

BetterUp

Empowering Fortune 500 Employees and Business Leaders With Professional Coaching

Challenge — Managing and Paying Hundreds of International Professional Coaches

With hundreds of professional coaches based around the world providing an array of coaching activities to executives at Fortune 1000 companies, BetterUp found it difficult to manage its growing community of expert coaches. As its community of coaches grew, BetterUp found it challenging to keep track of every coach's unique skillset, qualifications, language(s), and expertise — all of which are needed in order to match them with the best clients, who often request coaches with specific skills or speak certain languages. Prior to Shortlist, BetterUp's coach operations team kept an ever-growing spreadsheet that recorded the information of each coach in a way that was not easily searchable or manageable — and impossible to keep up-to-date — making it difficult to make matches at scale over time.

Additionally, BetterUp found the payroll process for hundreds of globally-distributed coaches very difficult; the operations team had to manually build an activity report for every coach each month, send it to confirm accuracy, wait to receive it back, and then send individual payments via PayPal. *"The whole process took two to three days — at least,"* said Anisha Suterwala, Strategic Ops Senior Analyst at BetterUp. The lengthy manual payroll

About BetterUp



Founded in 2013, BetterUp pairs employees with a dedicated, expert coach to cultivate the leadership behaviors they need to thrive. Its mobile-first platform facilitates convenient, frequent touch points and continuous learning to prepare rising leaders for new challenges. Its innovative approach fast tracks leadership development and helps employees at all levels in their organization find more meaning and satisfaction in their roles to do their best work. Created by a team of behavioral scientists, researchers, and technologists, BetterUp's Behavioral Insights uses data from regular assessments to give companies critical insights into workforce development and measurable results across 25 key leadership dimensions. With a diverse range of customers including LinkedIn, Genentech and Logitech, BetterUp inspires employees to build the skills to thrive personally and professionally.

process meant that the BetterUp operations team wasn't able to focus as much time on higher-value activities like providing individualized support to coaches and ensuring client satisfaction.

Solution — Shortlist Creates Coach Database and Cuts Payroll From 3 Days to 3 Hours

With Shortlist, BetterUp was able to create a database of its entire community of coaches, who are able to enter in their professional experience, certifications, and language abilities, creating a more holistic and accurate profile for every coach. This database of profiles, which can be updated by coaches at any time, enables BetterUp to easily and immediately find the best coach for a client based on the criteria of their choosing. *"It's very important for us to ensure a good fit between the program and the coach, based on matching the unique needs of the client with the skills and qualifications of our coaches,"* said Suterwala. *"Shortlist makes this incredibly easy."*

Paying coaches with Shortlist also became significantly less time and resource-intensive by streamlining activity tracking, invoicing, and payments — and dramatically reducing the amount of time the BetterUp team spends conducting payroll. *"Before Shortlist, we needed to do all the payments manually; with Shortlist everything is captured in the Shortlist platform and is automatically sent out on a regular cadence. It's super smooth, super quick, and takes about three hours now whereas it used to take about three days,"* said Suterwala.

Results — Time Gained Means Better Service and Support

"With the time we've gained back, we're able to build out more of our platform, including our dashboard and running the performance analysis that helps us improve," said Suterwala.

"Getting bogged down in payment processing hindered our ability to give our broad community of coaches the individualized support and personalized assistance they need to succeed. I'm now free and able to support our coaches. Not having that 3-day payroll process hanging over our heads at the end of every month is very helpful," said Malaika Drebin, Senior Coach Community Manager at BetterUp

BetterUp coaches also noticed an improvement over the previous process. *"What I've heard from coaches is that it's very seamless and it's makes a lot of sense for them to use. And since we now have the ability to easily keep track of their unique qualifications, expertise, certifications, and more, we have a more complete picture of every coach and are better able to match them to the perfect clients, which makes them happy."*

"The final piece of the puzzle is Shortlist's incredible support. Any question a coach has about the platform or payments has been answered immediately, so I have full faith that Shortlist is as committed to supporting our coaches and ensuring their success as we are," Drebin added.

Get in touch to find out what we can do for you



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