



Case Study: *Reviewing a multi-million dollar change process*
Client: *Global Credit-Risk Insurer*

The situation

This group was made up of 6,000 highly skilled credit risk analysts and loss adjusters from a range of legacy companies that were brought together under one brand. But with no shared IT platforms, global policies and processes, full integration was proving challenging. A major change initiative that was designed and developed by one of the worlds top strategies houses was being implemented but with mixed results. Agents2Change were asked to do a comprehensive review of the process, alignment and the results achieved.

The task

“There is a tension between a growing Group Centre and the regions – we need to ensure that the Change is collaborative and does not disenfranchise our people” EVP Operations

The task was to consult with the regional leadership teams across 5 global regions and survey their teams. The research was conducted in a very limited time-frame, and reached 450 managers in over 26 countries. The findings and the discussion were extensive and led to some practical recommendations to improve the transformation process.

The Process

Designing a Survey Tool with Global Reach

Given the time challenges and the diverse group, the best tool employed was an online survey tool that was mirrored in an interview framework to capture the views of senior leaders. The tool was designed as measurable and indicative data points that could be analysed numerically and bring factual and clear reports back to the Board of Directors

In-Depth Interviews

Survey data is essential to get a picture of key trends and issues within an organisation, but on its own it has limited value. The interviews allowed for a much more detailed conversation with regional leadership teams and helped us to unearth some very important issues that would not have showed in the data alone.

Developing healthy debates about what the data was saying

If a review is provided purely on the basis of the data, without any checking out with key sponsors and leaders, it can miss out on important context and linkages within the organisation. By holding a series of senior workshops we were able to bring a much richer understanding of how the implementation was being received and more importantly how to improve the interfaces between group and regional teams.



The most important output was to develop healthy debate and dialogue across the group of the benefits and limitations of the current implementation process and the challenges and needs for multi-cultural management.

The Results

- A comprehensive and statistical valid review of transformation efforts
- A revamped and fully integrated implementation road-map
- Improved coordination between Group & Regional centres
- Board support and approval for ongoing changes

“Agents2Change helped us to review a major change initiative. They were professional, culturally sensitive and showed a good understanding of our business context,. All of their recommendations were accepted by the Board.” Head of Global Talent Management

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