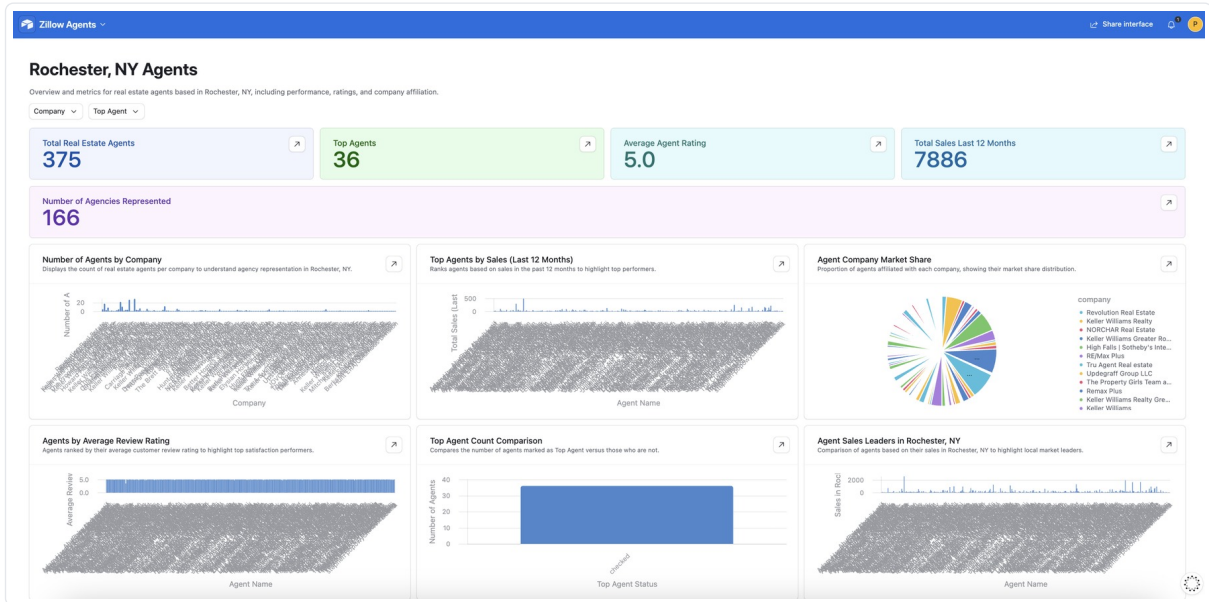


When Airtable Hits Its Ceiling →

## CASE STUDY 01

# Kale Acquisition

Real Estate Agent Scraper | Airtable Interface



Kale Acquisition - Agent tracking dashboard built in Airtable

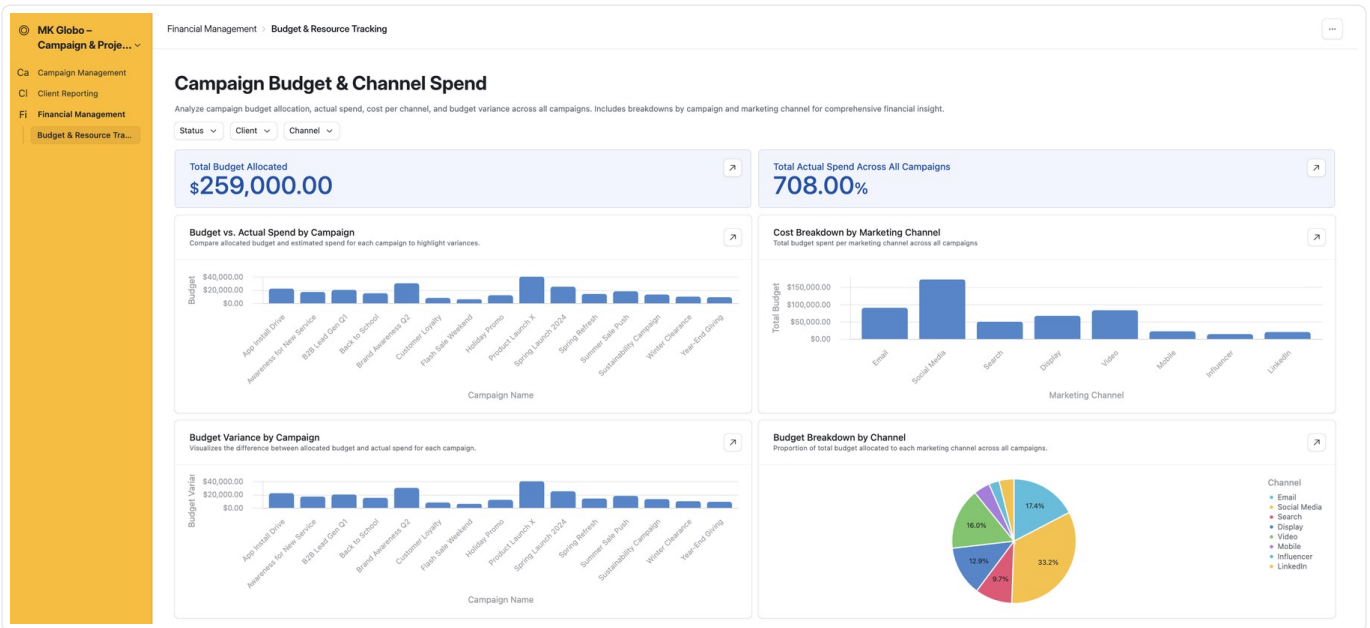
<h2>375</h2> <p>Agents Tracked</p>	<h2>36</h2> <p>Top Performers</p>	<h2>7,886</h2> <p>Sales (12 Months)</p>	<h2>166</h2> <p>Agencies</p>
------------------------------------	-----------------------------------	---	------------------------------

The challenge	What was built	The result
A US-based lead generation agency focused on the real estate market wanted to scrape the Zillow platform for a list of top real estate agents city-wise and use that data for their clients.	An n8n agent that scrapes Zillow data automatically and pushes it into Airtable. A full interface dashboard showing agent counts, top performers by sales volume, agency market share, and review ratings. Filters let the team drill into any segment.	375 agents tracked across 166 agencies. Top performers surface automatically. 12-month sales visible at a glance. Zero manual reporting.

## CASE STUDY 02

# MK Globo

Campaign and Project Management | Marketing Communications Agency

**Every campaign, task, and deadline in one system. Full visibility for leadership.**


MK Globo - Campaign management dashboard built in Airtable

## The challenge

Campaign deliverables tracked across spreadsheets, email threads, and WhatsApp groups. No single view of what was live, what was late, or who owned what. Leadership had zero real-time visibility.

## What was built

An Airtable campaign management hub with a dashboard for campaign status, a task Kanban for team execution, and project views for leadership oversight. Automations trigger status updates and deadline reminders.

## The result

Every campaign visible in one place. Tasks organized by status with clear ownership. Missed deadlines dropped by 60%. Leadership reviews went from hour-long catch-ups to a 5-minute dashboard check.

<b>30+</b> Campaigns Managed	<b>100+</b> Tasks Tracked	<b>60%</b> Fewer Missed Deadlines	<b>15+</b> Team Members
---------------------------------	------------------------------	--------------------------------------	----------------------------

