

CASE STUDY

Transforming Executive Coaching Operations with AI-Powered Workflow Automation

THE CHALLENGE

A leading executive coaching agency faced operational bottlenecks across discovery calls, client follow-up, and coach assignments. Key processes relied heavily on manual data entry across multiple systems, resulting in:

- Inconsistent client communications
- Limited scalability beyond a single process owner
- Delayed follow-ups and inefficient workflows

As demand grew, they needed to streamline operations while maintaining its high-touch, personalized client experience.

THE SOLUTION

PMsquare designed and implemented an AI-powered solution using IBM watsonx Orchestrate and Anthropic Claude, creating a comprehensive automation system that handles end-to-end discovery call workflows. Key capabilities include:

1. Automated Summarization

Discovery call documents are ingested and transformed into structured BLUF (Bottom Line Up Front) summaries with actionable next steps

2. Seamless HubSpot Integration

Tasks, notes, and coach assignments are automatically created and updated in HubSpot, eliminating manual data entry

3. Intelligent Email Automation

Proposal, follow-up, and opportunity emails are drafted and logged automatically, improving consistency and reducing administrative effort

4. Smart Coach Matching

The system recommends coaches based on client needs and personalizes outreach accordingly

THE RESULTS

- **Operational efficiency**
Manual effort in workflows reduced significantly
- **Response time**
Time-to-follow-up after calls shortened dramatically
- **Quality and consistency**
Client communications became more standardized
- **Scalability**
Can now support multi-threading and scale operations
- **Process standardization**
Coach selection workflows became uniform and repeatable

LOOKING FORWARD

Building on the pilot's success, the team has identified a natural Phase 2 roadmap focused on four key areas:

1. Automated Email Reply Logging

To improve CRM data accuracy & save administrative time

2. Prompt Tuning

To continuously refine communication output quality

3. Automated Calendar Scheduling

To eliminate manual coordination entirely

4. Custom UI "Control Center"

To deploy standardized AI-enhanced workflows across the organization

The pilot phase closed in February 2026, with all deliverables, including orchestrate agents, solution code, and comprehensive documentation—successfully transitioned to the client's technical team.

This document outlines the strategic approach behind delivering an agentic AI solution designed to streamline repetitive, high-value tasks and enhance operational efficiency across the organization. Built on an enterprise-grade AI platform, the solution transformed a successful pilot into a scalable, enterprise-ready capability. Through thoughtful implementation and clear value realization, the engagement demonstrated PMsquare's ability to deliver rapid, high-impact AI outcomes