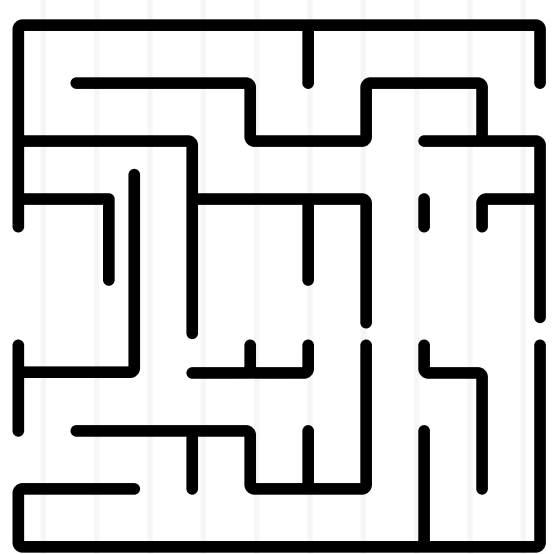


How Group Coaching Prevented a Valuable Client Departure



Our client, a boutique digital transformation agency, had a longstanding and successful partnership with an on-shore multinational SaaS company. For over a decade, they collaborated on 100+ projects, several of which earned prestigious industry awards. This deep collaboration eventually led to our client being named the agency of record for the SaaS company.

As part of this partnership, our client would occasionally augment the SaaS company's teams with professionals, bringing together people from diverse backgrounds to meet specific project needs.



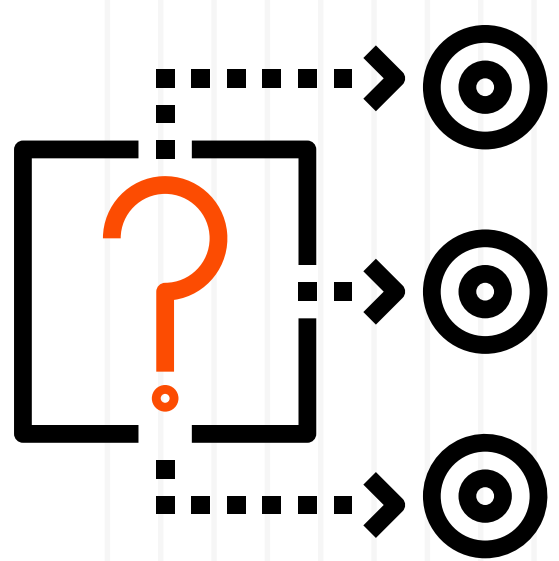
Business Challenge

Through a pioneering training program, our client onboarded several team members to bridge a technical skills gap while augmenting the SaaS company's workforce. Although these new hires were technically adept, challenges soon surfaced in areas critical to client-facing projects, such as work estimation, communication, and self-presentation.

This resulted in significant hurdles, putting a decade-long trusted relationship between the two organizations at risk:

- **Jeopardized Project Delivery:** The new hires struggled to fully grasp the scope of work and the level of expertise needed to meet the client's expectations. Repeated miscalculations in time estimations led to project delays, impacting overall delivery timelines.
- **Increased Project Costs:** With the extended project timelines, costs began to rise. The SaaS company, bearing the brunt of these delays, saw budgets being stretched as the project delivery dates kept shifting.

- **Negative Perception and Strong Feedback:** Lacking effective communication skills, the new hires began to create friction with the SaaS company's team. The situation escalated to the point where the client's feedback score dropped to 4 out of 10, and words like "arrogant" and phrases such as "lacked integrity" were used in reference to our client's team.
- **Burnout:** Determined to prove their capabilities, the new team members worked increasingly longer hours, pushing themselves to meet the deadlines. Unfortunately, this relentless effort only led to signs of burnout, which, if left unaddressed, could have resulted in high attrition rates—nullifying the client's investment in their training.
- **Strained Relationship:** Ultimately, this series of challenges began to erode the strong working relationship the two companies had spent over a decade nurturing, threatening the continuation of their partnership.

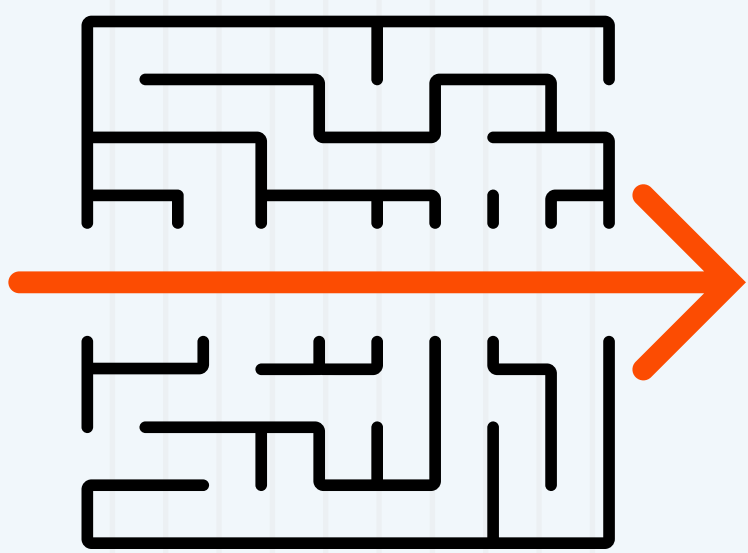


Cause

Several factors contributed to the difficulties faced during the project, which stemmed from gaps in soft skills and cultural awareness, rather than technical abilities.