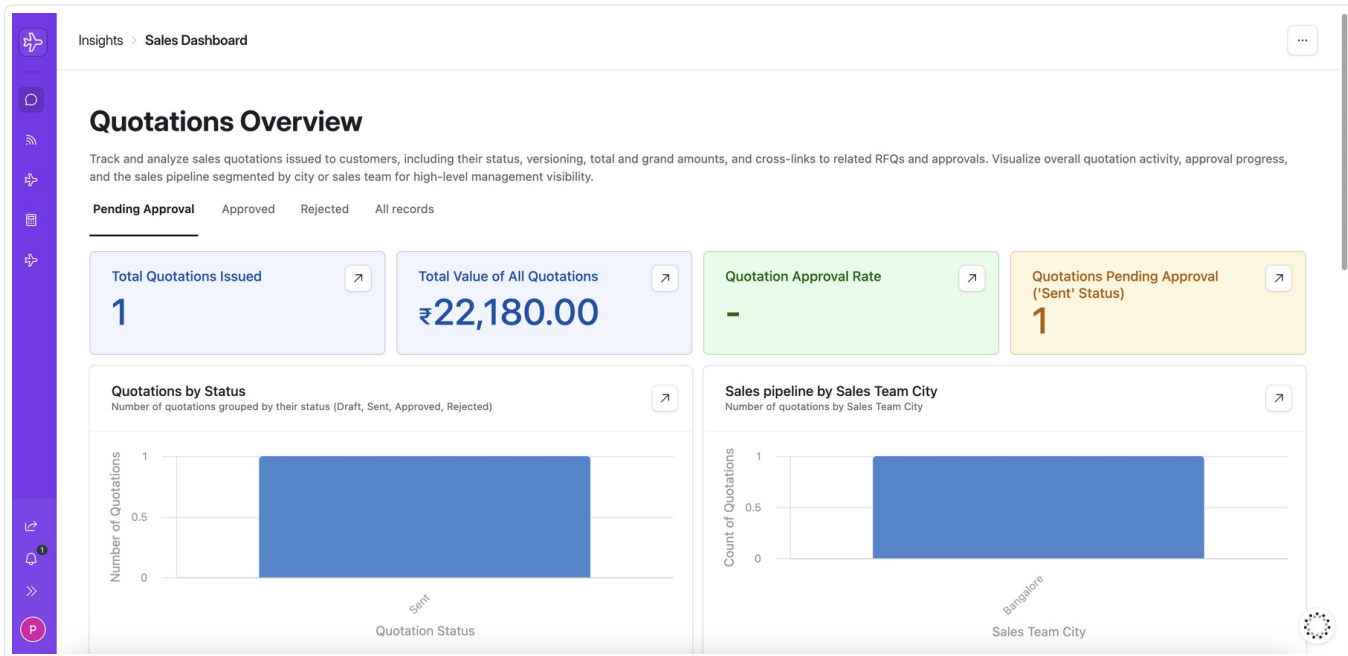
### Common question: Can Airtable replace project management tools?

For teams that outgrew Monday.com, Asana, or Trello - Airtable offers the same views with far more flexibility in how data connects.

CASE STUDY 03

# Pongs India

Interior Product Distributor | Quote Tool and Inventory Management App



Pongs India - Quotation management app built in Airtable

The challenge	What was built	The result
Customer quotes managed across WhatsApp and email. No pricing consistency, no centralized order history. Sales reps quoting from excels.	A linked system connecting a product catalog with a quoting interface. Sales reps generate quotes in minutes with automated pricing. Managers see a live pipeline.	Quote generation time cut by 70%+. 400+ SKUs structured. Zero pricing errors since go-live. 12,000%+ ROI on first project.

<b>70%+</b> Faster Quoting	<b>400+</b> SKUs Structured	<b>0</b> Pricing Errors	<b>12,000%+</b> ROI
-------------------------------	--------------------------------	----------------------------	------------------------



## INTEGRATIONS

# Airtable works best when it talks to everything else.

The real power shows up when Airtable connects to the tools the team already uses.

