

CASE STUDY

It started as a single request through a Softr marketplace — a client portal. Fourteen months later, Active Digital (ACTXV) runs the operating system behind a growing architecture-and-construction firm: lead capture and qualification, an in-house sales desk, AI-assisted contracts, and a permit-grade project platform — all on Softr and Airtable.

4

operational systems, one platform

portal · lead automation · contract generation · AEC

14

months embedded — and counting

a maintenance plan that grew into a Growth retainer

30+

active projects in the platform

managed end-to-end, from lead to delivery

“The structure makes sense — the same quality, with a real team behind it, built to scale with what we’re building.”

— JUAN MEDINA, PRESIDENT, MEDINA DESIGN & DEVELOPMENT GROUP

Paraphrased — included only with the firm’s written approval

THE CHALLENGE

The firm came to ACTXV through a Softr marketplace with a single request — a client portal — but the real problem ran deeper: it was growing faster than the processes built to run it, and its owner had become the operational centre of gravity, and therefore the bottleneck.

Client status updates ran on phone calls, narrating information that already existed in the firm’s project-management system. Inbound leads arrived from third-party marketplaces into a manual process, with an outsourced call-answering service fielding them at a recurring monthly cost. Contract proposals were assembled by hand for every engagement. Financial data, project data, and client contacts each lived in separate systems that didn’t talk to one another.

The screenshot shows a client portal interface. On the left is a navigation menu with the MDDG logo and icons for Client Dashboard, My Projects (highlighted), My Invoices, Resource Center, and Schedule a Meeting. The main area is titled 'My Projects' and includes a search bar and a status filter. Two project cards are displayed, each with an 'Active' status tag, a progress bar, a current milestone, and financial data.

Project ID	Client	Address	Progress	Current Milestone	Total Cost	PAID
DQ0208	Catherine Hayes	224 Baxter ...	97%	7.1 NYC-Specific Post-Construction Co...	\$7,550	Paid in full
CQ0310	Catherine Hayes	224 Baxter ...	61%	Drywall & Interior Finishes	\$75,000	\$71,250

Client portal — live project status (demo data)

OUR APPROACH

A Client Portal

The first build addressed the most visible pain: the owner should not have to make phone calls to tell clients where their projects stood. ACTXV built a client-facing portal that reads live project status and surfaces it in real time. The morning status calls stopped. That was the first door.

Lead Automation + In-House Sales Desk

Inbound leads arrived with no routing, qualification, or consistent handoff, and an outsourced call-answering service fielded them at a recurring monthly cost. ACTXV built automated intake across the firm’s lead sources — capture, automatic follow-up within minutes, escalation, and auto-close — with scheduling wired in and AI-assisted qualification by service and region. This let the firm retire the outsourced call service and bring lead handling fully in-house: a sales dashboard, real-time alerts, and in-portal call logging for its own salesperson.

Contract Generation

Manual proposal assembly was consuming hours per project and producing variable output. ACTXV built an AI-assisted generation workflow: a single qualification submission produces a tailored scope, a fee calculation, and a duration and payment schedule, assembled into a ready-to-review agreement. Consistent output, at any volume, in a fraction of the time.

A Sector-Specific Operations Platform

The most complex build extended the system into the regulatory reality of the industry: a structured database mapping municipalities to districts to regulatory requirements, permit tracking, and a vendor database with automated work-request triggers on contract signing — with satellite, site, and 3D-scan imagery surfaced inside a single project view. No longer a client portal, but operational infrastructure for a regulated industry, built on the same Softr and Airtable foundation and extended until the platform understands the business it runs.

OUTCOME

The morning status calls are gone — clients see project status in real time, and the owner's time goes to running the business. The firm retired its outsourced call-answering service in favour of an in-house, in-portal sales system, and now works in one Softr/Airtable operating layer rather than across disconnected tools. Contract generation runs in minutes rather than hours.

What began as a single portal request has become the firm's operating system, moving at the pace of an embedded team rather than an external vendor. As the volume of work grew, the firm chose to expand the engagement — a decision driven by demand, not by a proposal.

CONTINUED PARTNERSHIP

What began as a single portal request through a Softr marketplace has become the firm's operating system. Every phase since has followed the same pattern: a constraint surfaces, ACTXV scopes and builds the solution, the business moves forward — portal, to lead automation, to contract generation, to sector-specific infrastructure. The clearest statement of what this engagement is came when the firm endorsed ACTXV's move to a structured, team-based delivery model. The retainer continues, and the scope keeps expanding.