The Change Management Pocket Guide
Case Study #1 – Customer "One-Stop Shop"

The Situation:

One of the largest beverage manufacturers in the world had developed and purchased new brands to offer customers a broader variety of carbonated and non-carbonated beverages. They integrated new products into their core business and waited for the economies of scale to show up in bottom line savings. Business leaders were surprised when administrative and support costs went up rather than down.

The Problem:

It became clear that the customer support processes and structure that had worked with only a few brands would no longer work with a new, more complex organization. The organization, which was originally developed to have brand focused customer support, now included over 20 points of contact for each customer.

Customers were complaining, morale was low, and turnover increased. Leaders feared that customers would stop calling if the situation did not improve. In order to improve customer service and decrease turnover, the Director of Customer Service realized the need to implement a "customer focused team" concept. This would require the integration of roles from Order Management, Accounts Receivable, Collections, Marketing Funds Reimbursements, Sales Support, and others (areas that he did not "own"!)

What We Did:

Transitioning the organization to new process and customer focused ways of working required change management support. A wide variety of tools from the Change Management Pocket Guide were used to help the organization transition over 20 different contact points with customers to customer focused teams that would offer customers "one stop shopping."

Accomplishment	Pocket Guide Tool Used
Assessed the organization's readiness for the change and the cultural factors that would impact the success of the effort	1. Change readiness audit
Identified and engaged the employees and managers most impacted (order management, accounts receivable, collections, marketing funds reimbursements, sales support, others)	2. Stakeholder analysis 3. Commitment assessment
Helped leaders advocate for the change	4. Leadership alignment assessment 5. Leadership involvement plan
Communicated to employees and customers about the changes that would be taking place. Instituted a "hotline" for questions, produced a monthly newsletter, and arranged "get to know your customer service representative" letters and customer visits	6. Communication plan
Half of mid-level management positions would be eliminated (less decision making responsibilities at the manager level resulted in needing less managers). Managers were given the option of choosing early retirement packages or moving to a new location or sister company.	7. Workforce transition plan
Identified training needs. Employees were initially trained on decision making, working in teams and conflict resolution. Managers were trained on coaching skills.	8. Training needs assessment 9. Systems and structures action plan
Developed plans to share information across the members of each role so that each person's expertise was shared with others	10. Knowledge sharing agreement
Clarified how responsibilities would be shared amongst team members	11. Roles and responsibilities template
Employee job descriptions were changed to reflect their new responsibilities	12. Implementation checklist
Performance evaluations changed to include peer evaluations and gain sharing was started (sales increases and improved compliance to payment terms would result in 2% of increases/net gains going to the team members)	13. Rewards and measures alignment template
Recruiting requirements were changed to require experience working with teams	14. Systems and structures action plan
After the teams were in place for 6 months, focus group meetings were held to assess progress	15. Change integration checklist 16. HR measures questionnaire