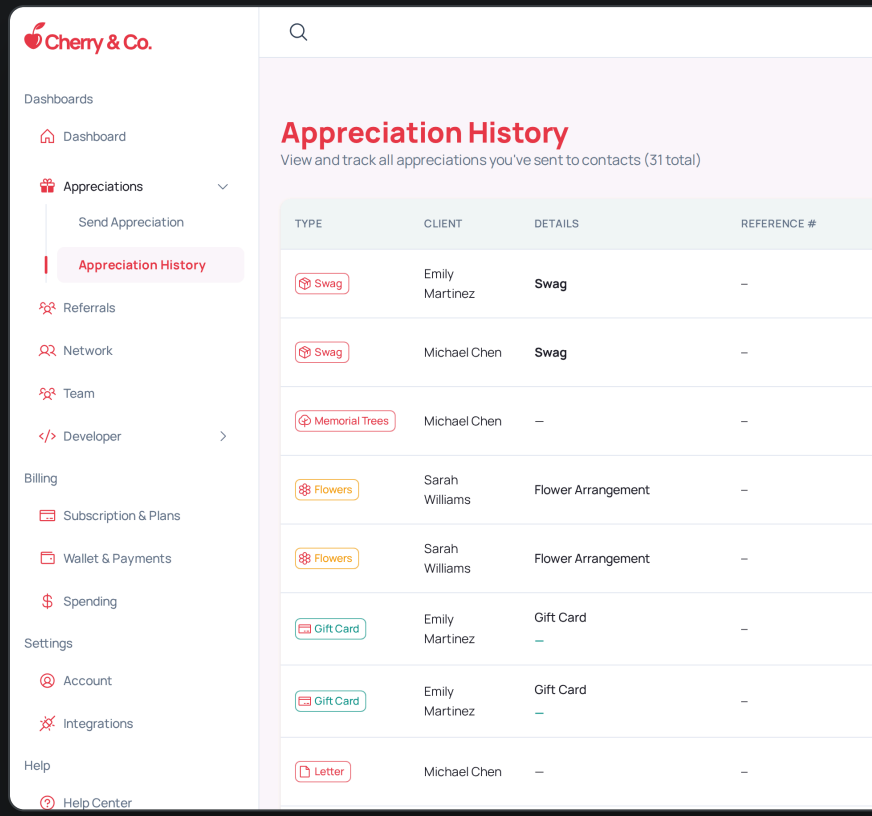
pa. project assistant.

CASE STUDY / 001 · MULTI-TENANT SAAS BUILD · DEC 2025 → LIVE JUN 2026

CLIENT & TEAM APPRECIATION · INSURANCE AGENCIES

A founder's prototype became a platform he can sell.

One funded wallet, six kinds of gift, and spending limits an owner sets once. All inside a platform Cherry & Co. owns, bills its own customers on, and can sell to any agency. Live since 25 June 2026.



CLIENT

Cherry & Co.

Founded by three insurance agency owners in Texas.

ENGAGEMENT

Prototype → real product

Questions, rebuild, launch, and running it since. Dec 2025 → Jun 2026.

PRODUCT

One platform, many agencies

Owner, producer and service roles, a prepaid wallet, six gift types.

AT A GLANCE

Two customers, both better off.

FOR THE AGENCY OWNER · SENDING	4 → 1 Four disconnected tools, in the founders' own words, replaced by one place to send that drives six third-party services.
FOR THE AGENCY OWNER · CONTROL	Invisible until spent → **Per-role limits, enforced at send** Owners set a limit once instead of approving every request.
FOR THE AGENCY OWNER · APPROVALS	Stalled when an owner was out → **Team sends within its limit** The owner stops being the bottleneck on a single small gift.
FOR CHERRY & CO. · THE BUSINESS	Prototype, no payments → **Payment-first signup, live since Jun 2026** Our client's own product: every new agency pays before it gets an account, on live card processing since 25 Jun 2026.

THE PROBLEM

The work of keeping relationships was buried under the software meant to help.

“One tool for network outreach, another for staying in touch, another for marketing, another for rewarding the team. None of them connected. Spending was hard to track; approvals stalled the second we stepped out of the office, and somewhere underneath all that software, the actual work of building & maintaining relationships was getting buried.”

ANDREW, KYLE AND NICK · CO-FOUNDERS, CHERRY & CO.

