

Landen Consulting Case Study: Information Design ("Change Management Dashboard")

The Challenge:

The client was implementing an important initiative: the company's first wide-scale CRM (Customer Relationship Management) system was being deployed to the frontline sales force. The system was first being delivered to a limited pilot audience, and would then be deployed to the entire country. To support the change-management aspects of the project, field managers and trainers were spending time onsite at each sales location to help support users in adapting their daily business processes to take advantage of the new CRM information.

However, due to the dispersed geographic location of the pilot users, coupled with other resource considerations, field management would only be able to directly support a portion of the total pilot user group – the client quickly realized that the initiative needed additional information support to help the management team allocate scarce resources.

In addition, it became clear early in the deployment that system performance issues were affecting users' ability to consistently utilize the CRM system – the change management and process-integration efforts were being significantly hampered by the negative 'buzz' coming in from the field. However, management did not have a coherent on-the-ground picture of the factors affecting the field users.

The challenge: Develop a Management Dashboard (and automated reporting interface) to give the CRM management team an integrated view of system utilization metrics, business-process metrics, and system performance metrics to provide them with the tools needed to increase user adoption for the CRM system implementation.

The Solution:

- First, we analyzed the key aspects of business performance being expected from the new CRM system and defined key business processes and measurement targets. We then identified the system processes that correlated to these business metrics and established the measurement approach. Then, to address the system performance concerns, we established measurement ranges for the different levels of system performance and established measurement techniques, benchmarks & targets.
- Next, we examined the organizational hierarchy and accountability relationships, as well as the likely management conversations and approach, to establish the reporting perspective that would best enable field managers to identify and understand the activities occurring with their users.
- Armed with the above analysis, we created a robust reporting system that included rollup views that allowed management to identify "red-flag" opportunities, as well as detailed drill-down reports which provided a comprehensive picture of the business performance and system performance of a particular sales location.

The Results:

- For the initial pilot, the change management support team was provided with a robust reporting suite – our consultants delivered a set of dynamically-programmed Excel workbooks which allowed field managers to view customized graphing and charting on their laptops while visiting each user location.
- The reporting suite was such a success that Landen Consulting was retained to scale the solution upward to support the countrywide rollout: While the Excel-based solution provided a quick time-to-market and portability for the initial pilot, this solution was not designed to be scalable. To support the countrywide rollout, we served as the requirements lead and primary liaison between the business team and client’s in-house technical team to transform the reporting interface from a small localized solution to a robust, scalable, long-term business tool. We developed & documented the business requirements; designed the report layouts & GUI/interface; and performed usability testing, data validation, and acceptance testing.
- The new reporting dashboard (“Performance and Reliability Reports Suite”) has become an essential business tool used to support user-adoption conversations.

For More Information:

For more information on the services available from Landen Consulting, call us at 847.604.8697, or visit us at www.landenconsulting.com.