	Name	Rep	Sales Stage	Priority	Expected Close Date	Forecast Value	Probability	Last Contact	Signed Contract Value	Note
1	Hephaestus Capital	Katrina Frey	Closed-Won		1/2/2017	\$6,500.00	80%	12/30/2016	\$6,750.00	1/2/17
2	FireBasket	Marcellus Wong	Closed-Won		1/3/2017	\$7,100.00	80%	1/2/2017	\$6,890.00	1/2/17
3	The Handy Hunchwomen, LLC	Kendrick Anar	Closed-Lost		1/5/2017	\$8,300.00	20%	12/30/2016		1/2/17
4	Bob's Cabinets	Katrina Frey	Negotiation		1/6/2017	\$3,000.00	10%	1/6/2017		
5	Four Horsepeople Flooring & Tile	Emily Rintaru	Contract		1/9/2017	\$12,500.00	60%	1/10/2017		1/3/17
6	The Gingerbread Men Patisserie	Cara Ricci	Closed-Won		1/9/2017	\$9,500.00	90%	1/9/2017	\$9,250.00	
7	Nebungen Jewellers	Stephan Oswald	Closed-Won		1/11/2017	\$10,190.00	75%	1/11/2017	\$9,850.00	
8	Calligra	Bernard Casper	Negotiation		1/13/2017	\$4,500.00	75%	1/10/2017		
9	Quoddy	Bernard Casper	Evaluation		1/6/2017	\$8,000.00	60%	1/10/2017		
10	Hydrex Appliance	Deepa Vartak	Negotiation		1/10/2017	\$8,200.00	70%	1/10/2017		1/11/17
11	The Calicut Courts	Katrina Frey	Contract		1/16/2017	\$11,350.00	90%	1/12/2017		
12	Leah's Aid	Katrina Frey	Negotiation		1/16/2017	\$3,000.00	65%	1/12/2017		
13	Chross Farms	Emily Rintaru	Closed-Won		1/24/2017	\$14,000.00	40%	1/9/2017		
14	Morgan's Magical Meats	Cara Ricci	Negotiation		1/24/2017	\$5,350.00	20%	1/10/2017		
15	Crosley Cast Iron	Marcellus Wong	Evaluation		1/26/2017	\$5,750.00	70%	1/13/2017		
16	Hotel Abyssinian	Stephan Oswald	Evaluation		1/27/2017	\$2,150.00	90%	1/12/2017		1/13/17
17	The Sphynx	Kendrick Anar	Qualification		1/27/2017	\$7,500.00	75%	1/12/2017		
18	Albertsons & Associates	Kendrick Anar	Evaluation		1/30/2017	\$11,750.00	60%	1/9/2017		
19	United Kickball League	Bernard Casper	Qualification		1/30/2017	\$6,000.00	50%	1/12/2017		
20	The Savannah Hotel & Confer...	Deepa Vartak	Qualification		1/30/2017	\$6,800.00	80%	1/13/2017		
21	Bubbal Plaza	Stephan Oswald	Qualification		1/31/2017	\$5,300.00	70%	1/9/2017		

Airtable as the data backend connecting to external tools

1

## Airtable + Softr: Client Portals

Softr turns Airtable data into branded, login-protected portals. Client project trackers, vendor portals, member directories - all powered by Airtable on the backend.

2

## Airtable + n8n: Workflow Automation

n8n connects Airtable to hundreds of apps with conditional logic, error handling, and retries. Orders trigger invoices, WhatsApp messages, and CRM updates automatically.

3

## Airtable + Monday CRM: Sales Pipeline Sync

Sync deal stages, contacts, and activities between Monday CRM and Airtable. Sales teams work in Monday while ops and fulfillment run on Airtable - both stay in sync.

4

## Airtable + OpenAI + Slack: AI-Powered Notifications

OpenAI summarizes new Airtable records and pushes smart alerts to Slack channels. Support tickets get auto-categorized, leads get scored, and teams get briefed without checking dashboards.

5

## Airtable + NanoBanana Pro: Content Operations

NanoBanana Pro handles creative production while Airtable manages the editorial calendar, approvals, and publishing schedule. Briefs flow in, assets flow out - fully tracked.

