

Financial Services Organization – Change Management Plan for Career Planning Tool Implementation

Business Problem

A financial services organization sought assistance from Eagle Hill in developing a comprehensive Change Management Plan to support the implementation and rollout of a Career Planning Tool. The tool was intended to build upon a new organizational framework and provide the following benefits:

1. Enable all employees to identify available internal and external training courses as well as view job responsibilities and associated skill requirements
2. Incorporate new career levels and vernacular associated with the transition to the new organizational framework into a single tool
3. Integrate existing career-planning tools (e.g. employee reviews) with the new tool
4. Provide employees with more control and information related to career planning and development opportunities

To address these issues, the organization contracted with Eagle Hill to perform the following tasks:

- Analyze the Career Planning Tool to identify change management needs for implementation
- Solicit feedback from key client stakeholders to understand expectations of the new tool
- In less than one month, develop a Change Management Plan that the client can utilize to immediately implement and rollout the Career Planning Tool

Approach (Solution)

To support the implementation of the Career Planning Tool, Eagle Hill developed a four-phased approach for creating a comprehensive Change Management Plan that was actionable and would meet the aggressive timeline required by the client without compromising overall quality and effectiveness.

- **Review Project Materials & Develop Project Plan.** Identified and reviewed the key project materials for the Career Planning Tool, including functionality, display, and access requirements. Based on these materials, the team developed a project plan to gather and analyze information from key employees that would serve as input to the Change Management Plan.
- **Conduct Stakeholder Interviews.** Eagle Hill identified and conducted interviews with key stakeholders and employees across the organization that had exposure to or knowledge of the Career Planning Tool to determine their level of understanding and expectations.
- **Develop Draft Change Management Plan.** Using the data gathering from the project materials and interview with key stakeholders, Eagle Hill then developed a draft Change Management Plan that accounted for and mitigate the gap between employee expectations and what the Career Planning Tool would actually deliver. Through this, the team sought to develop a roll-out strategy and approach that would provide quick and immediate benefits to employees while also reassuring them that the Career Planning Tool would receive substantial improvements following the initial rollout.
- **Review & Finalize Change Management Plan.** The draft Change Management Plan was then reviewed with the key client stakeholders, updated based on stakeholder feedback, finalized, and approved for implementation.

Throughout the project, to ensure client feedback was incorporated in the solution, Eagle Hill worked closely with key decision-makers (Sr. Vice President for Operations, HR, and Corporate Communications) and conducted weekly strategy sessions to discuss the project activities, key findings, and brainstorm potential solutions.

Results Achieved

- Delivered a comprehensive Change Management Plan that provided a multi-phased approach to implementing, communicating, and building support for the Career Planning Tool
- Supported the client's Corporate Communications department with design and development of a comprehensive Communications Plan as a supplement to the Change Management Plan
- Delivered the complete Change Management Plan to the Sr. Vice President in charge of the organization. The plan was full supported and adopted for use by the organization in implementing the Career Planning Tool