FOUR TOOLS, FOUR LOGINS, FOUR CHECKOUTS

Outreach | Staying in touch | Marketing | Team rewards → One platform

WHAT IT COST THEM

Staff time on every send

A postcard, a gift card and flowers meant three vendor sites, three logins, three checkouts.

Spend they could not see

Spending on gifts sat across separate supplier accounts. Hard to track, hard to budget.

Work that stopped at the owner

Teams could not send while the owner was out, and owners could not easily say yes.

An idea that could not take money

The founder's prototype proved the concept, but it could not charge a customer, keep each agency's wallet and client book separate, or carry real money.

The founders' own account, published on their About page. They are insurance agency owners, not engineers, which is why the problem had gone unsolved.

THE SOLUTION · 01

Rebuild on a foundation that can take money, and keep what the prototype got right.

THE ALTERNATIVE

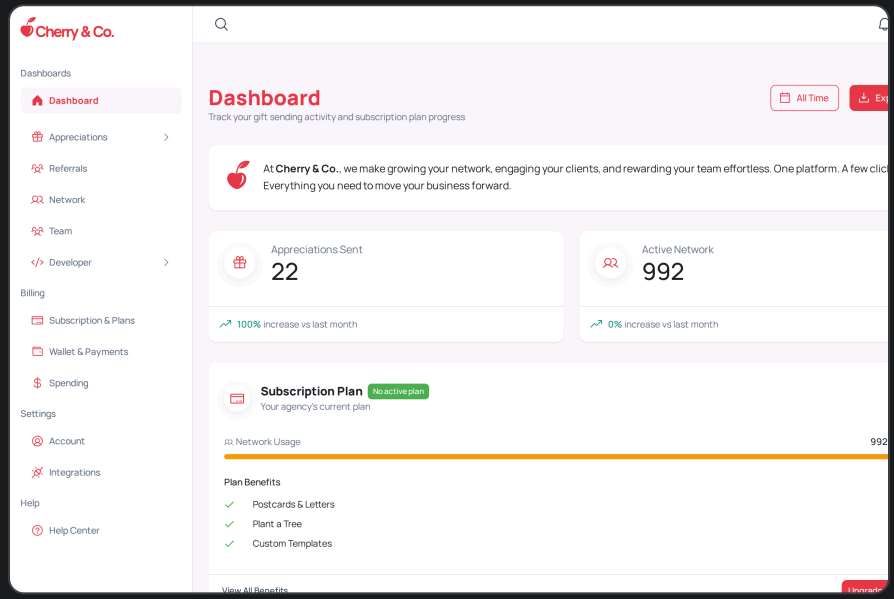
Convert the AI-built prototype and live with its shortcuts. Faster to demo, cheaper to start.

OUR CALL, IN WRITING

Rebuild on a foundation built to take real money, and carry forward by name the four things the prototype got right.

WHY

It had to take card payments and drive four suppliers that charge real money on an agency's behalf. A prototype foundation could not carry that.



THE SHIPPED PLATFORM — ONE DASHBOARD FOR EVERY APPRECIATION TYPE (DEMO AGENCY, TEST DATA SHOWN)

Before a line of code: 32 clarification questions across seven domains, answered in writing. Nine had to be answered before starting: spending limits, account ownership, billing, data privacy and scope. The questions that stop a build surfaced on day one, not halfway through.

THE SOLUTION · 02

The client overruled us, and he was right.

THE CLIENT OVERRULED US

A prepaid wallet, not a card charge per gift

Alternative: charge the card for each gift. Our recommendation, and the lighter build.

His call: a prepaid wallet. Dozens of small card charges a month is an accounting problem for an agency owner. He had context we didn't.

How it turned out: the wallet became load-bearing. It funds flowers, merchandise and gift cards, and it is what makes per-role spending limits enforceable, which was the founders' first complaint.

WE PUT THE CONSEQUENCES BACK

One merchandise account, not one per agency

Alternative: each agency connects its own fulfillment account, as the client's team proposed.

Our ruling: the supplier's full catalog is far too large to put in front of an agency, and separate accounts for each agency would have broken the wallet.

How it turned out: within a week the platform-owned model was adopted. Each agency gets a chosen catalog, with its own logo on what ships.

