

CASE STUDY

Embedded Operations and Compliance Support

Managed system operations, process improvement, and SOC 2 readiness support for a managed services organization.

EMBEDDED DELIVERY

MANAGED OPERATIONS

SOC 2 READINESS

POSITIONING LINE

Graennlab delivered managed operations, system ownership, and embedded execution for ConnectWise and SOC 2 readiness, stabilizing and improving the client's internal delivery engine.

Work Type	Managed operations, embedded delivery, compliance program support
Client Need	Day-to-day ownership of operational systems, workflow improvements, reporting, and SOC 2 planning
Graennlab Role	System owner, improvement engine, compliance planning support, and embedded project coordination
Core Tools	ConnectWise, ConnectWise Sell, operational dashboards, helpdesk workflows

Client Challenge

The client needed more than advisory support. Its teams required hands-on ownership of service-management tooling, workflow fixes, reporting setup, operational support, and structured planning for SOC 2 Type 1 readiness. The engagement eventually expanded into several layered workstreams, including managed operations, compliance program support, and embedded coordination.

Graennlab Approach

Graennlab operated inside the client environment as an execution layer. The team assumed operational responsibility for ConnectWise and ConnectWise Sell, supported tool configuration and workflow

improvements, resolved system issues, and added structure to SOC 2 readiness activities through planning, milestone definition, policy preparation, and evidence-gathering support.

Work Performed

- Assumed day-to-day responsibility for ConnectWise and ConnectWise Sell operations.
- Fixed workflow rules, email automation behaviors, service-ticket defaults, permissions, user setup, and reporting issues.
- Built dashboards and operational reporting for leadership visibility.
- Developed and refined helpdesk workflows, monitoring boards, ticketing workflows, and workload views.
- Supported structured project work including security role overhaul, process and technology enablement, procurement module changes, onboarding workflows, and cloud demo process flow.
- Created a SOC 2 Type 1 project plan with tasks, milestones, preparation structure, policy/procedure support, and evidence-gathering activities.
- Provided embedded project coordination support aligned to client leadership direction.

Outcome

The engagement gave the client a practical operating layer: managed tooling, workflow governance, reporting, issue resolution, SOC 2 planning support, and embedded execution capacity. The function matured enough that the client ultimately internalized the role through a full-time hire, allowing Graennlab to transition off after final invoicing and payment completion.

WHY IT MATTERS

This engagement demonstrates Graennlab's ability to move beyond advice and provide embedded execution, governance, and operational momentum inside client environments.