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CAPABILITIES STATEMENT

TheOpsArchitect.io LLC is an SBA-certified Woman-Owned Small Business in Berkeley, California, providing CRM implementation, systems architecture, and business process improvement to public agencies, nonprofits, and small businesses. We design and build constituent and customer relationship management systems, migrate data off legacy platforms and spreadsheets, and automate manual workflows.

CORE COMPETENCIES

- CRM implementation and configuration in Zoho One, Zoho CRM, and HighLevel
- Constituent, case, and records management system design
- Data migration, cleansing, and legacy system retirement
- Business process reengineering and workflow automation
- Requirements gathering, gap analysis, and systems architecture
- Reporting and dashboard design for operational and executive visibility
- Standard operating procedure documentation and end user training

DIFFERENTIATORS

- **Process before technology.** The workflow is mapped and redesigned before anything is configured. Most failed implementations are process failures, not software failures.
- **One practitioner, start to finish.** All work is performed in the United States by the founder. No offshore delivery, no subcontracting, no account handoffs.
- **Documented quality method.** A DMAIC approach drawn from Six Sigma, with requirements sign-off, sandbox build, user acceptance testing, and post-deployment review.
- **The agency keeps the process, not just the software.** Every engagement produces written standard operating procedures, so the organization retains the knowledge.
- **Operations background, not only software.** 25 years across corporate sales, nonprofit program management, and technology implementation.

EXPERIENCE

Industrial Equipment Distributor. CRM diagnostic audit and optimization roadmap covering pipeline structure, data integrity, and sales process design. Delivered and accepted.

Community Services Nonprofit, Berkeley, CA. Donor and membership CRM assessment, including data architecture review and a prioritized remediation plan presented to executive leadership.

Residential Contractor. Systems and web presence build, including lead capture, workflow design, and documentation handoff.

Principal experience. Direct operational management of social service programs and volunteer workforces. Client references available on request.

COMPANY SNAPSHOT

CAGE CODE	22H15
UEI	NGXDQLBVXGK5
CA ENTITY NO.	B20260066424
PURCHASE & CREDIT CARDS	Accepted
AREA SERVED	Remote, nationwide

NAICS CODES

541512	Computer Systems Design Services (primary)
541611	Administrative Management and General Management Consulting Services
541618	Other Management Consulting Services
611420	Computer Training

LICENSES & CERTIFICATIONS

- SBA-Certified Woman-Owned Small Business (WOSB), certified August 18, 2026
- Small Business
- Woman-Owned