- **Communication Challenges:** The new hires struggled with fundamental aspects of communication, such as providing timely updates, nurturing productive collaboration, and navigating difficult conversations. These gaps created misunderstandings and hindered the ability to resolve issues efficiently.
- **Cultural Differences:** Subtle differences in cultural norms led to misinterpretations. Certain behaviors were perceived as negative or rude, which could have been mitigated with proper rapport-building activities. Without establishing a positive working relationship, misunderstandings deepened, and communication gaps grew. The new hires also hesitated to address challenges openly, assuming that as professionals, they should know how to overcome obstacles on their own without seeking help.
- **Inadequate Work Estimation Skills:** A critical aspect of client-facing work was overlooked—accurately scoping the project. The new team members failed to thoroughly assess the required skill sets, time, and resources needed to meet the client's expectations. As a result, feasibility issues often came to light too late, typically during final presentations, frustrating the SaaS company's team.

- **Self-Representation Challenges:** In a remote work setting, the new hires lacked the skills to present themselves with expected professional standards. For example, many avoided turning on their cameras during meetings, missing the opportunity to build trust and engage more directly with the client.



Solution

The People Transformation team identified key areas for improvement and developed a customized Professional Development Plan (PDP), specifically tailored to the challenges faced by the new team members.

This was a 6-month group coaching program designed to address gaps in communication, work estimation, and self-presentation to ensure a more seamless client interaction.

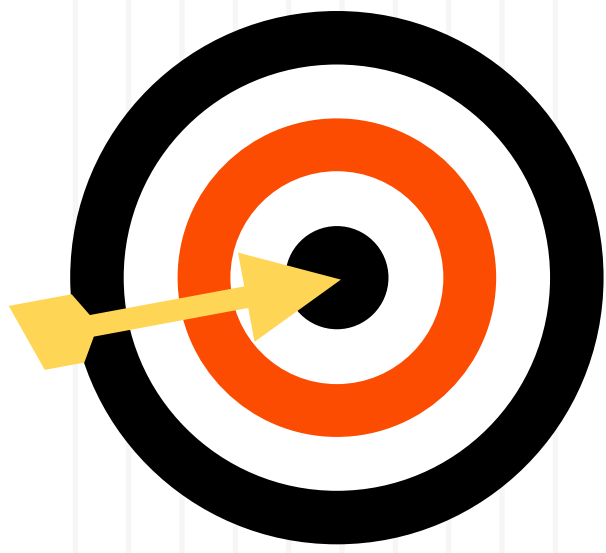
The solution was formulated based on thorough interviews with both the team members and the project manager, which helped pinpoint the root causes of the issues.

How

The Professional Development Plan was delivered through a series of structured training sessions focusing on:

- **Communication Skills:** Lessons were designed to improve active listening, timely updates, and the ability to ask clear and effective questions, thereby enhancing collaboration with clients and peers.
- **Work Estimation Training:** Team members were trained to assess project scope and timelines more accurately, using methods like the Funnel Technique to ensure a clearer understanding of client expectations.
- **Self-Representation in a Remote Setting:** The program addressed how to present oneself professionally in virtual environments, including best practices for video meetings and building rapport with remote teams.
- **Cultural Awareness and Soft Skills:** Additional coaching sessions helped the team better understand and navigate cultural differences, which significantly improved communication and relationships with the SaaS company's team.

Regular check-ins and hands-on support were provided throughout the program, ensuring the team members were consistently progressing and applying what they had learned to real-world challenges.



Results

These were some of the positive changes that took place during and after the PDP training.



Client Satisfaction

NPS Score: 4/10 → 10/10



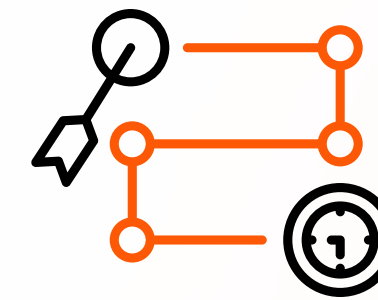
Improved Client Relationship

From a strained relationship, the two companies hosted a joint gala event in Boston, USA, during an industry meet.



Qualitative Impact

Team members demonstrated proactive communication in the project which led to smoother collaboration across all project phases.



Project Timeliness

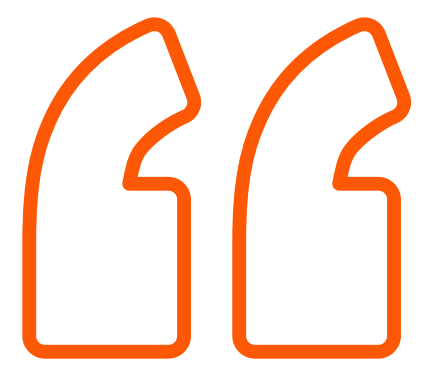
No further delays, productivity up 35%.

15% potential cost overruns avoided.



Retention and Team Morale

Zero team attrition post-training for up to 2 years. The team members reported feeling more “confident in their role.”



"The team's ability to collaborate with different stakeholders and team members, and also keeping up with the pace of the project improved dramatically. Our clients were also visibly happy with the change."



Project Manager