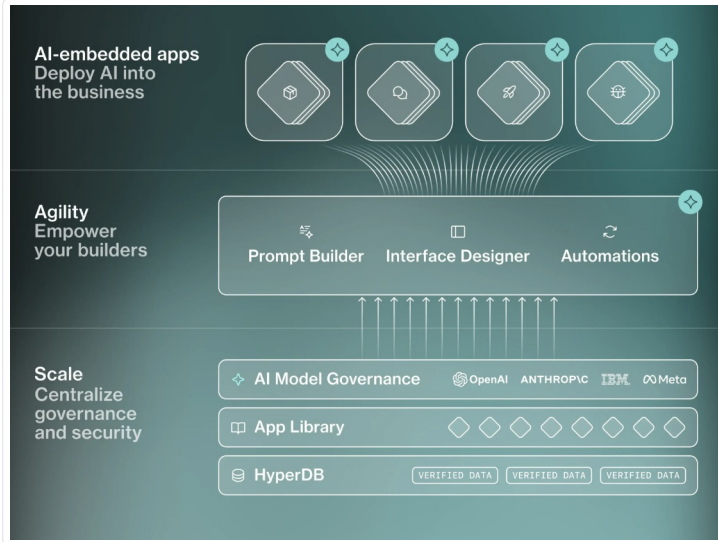
ENTERPRISE

# Airtable at scale: governance, security, and compliance.

For larger organizations, Airtable offers enterprise-grade features for IT, legal, and compliance teams.

**Enterprise-grade from day one.**  
SOC 2 Type II | ISO 27001 | HIPAA | GDPR | Encryption Key Management | Data Loss Prevention

Feature	What it does
Enterprise Hub	Centralized control, admin panel, granular permissions, user provisioning, federated management
HyperDB	Up to 100M records per table. Connects to Snowflake and Databricks for massive datasets
Audit Logs	Complete activity tracking, exports, reporting. eDiscovery APIs. Revision history up to 3 years
App Library	Package apps with locked core structures. Push updates centrally. Scale across hundreds of users
Native Integrations	Jira, Salesforce, Slack, GitHub, Gmail, Snowflake, Stripe, Tableau, Zendesk, and 25+ more
Security	Enterprise Key Management, Data Loss Prevention, data redundancy across multiple zones



Airtable Enterprise - governance, security, and scale features

## IS IT A GOOD FIT?

# Quick readiness checklist: is Airtable right for you?

If 3 or more boxes get ticked, Airtable is very likely a strong fit.

- Important business data lives in spreadsheets, and it is getting hard to maintain
- Multiple team members need to access and update the same data with version issues
- Manual data entry, copy-pasting, or email follow-ups that could be automated
- Dashboards or reports are needed but expensive BI software is not justified
- Non-technical team members need a system they can use without heavy training
- Monday.com, Asana, or Notion was tried but found too rigid or too simple
- Data across departments needs to be connected without separate tools for each
- Budget for a custom tool is between \$500 and \$15,000

## Existing data migration

Data gets moved from spreadsheets, other tools, or legacy systems. Nothing left behind.

## Training and handover

Loom walkthroughs + live training session. Full documentation.

## Ongoing support

Two weeks post-launch support included. Phase 2 planning before go-live.

## Long-term partner

SBD has been operating for 3+ years. A team that stays involved.

### *Common question: What if the decision is not clear yet?*

That is exactly what the free strategy call is for. No commitment, no pressure. Just an honest assessment.

## OUR CERTIFICATIONS

# Certified to build what your business needs.

SBD holds official certifications from Airtable Inc.



## Additional certifications

Retool Certified Builder | SmartSuite Bronze Partner | n8n Certified, Level 2 | Make Advanced Certified | Zapier Expert | Bubble Builder Certified



THANK YOU FOR YOUR TIME

# Appreciate you going through this with us.

## Here is what happens next.

This guide is the starting point for a real conversation about what is possible for your business.

### 1 Book a Strategy Call.

Your operation gets reviewed together with honest recommendations on what to build first.

### 2 You get a custom proposal.

Clear scope, timeline, and fixed price. No vague estimates.

### 3 The build starts.

Highest impact item first. You see progress weekly until it runs like clockwork.

[Book Your Airtable Consultation & Adoption Call →](#)

info@smallbaydigital.com

pranav.mahaveer@smallbaydigital.com