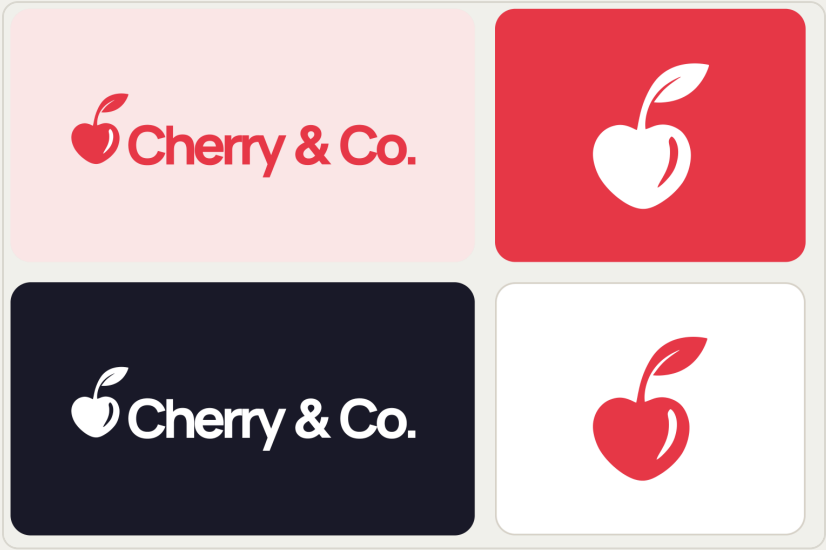
Both calls were put in writing with the consequences spelled out. One we won, one we lost. The one we lost is now the part of the product the spending controls depend on.

THE SOLUTION · 03

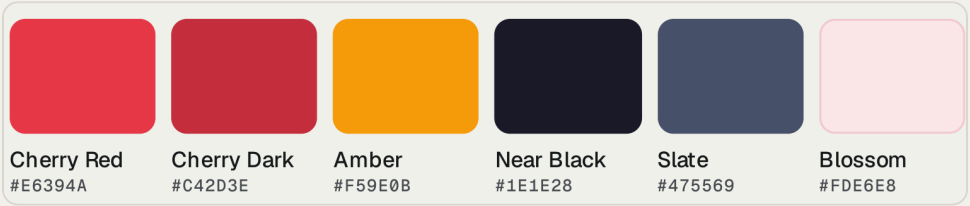
The brand came first, in December 2025, before any code.

A platform an agency sends gifts from is, to its customers, the agency's own gesture. It had to look like something a professional would put their name on before it could be sold to anyone.

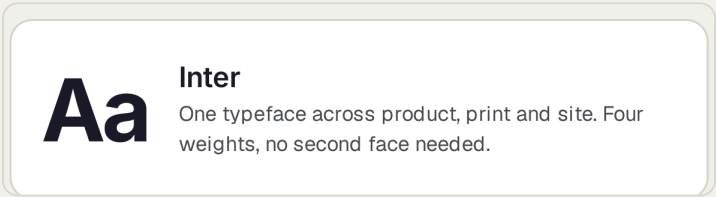
So we designed the identity at the start: the cherry emblem, the wordmark lockups, one typeface, and a color system with a single red used deliberately: for the action, never as decoration. The platform, the printed postcards and the marketing site were all built out of it.



LOGO & EMBLEM



COLOR SYSTEM



TYPOGRAPHY

THE SOLUTION · 04

Built on parts the client owns outright.

EVERY ACCOUNT IN THE CLIENT'S NAME

The code, the database, the hosting and the web address all belong to Cherry & Co. If they ever replaced us, they would keep the platform and every customer record. And each agency's wallet and client list stay separate from every other agency's, so taking on a new one costs nothing extra to run.

THE SOLUTION · 05

We built it with AI, against a standard set before any code.

The founder had already proved what an AI app-builder can do, and what it can't. We built the real thing with AI, and set a fixed standard in front of it. Work had to meet that standard before it counted as done.

WHAT EVERY PIECE OF WORK HAD TO PASS

01
A written description of the work, checked by someone else before any code.

02
The work itself, with its own tests.

03
A second review by a different AI, which scored every problem it found.

04
A perfect score before it could go on. Fix and re-review until clean.

05
A check that the whole product still hung together.

06
Tests run on their own, then again after every release.

07
Tested on our own machines, then on a practice copy, then live, checked at each step.

08
Anything skipped written down, with the reason.

Our team set the standard and directed the work. No person signed off each change by hand; the check that held the line was the automated review and the score it had to reach.

