

Case Study: Empowering Stride's Operational Excellence

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CORPORATE OVERVIEW



OVERVIEW

Stride, a dynamic startup in the professional training and coaching industry, faced significant challenges in optimizing their sales and coaching processes to enhance productivity and customer satisfaction. They were dealing with inefficient processes, lack of standardized procedures, and inconsistent client engagement. The absence of a comprehensive framework starting from Consideration, to Purchase, to Retention, to Advocacy hindered their ability to deliver a consistent 'wow' experience for prospects, clients, and coaching partners alike.

Their aim? To streamline operations, create standardized procedures, and build a robust customer experience framework from the top down that ensured operational excellence, high client satisfaction, and increased their ability to close more deals and increase revenue.

CLIENT BACKGROUND

Company: Stride, Inc

Size: 17 employees

Founded: 2019

Location: Chicago, IL, USA

Industry: SaaS, Professional Training and Coaching, Employee Experience, HR Support

About: Stride bridges the gap between employers and employees by providing a modern solution to employee development. Their stage-appropriate development paths offer curated learning delivered via micro-content, e-learning nuggets, self-assessments, and ongoing nudges that teach the foundational concepts necessary for employees to succeed in the modern workplace.

Learn More at: <https://www.strideapp.co/>

CONSULTING FUN FACTS

Direct Client: Justin Cardillo, CEO

Package: CUSTOMIZER PACKAGE - Contractor

Consulting Type:

- 1. Contractor**
 - 25 hours/week
 - Head of Operations - Fractional Leader
- 2. Strategic Focus:**
 - Revenue Operations - SOPs
 - Customer Success Operations - SOPs
 - Partner Operations - SOPs
 - Customer Advocacy
 - Training & Enablement

Engagement Term: 4 months

C.S.A.T Categories:

- 80% of Charter
- 40% of Analytics
- 40% of Talent



Dana worked on various projects over a 4–5-month period, where she acted essentially as a Fractional COO. We were dealing with inefficiencies across the business, like every startup, from lack of standard procedures, inconsistent client engagements, just everything.

Dana came in, created standard SOPs across the business. She helped build a really robust sales pipeline, a sales process, a client success process, a partnership process, which really helped us just move faster and get more done. Overall, she was just a really fantastic partner!

Justin Cardillo, CEO,
Stride,

Challenge

Stride encountered several hurdles in both their sales and coaching operations. Key challenges included:

- **Inefficiencies in Coach Onboarding and Management:** Stride's onboarding process lacked structure, leading to inconsistent training and performance among coaches. There was no accountability or follow-up to ensure that coaches adhered to the required steps during and after onboarding.
- **High Administrative Costs:** Coaches, paid at a high rate, were performing administrative tasks due to the lack of dedicated administrative support, straining resources and increasing operational costs.
- **Inconsistent Client Engagement:** The absence of a clear customer journey and structured engagement processes led to inconsistent client experiences and poor survey results. Stride struggled with low survey response rates and lacked mechanisms to gather actionable feedback.
- **Limited Visibility and Reporting:** There was insufficient visibility into coach activities and client outcomes, making it difficult to measure effectiveness and make data-driven improvements.
- **Ad Hoc Documentation and SOPs:** Existing documentation and SOPs were fragmented and lacked formal structure, resulting in inefficiencies and a lack of standardized processes across the organization.

Addressing these issues was critical to improving operational efficiency, enhancing client satisfaction, and preparing for future growth and scalability.

Solution

Our approach involved a thorough assessment and overhaul of Stride's existing processes. We initiated the project by conducting a detailed discovery and needs assessment phase, followed by the creation of a robust Buyer, Coaching Partner, and Customer Journey and Lifecycle Activities.

We mapped and created deliverables to streamline their SOPs for sales, customers, and coaching partner operations. Key steps included:

- Developing a comprehensive project plan with short-term and long-term objectives.
- Implementing clear KPIs and SOPs for updated sales, customer and coaching partner processes.
- Introducing a 6-stage buyer journey and lifecycle framework to enhance engagement.
- Introducing a 5-stage coaching partner journey and lifecycle framework to enhance the coaches' and end users' experience.
- Introducing a 2-stage customer journey and lifecycle framework to provide a standardized and exceptional customer experience.
- Creating buyer email templates, a templated contract, and a client engagement process.
- Designing detailed SOPs and metrics for coach management, including onboarding, ongoing training, and session logging.
- Establishing a 360-degree communication strategy to ensure cohesive interaction between coaches and clients.
- Enhancing survey processes to improve response rates and actionable feedback.

Results:

Stride achieved significant improvements in operational efficiency and customer satisfaction. The revamped processes led to a notable increase in survey completion rates and enhanced feedback quality. The implementation of standardized SOPs and clear KPIs enabled better tracking of coach activities and client outcomes, leading to higher retention rates and improved client engagement. Additionally, the introduction of the 6-stage buyer journey streamlined the sales process, resulting in increased revenue and customer loyalty.

Results

1. C.S.A.T. Growth-Engine Indicators:

- **Revenue:** 1.5X increase in revenue
- **Expansio:** 15% Increase in CSQs (CS Qualified Leads)
- **CLTV:** 20% Increase in Customer Lifetime Value
- **CAC:** 10% reduction in customer acquisition costs
- **Efficiency:** 40% Increase in Operational Efficiency

2. Customer Success Growth Indicators:

- **Advocacy:** 4X increase in Customer Advocacy activities
- **Adoption:** 25% Increase in Product Adoption
- **Onboarding:** 35% Reduction in Onboarding Time

3. Other Growth Indicators:

- **Sales Velocity:** 20% increase
- **Lead-to-Customer-Conversion Rate:** 25% Increase

Custom Deliverables

Close to 100 new assets were created.

- Comprehensive project plan with short-term and long-term objectives.
- Revamped customer journey and lifecycle framework.
- Clear KPIs and SOPs for sales and coaching processes.
- Buyer engagement email templates and templated contracts.
- Detailed SOPs for coach onboarding, ongoing management, and training.
- Enhanced survey mechanisms and reporting processes.
- 360-degree communication strategy for cohesive client-coach interactions.

Through our strategic guidance and tailored solutions, Stride successfully transformed their operational processes, laying a solid foundation for sustained growth and excellence in the professional training and coaching industry.