INNERWORKS

Where intention meets infrastructure.

The inner workings of your business, handled.

CASE STUDY

Underdog Investor Group

Membership and education · 2026

CASE STUDY · UNDERDOG INVESTOR GROUP

25 Hours A Week Back, And Twelve Automations That Did Not Need Me

Underdog Investor Group is a membership and education company serving **1,500+ active members** across two tiers. Its coaching calls, community and course library, client onboarding, customer records, payments and onboarding survey each lived in a separate tool, and nothing moved between them.

~$6,000/mo	25+ hrs	12	6 → 1
recurring revenue retained, churn cut from 15.5% to 8–10%	returned to the team every week, across five departments	automations handed over to the team	tools, joined into one screen

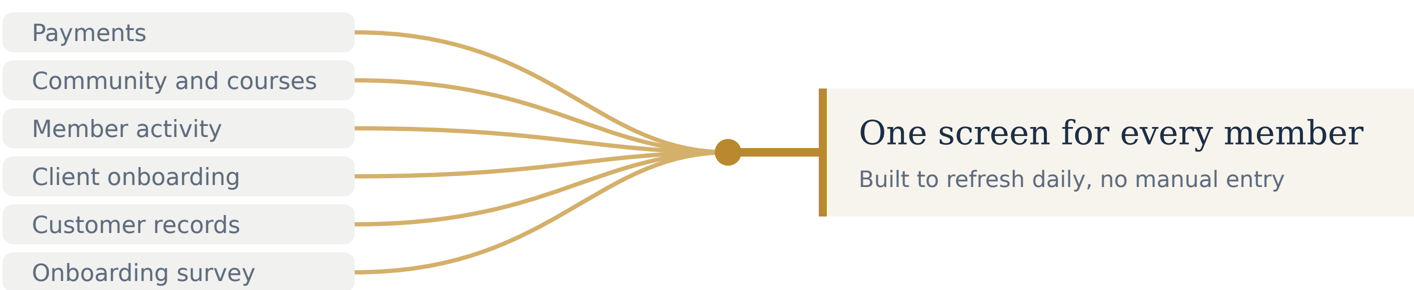
THE SITUATION

Nobody could say which members were about to leave. Finding out meant opening six tools and cross-referencing them, so it happened rarely and late, after the decision had been made.

Five departments spent 25 hours a week on cross-checks, write-ups and follow-ups by hand.

SIX SOURCES, CHECKED BY HAND

ONE PICTURE



WHAT WAS BUILT — Six Systems Across Five Departments

1 THE FOUNDATION

One Profile For Every Member

Six systems in one self-updating profile per member. The warning and live screen run on it.

2 CUSTOMER SUCCESS · 8 HRS/WK BACK

An Early Warning On Who Will Cancel

Sorts members into six risk levels and flags them before day 96, when cancellations peak.

3 CONTENT & COMMUNITY · 7 HRS/WK BACK

Every Call Into The Library

Every live call automatically transcribed into a polished, human-sounding article and cataloged into a well-organized library.

4 CLIENT DELIVERY · 4 HRS/WK BACK

Automatic Client Check-Ins

Created for every 3, 6 and 12-month client, onboarding to renewal, none of it by hand.

5 MARKETING · 4 HRS/WK BACK

Automatic Community Updates

Platform changes written up and posted to the community twice a week, automatically.

6 LEADERSHIP · 2 HRS/WK BACK

The Weekly Numbers, Live

A live screen replaced the weekly spreadsheet and flags any automation that stops.

Where the hours came back, and how it ended →

THE HOURS Hours A Week, Back To Five Departments

Customer Success Checking six tools for at-risk members	8
Content & Community Every call replay, written up and posted	7
Client Delivery Tracking client milestone dates and follow-ups	4
Marketing Writing the twice-weekly update by hand	4
Leadership The weekly numbers, pulled together by hand	2
Total Returned Two thirds of a full-time role, every week	25+

~$6,000/mo

Revenue Retained

Churn held at 8–10% instead of 15.5% kept roughly 60 members a month who would otherwise have left, on a $97 membership. Those members also buy the coaching programs, at $6,500 to $25,000.

> *"It didn't take very long for us to hire him on the spot. His ability to find gaps and holes in our frameworks, inside of our systems, and to use his skill sets in AI to help plug them was second to none. Not only did he change my life and my business, but he will do the same for you."*
>
> **COLIN MASON** · Co-owner, Underdog Investor Group

THE EFFORT What It Asked Of Them

Access and answers
to their six tools, and to my questions.

Their own accounts
for all twelve automations to run on.

Their team's cooperation
The build and the handover were mine to carry.

How The Engagement Ended

kristian@innerworkshq.com

It closed with the team owning everything: twelve automations on their own accounts, with written guides to running them and how they fit together. **Nothing was left depending on me.**

Want to see what this looks like in your business? **Start with the free audit.**

BOOK A CALL