CASE STUDY

Stabilizing Bookkeeping and Administrative Operations for a SaaS Client

SaaS · Accrual Basis · Bookkeeping & Administrative Support

15 Days	90%	100%	On-Time
Administrative transition completed without disruption	Faster follow-up and task resolution	Operational backlog fully resolved	Month-end close kept on track

THE CHALLENGE

- A 15-day transition window from a 15-year-tenured employee created significant continuity risk.
- Manual, paper-based workflows, including physical check deposits.
- High-volume AR/AP email traffic lacked structured ownership and tracking.
- A client bankruptcy increased the risk of delayed processing and operational backlog.

WHAT WE DELIVERED

- Executed a structured transition and documented recurring tasks through screenshot-based SOPs with direct reference links.
- Digitized manual workflows, including check deposit processing.
- Implemented a daily-monitored AR/AP inbox workflow with labels, ownership, and follow-up controls.
- Centralized consultant tracking for payroll, payments, and agreements.
- Used the SOP library to restore processing cadence and clear the backlog after the disruption.

THE IMPACT

CloudIT stabilized the client's back-office operations during a high-risk transition, completing the administrative handoff in 15 days without disruption, reducing follow-up time from days to hours, and clearing the backlog caused by a major business disruption. As a result, the CPA firm was able to maintain on-time month-end close while shifting more capacity toward strategic, CFO-level advisory support.

BUSINESS OUTCOME

- ✓ **Completed the 15-day transition without operational disruption**
- ✓ **Maintained on-time month-end close throughout the engagement**
- ✓ **Reduced follow-up time from 3-4 days to 3-4 hours**
- ✓ **Digitized key manual workflows, including check deposits**
- ✓ **Cleared the operational backlog created by the disruption**
- ✓ **Expanded support into additional work previously handled internally**