Business challenge
SquarePeg Leadership wanted to nurture client loyalty and pave the way for growth. How could it spend more time on value-added services and less time on repetitive administration tasks?

Transformation
IBM® Connections Cloud™ enables SquarePeg to share documents and ideas more effectively, boost project-management efficiency by up to 40 percent and dedicate more time to value-added client services.

Business benefits:
- Enables faster, more effective communication between clients and coaches
- 25% boost in efficiency for one-on-one leadership coaching
- 40% increase in efficiency for a recent business-development project

SquarePeg Leadership
Helping clients cultivate productive work environments with collaboration in the cloud

Founded in 2005, SquarePeg Leadership provides one-on-one and team leadership coaching—helping people to develop their natural strengths. Through individual sessions and team-building exercises, the company enables its clients to cultivate collaborative and productive working environments.

“Castlebreck showed me the difference a collaboration solution can make—regardless of company size.”
Delaney Tosh
Leadership Coach
SquarePeg Leadership

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Nurturing client loyalty

For small companies, building a loyal client base is a key factor for success, and every client interaction is an opportunity to deliver the kinds of personalized services that drive retention. Close client relationships are particularly important in the leadership coaching space—but repetitive administration tasks can reduce the amount of time available to delight customers with tailored services.

This was the challenge facing SquarePeg Leadership, a leadership coaching provider that serves private, enterprise and government clients across Canada. To protect its valuable client relationships and pave the way for future growth, the company aimed to spend less time on project management and more time on client engagement.

Delaney Tosh, Leadership Coach at SquarePeg Leadership, takes up the story: “Each client’s requirements are unique, and leadership coaching is a discipline that covers a wide range of skill sets—including time management, communication and team engagement. Depending on a client’s goals, we may work one-on-one or in groups—and some large projects can involve up to 30 stakeholders. For these projects, we work with our extended team, additional providers and subcontractors to staff the project with the right resources for the client.

“Whether we’re coaching an individual or running an ideation workshop for 15 people, we rely on an extensive library of learning materials to support the learning process. In the past, we used email to share these documents with our clients. However, the challenge with this approach was that identifying, locating and sharing the correct documents was a repetitive and time-consuming process.

“Traditional collaboration tools also made it difficult for our clients to share ideas in between face-to-face sessions. Email threads could often run to 50 messages long, which meant it was hard to keep up with the discussion, or to maintain version-control for shared documents. What’s more, the email approach made it difficult to assign responsibilities to our subcontractors and ensure that each project was moving forward smoothly.”

Adopting a social platform

To solve the challenge, SquarePeg Leadership worked with IBM Premier Business Partner Castlebreck to develop a new approach for collaboration based on IBM Connections Cloud—a social networking platform that combines email, instant messaging, document editing, file sharing and more.
“A big part of being an effective leadership coach is about how effectively you manage your time and present yourself to your clients,” continues Delaney Tosh. “That’s why when Castlebreck asked me to help shape their new online training course for IBM Connections Cloud, I realized it would be a valuable opportunity to take a fresh look at our way of working.”

**Strong partnership**

Working with expert consultants from Castlebreck, SquarePeg Leadership discovered ways to use IBM Connections Cloud to improve project management efficiency and foster closer collaboration.

“Castlebreck ran a number of deep-dive training sessions that brought me together with other thought-leaders from the leadership coaching industry, which was a very instructive experience,” recalls Delaney Tosh. “That knowledge-sharing helped us to apply social business approaches to our work. One great example is in the process for working with new one-on-one clients for the first time, which tends to follow a standard pattern.

“Castlebreck showed us how creating private IBM Connections communities with new clients could help us to eliminate this duplicated effort by offering us a single point to share training materials, submit assignments and answer any questions between sessions.”

Based on the results of the engagement, Castlebreck launched the Connected Collaboration Institute—an interactive online course that includes best practices for IBM Connections Cloud.

Delaney Tosh continues: “For small businesses, collaborating with subcontractors is a valuable way to take on larger projects, but with larger teams there is always the risk that the time spent on project management grows out of proportion. Castlebreck provided us with best-practice approaches to compartmentalize each work stream of a large project into linked IBM Connections communities. This creates space for free-flowing discussions around ideation and reduces the administration required to keep the project on track.”

**Spending more time with clients**

Today, SquarePeg Leadership uses IBM Connections Cloud to engage with its clients—improving efficiency and freeing time to invest in personalized services that encourage retention.

“Without a doubt, adopting IBM Connections Cloud as our collaboration platform substantially reduces the time spent on repetitive administration tasks,” explains Delaney Tosh. “We estimate that managing our one-on-one projects is now 25 percent more efficient—and the benefits for our group projects are even more noticeable.

“We recently finished working with an organization on a large business development project, in which multiple stakeholders were constantly contributing ideas, adding links to websites and sharing files. Thanks to IBM Connections Cloud, we estimate that the project required 40 percent less administration than it would have done if we’d relied on traditional tools. Cutting administration enables us to invest more time in working with our clients to help them achieve their goals.”
Building closer relationships

SquarePeg Leadership’s IBM collaboration platform is also helping it to build closer and more effective relationships with its subcontractors.

Delaney Tosh adds: “From a project-management perspective, our IBM solution is definitely making it easier to assign roles and responsibilities and keep track of how our large projects are progressing. For example, we now use activities lists in IBM Connections Cloud to keep track of completed and outstanding actions — reducing the risk of missing an important deadline because key information got lost in the shuffle.”

Preparing for growth

Based on its initial successes with IBM Connections Cloud, SquarePeg Leadership is already planning innovative ways to use the platform.

“We are about to launch a large project with many stakeholders, and we need to ensure that every member of the team can have their voice heard,” says Delaney Tosh. “Inspired by the use cases for communities that we pioneered with Castlebreck, we are planning to create individual linked communities for each member of the project — offering them a personal space to keep track of all of their actions, files and communications.”

She concludes: “In the past, I assumed that IBM Connections Cloud was only a useful solution for large enterprises, but Castlebreck really showed me the positive difference a collaboration solution makes — regardless of your company’s size. The affordability of the solution really surprised me, and I wouldn’t hesitate to recommend it to other small- and medium-sized businesses.

“Looking to the future, I’m confident that I have the enterprise-class collaboration platform I need to take on far bigger projects and grow the business— all while providing the excellent level of service that existing clients have come to expect.”

Solution components

- IBM® Connections™ Cloud S1

Take the next step

To learn more about IBM Connections Cloud solutions, please contact your IBM representative or IBM Business Partner, or visit the following website: ibm.com/software/products/en/ibm-connections-cloud

To learn more about products and services from Castlebreck Inc., please visit: castlebreck.com

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