



THE
DUKE MBA
CONSULTING CLUB

Case #11

Company: Deloitte

Topic: Human Capital

Industry: Financial Services

About the Case

This is a Human Capital Case and thus contains an approach much different from the usual "Strategy" case. However the candidate should not abandon the use of a framework. Here the focus isn't so much on the bottom line as it is on the approach needed to manage the proposed changes in the organization. The case should be carried out in a conversational format with hints and clues to push the candidate along.

Defining the Problem

A major U.S. financial services company has just implemented a Client Relationship Management (CRM) system. The goal: To give leadership a real time view into the organization's sales channel. For years, sales teams have maintained client sales information in separate excel spreadsheets. This prevented leadership from having visibility into and a holistic view of sales opportunities, which meant sending multiple requests to sales teams for the latest and greatest information. By the end of fiscal year, all sales teams are expected to migrate their sales data onto this new system, and use it to manage all sales information.

Prompt #1

You are the change management lead for this project. How would you get everyone on the system? Who are the various stakeholders? How would you communicate to these stakeholders?

Answer:

- Definition of Stakeholders: Leadership, Sales teams, and the rest of the organization
- Find out how people in organization like to receive communications
- Identify a change champion (leads one-on-one sessions)
- Technical support/training: how to contact the help desk
- Create a central place for feedback/comments
- Create honest communications (share both the bad and the good)

- Generate excitement/ engagement through a fun and well- branded communications campaign (all communications/ marketing should use this brand/identity)
- CEO Webcast (announcing the change initiative)

Prompt #2

After the candidate has laid out his/her plan proceed with the following question.

Do you see any other change issues? How would you address them?

Answer:

- Training (web based and classroom based) for sales team and technical support
- Design and implement incentives/ tie to Performance Management
- Create success metrics

Prompt #3

At the end of the case pose these questions to further test the candidate's acumen in dealing with change management.

How do you measure success?

What do you do if leadership digs in their heels and resists the change?

Now, let's change things up. Say the system was implemented - without the help of change management - and it failed (i.e., the people have not adopted the new technology). The team brings you on to salvage the project. What would you do?

Author's Commentary/Notes

The candidate should touch on the major points in order to consider the interview a success.