THE SOLUTION · 05

What it bought the client.

Weekly cycles, not quarterly releases

Twenty-nine releases went live in the two weeks before launch.

No AI in the product, on purpose

Nothing in the platform sends customer data to an AI.

Release figures are counts from the project's own history. They aren't split between what AI wrote and what people wrote.

THE SOLUTION · 06

Money first, features second.

The platform's job is to move an agency's money out to four suppliers without losing it. Everything else was built behind that.

BUILT FOR THE MONEY PATH

01 Signup rebuilt payment-first: every new agency pays before it gets an account, through bank-verified checkout.

02 A prepaid wallet funds all six gift types, with limits per role and full transaction history.

RUN LIKE A SERVICE, NOT A PROJECT

01 Every change tested on our machines, then a practice copy, then live, with payment checks before each release.

02 Weekly client cycles: the client set the agenda, and that week's work shipped that week.

03 Renamed mid-build: the old name was written throughout the product. We moved it by running both web addresses at once, with no downtime.

DEC 2025	APR 2026	MAY 2026	25 JUN 2026	6 JUL 2026
Engagement begins; 32 questions answered in writing	First real agencies set up on the live platform	Rebrand to Cherry & Co., new web address	Card payments live. Real charges go through	Build closed out; platform live end to end

For the record: twenty-nine releases went live in the two weeks before launch. That is pace, not proof. The proof is that the client kept setting the agenda every week.

THE SOLUTION · 07

Every capability answers something it cost them.

01

One place to send, six gift types

Postcard, letter, gift card, flowers, memorial tree or branded merchandise. One place and one wallet, instead of six supplier websites.

02

A prepaid wallet with limits per role

Owners fund once and cap what each role can spend, so approvals stop being a bottleneck.

03

Spending, visible while it happens

A spending dashboard and transaction history replace "hard to track".

04

The agency's brand on what arrives

Its logo is applied to print and merchandise, so the gift comes from the agency, not from a platform.

05

Their own systems, connected

On the Premium tier, agencies can connect their own tools to the platform themselves, without waiting on us to build it for them.

06

A curated catalog instead of a warehouse

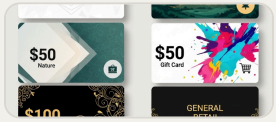
The merchandise supplier's catalog is far too large to put in front of an agency. Agencies see a chosen set, carrying their own logo.



POSTCARDS



LETTERS



GIFT CARDS



FLOWERS



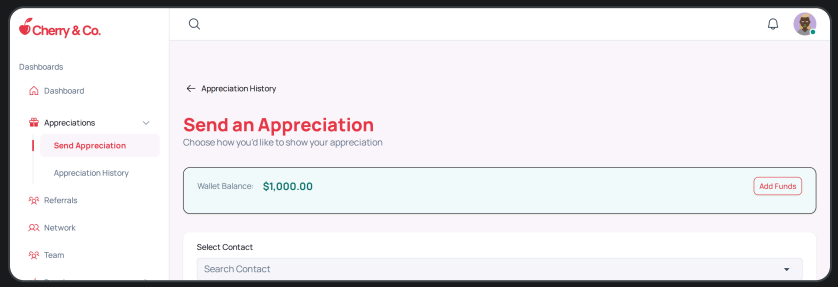
MEMORIAL TREES



BRANDED MERCH

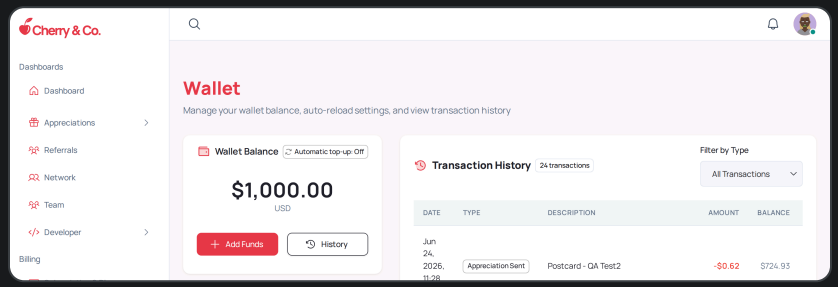
THE SOLUTION · 08

The proof, in the product.



