

Shakespeare Squared streamlines processes, improves communication, increases profitability with CRM solution from IBM and Catwalk Consulting



A growth rate of more than 800 percent in its first three years is a remarkable accomplishment for any young company – and that’s exactly what Shakespeare Squared experienced after its inception in 2003.

A full-service educational company, Shakespeare Squared creates textbooks, lesson plans and Web sites for textbook and trade book publishers. It is now a multi-million dollar company with 30 full-time employees at its headquarters in Glenview, Illinois, and a network of more than 500 freelance writers, editors and educators.

But even success can have a downside. As quickly as its business increased, Shakespeare Squared began to outgrow the mostly manual processes it used to track and manage projects, writers and assets.

Using a cumbersome mix of Microsoft® Exchange, SharePoint® and Excel® applications, employees were spending an inordinate amount of time working on bid processing and managing projects and documentation. Communications were falling through

the cracks, and Shakespeare Squared was in danger of having more business than it could handle.

Kim Kleeman, president and chief executive officer of Shakespeare Squared, said her management team was “screaming for a more automated, integrated process.”

In January 2008, after a year of researching more efficient, effective ways to handle its business, Shakespeare Square decided on a customer relationship management (CRM) solution from IBM and Catwalk Consulting, an Advanced IBM Business Partner.

It was the only proposal that met the diverse set of requirements. Powered by IBM Lotus® Notes®/Domino® 8.0 collaboration software, the solution included an IBM System x™ 3650 server with DB2® Universal Database™. The core Catwalk CRM solution was enhanced with custom modules for contact, bid and project management, along with a writer resume tracking system developed specifically for Shakespeare Squared.

IBM Business Partner: Catwalk Consulting

Catwalk Consulting provides management consulting, project planning, business systems analysis, application development and training to help small and medium-sized customers bridge the gaps between their business and technology needs. Catwalk is headquartered in Schaumburg, Illinois.



Kleeman said the security of the IBM platform and its ability to combine personal computers and Macintosh workstations across a vast network of remote workers, along with flexible payment options provided through IBM Global Financing, helped seal the deal.

Catwalk listened

Angelika Coghlan, president and managing partner of Catwalk, founded her company on the premise

“Shakespeare Squared would not have been able to take on any new clients or new projects without the implementation of this solution.”

Kim Kleeman,
president and CEO,
Shakespeare Squared

that technology consulting should be one of human interaction, not a one-size-fits-all process. Kleeman was particularly impressed with how the Catwalk account team took the time to truly listen to her and her staff as they described the challenges and goals.

“They examined each of our processes to gain a thorough understanding of what we were doing and what we wanted to achieve. With their help, we were able to identify what was working, and what wasn’t to streamline our processes,” Kleeman said.

Immediate improvements

The solution was fully implemented in July 2008 and, with training provided by Catwalk, Shakespeare Squared employees came quickly up to speed. “The improvements for our business were immediate and substantial,” Kleeman said. “Shakespeare Squared would not have been able to take on any new clients or new projects without the implementation of this solution,” she noted.

Where different groups on the same project once worked separately, information now flows seamlessly and securely to all. Anyone with granted authority can access current information and check the status of each aspect of a project at any time.

This is especially important for the finance department, which needed checkpoint capabilities to support billing procedures that begin when projects are 25 to 50 percent completed. The system also allows adjustments to be made along the way, instead of waiting until the end of a project and looking back to see where money could have been saved.

What Kleeman described as a “needle in a haystack” method is now an organized contact management system, providing easy access not just to information about individuals, but to

the hierarchy and corporate structure of each customer. With the new writer resume system, project managers can easily identify the people who have the right skills for each project, check their availability and select alternate writers for backup.

The Catwalk bid management system simplified bidding procedures, eliminating more than a dozen steps from the previous process. Now Shakespeare Squared can track past bids, reuse pricing and other pertinent information, compensate for unknown variables and bid out projects more closely than ever before. Kleeman said that this ability has increased profitability and enabled her team to handle about 50 percent more bids than before with faster payback for their efforts.

While Shakespeare Squared’s old calendar system was confusing to the staff, communications are now greatly improved with Lotus Notes e-mail, calendar capability and Sametime instant messaging.

Co-funded marketing event yields new business

Catwalk participates in IBM PartnerWorld® Industry Networks, where it is “optimized” in the retail industry. That means that Catwalk has optimized its applications with IBM technologies, achieving success with its own solutions and other criteria.

It also means that Catwalk is eligible to use a special set of go-to-market benefits, such as the client events package, which Catwalk used to co-host live customer meetings at the IBM Innovation Center in Chicago. That’s where Catwalk and Shakespeare Squared first connected, leading to this successful implementation of the Catwalk and IBM solution.

For more information

Please contact your IBM sales representative or IBM Business Partner. Or you can visit us at: ibm.com

For more information about ISV resources from IBM PartnerWorld, visit: ibm.com/partnerworld/industrynetworks

To learn more about Catwalk Consulting, visit: catwalkconsulting.com

To learn more about Shakespeare Squared, visit: shakespearesquared.com



International Business Machines 2008
IBM Corporation
Route 100
Somers, NY 10589
U.S.A.

Printed in the United States of America
10-08
All Rights Reserved

International Business Machines Corporation, the IBM logo, ibm.com, DB2, DB2 Universal Database, Domino, Lotus, Lotus Notes, PartnerWorld and System x are trademarks or registered trademarks of IBM Corporation in the United States, other countries, or both.

Microsoft, Excel and the SharePoint are trademarks of Microsoft Corporation in the United States, other countries, or both.

Other company, product and service names may be trademarks or service marks of others.

IBM hardware products are manufactured from new parts or new and used parts. In some cases, the hardware product may not be new and may have been previously installed. Regardless, our warranty terms apply.

References in this publication to IBM products or services do not imply that IBM intends to make them available in all countries in which IBM operates.

The information in this document concerning non-IBM products was obtained from the suppliers of those products or from their published announcements. IBM has not tested those products and cannot confirm the accuracy of the performance, compatibility or any other claims related to non-IBM products. Questions on the capabilities of non-IBM products should be addressed to the suppliers of those products.

IBM provides information technology products and services. In no event shall IBM’s provision of products or services constitute legal advice and IBM does not represent or warrant that its services or products will guarantee or ensure compliance with any law. IBM’s customer is solely responsible for identifying, interpreting and ensuring its compliance with applicable federal, state and local laws, and regulations and rules relevant to its business and should seek competent legal advice as necessary. Printed in the United States on recycled paper containing 10% recovered post-consumer fiber.