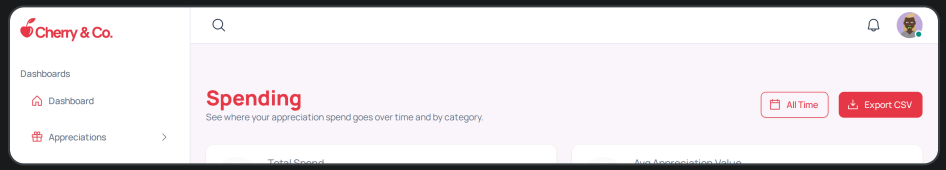
One place to send, six kinds of gift

Postcard, letter, gift card, flowers, tree or branded merchandise — chosen and paid for from the same wallet, instead of six supplier websites.



The wallet the client insisted on

Balance, limits and every transaction in one ledger. It funds all six gift types and is what makes per-role spending caps enforceable.



Spending visible while it happens, not after

A live view by person and category, answering the founders' own complaint that spending was hard to track across separate supplier accounts.

Each screen answers something the founders said the old way cost them: too many logins, no oversight, and approvals that stalled when an owner was out.

The live platform, shown with a demo agency and test data.

THE RESULTS

A prototype became an asset the client owns and can sell from.

Four disconnected tools → **One place to send, six third-party services behind it**

Postcards and letters, gift cards, flowers, merchandise, payments and the emails that go with them. All live.

Spend invisible, approvals stalled → **Funded wallet, limits per role**

Owners cap spending once; their team sends inside it without waiting for a yes.

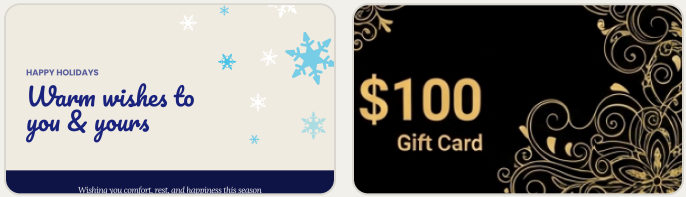
A prototype that could not charge → **Payment-first signup, live 25 Jun 2026**

Agencies pay before they get an account, on live card processing.

An idea inside an app-builder account → **An asset in the client's own accounts**

The code, the databases, the hosting and the web address all belong to Cherry & Co. We run them, and the relationship continues.

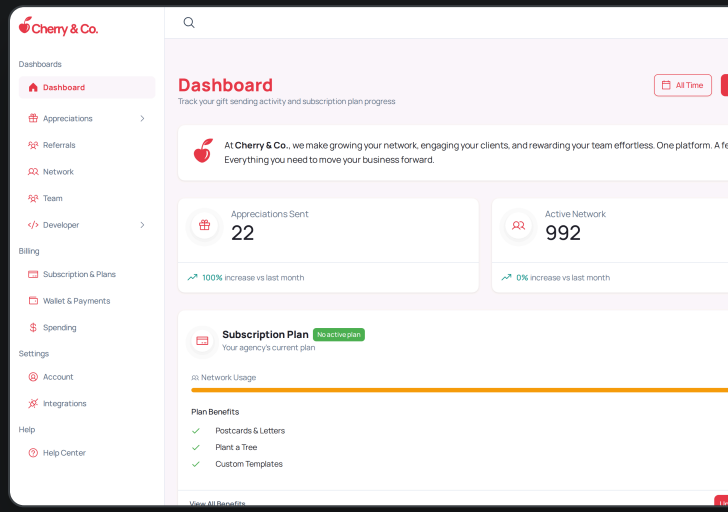
> "So, we built the platform we wished existed. Cherry & Co. brings everything that grows an agency — your network and your team — into one place."
>
> ANDREW, KYLE AND NICK · CO-FOUNDERS, CHERRY & CO.



POSTCARD DESIGNS AND GIFT CARDS THAT SHIP FROM THE PLATFORM (TEST DATA SHOWN)

Live since 25 June 2026, with agencies signing up, funding wallets and sending through the platform.

Got a prototype that proves it works?



The next step isn't more features — it's a foundation that can take money, keep every customer's records in their own space, and survive the vendors it depends on. That's the build we do: discovery in writing, decisions with their alternatives on the record, and the platform operated after launch.

What we'd start with.

The questions that block a build: who owns the account, how money moves, what happens when a vendor fails. Answered before code, in writing.

What you'd end with.

A platform in your own accounts, charging your own customers, and a team that keeps it running.

Talk to Project Assistant: projectassistant.org