



## CaseStudy

### LEADING THROUGH CHANGE: TECHNOLOGY, PEOPLE AND PROCESS

#### The Client

- Big Four Consulting and Accounting Firm (Internal Project)
- 120,000 Global Employees
- Program Duration: 2.5 years
- Budget: \$4.1 million
- Primary Contractor

#### The Program Best Practices

- Knowledge Management Application adoption tied to Incentives and Performance
- Reduction of total applications and platforms increased IT resource availability.
- The Change Management process utilized became the catalyst for an internal Change Management curriculum.
- Compliance with SEC Regulations one year prior to deadline.
- After organizational separation, reduced employee attrition by providing process, technology and organizational support.

*“Change management is always a challenge — to both the organization and the consultant. Evantec’s team minimized problems, maximized productivity, and efficiently helped the entire process move forward, especially in slashing consulting research time by nearly two-thirds.”*

Client Senior Partner

#### The Business Challenge

In the early 1990s, the SEC imposed a regulation that required consulting organizations to separate from their accounting and legal practices. This regulation, in combination with intense industry competition and on-going consolidation, prompted this organization to undertake a large-scale technology, process and organizational change initiative.

Beginning in 1998, this organization determined that to enable the impending seamless separation of its practices, it would need to implement many strategic initiatives. The program identified the need to consolidate technology platforms and applications, implement a knowledge management system, initiate practice-wide performance management systems, and streamline the processes governing all client engagements. The initiative would ensure that the business, the organization, and the process — identified as most concerning to senior management — were ready and able to weather a massive organizational shift with a minimum of disruption.

The initiative was also required to address training of management resources on technology change management, knowledge management principles, and talent development.

#### The Business, Organizational and Process Solution

A consulting team was formed to specifically address the technology, knowledge management, change management, and training objectives required to meet the business challenges. The Evantec team utilized a standard change management methodology to assess and plan for all aspects of the business, organizational, and process impacts of the initiative.

#### The Advanced Change Methodology

Evantec’s proprietary change management theory combines a company’s business objectives, organizational needs, and the culture of one’s people to:

- **Design** the right solution
- **Align** the organization
- **Ready** people for change
- **Implement** and manage the solution
- **Support** and monitor initiative success



## The Solution

As part of the 2.5 year solution, the consulting team was responsible for all aspects of:

### Technology

- Assessing the current state of technology and applications.
- Developing a recommended consolidation approach.
- Program managing the resulting technology initiative.

### Knowledge Management

- Designing and developing training and online help for the effective utilization of the knowledge management system.
- Integrating an incentive program that rewarded use and tying in with performance management.

### Change Management

- Creating and distributing assessments, tools and templates for appropriate global office organizational and process management.
- Creating and distributing communication and marketing templates for local office customization in a variety of media, including text messages, email, and hard-copy collateral.

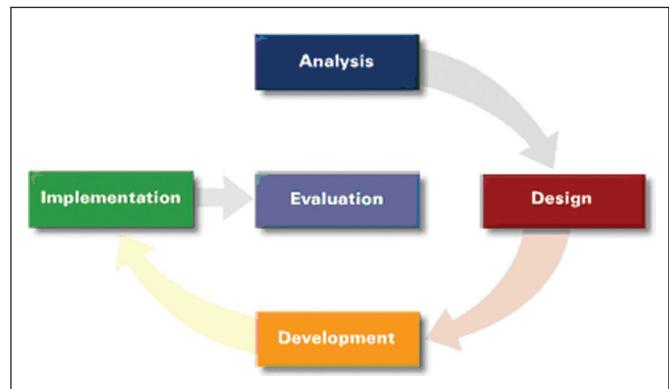
### Training and Documentation

- Developing, implementing and managing a large-scale company-wide training initiative available in self-study, quick reference, web-based and CD-ROM based training to support the implemented new processes, technology and applications.
- Supporting the program wide documentation of processes, standard operating procedures, and technical specifications.

## The Results

The program initially targeted mid-level to senior management in 160 global practice offices. Senior management was provided with a set of assessment tools, templates, training content, communications, and organizational change models to successfully implement the technology, knowledge management, and process optimization programs locally, while drawing on support and direction from the primary consulting team.

The collaborative effort resulted in the successful implementation of technology applications, a robust knowledge management application and process, a performance management system, plus optimization of processes and client management systems worldwide.



## The Key Outcomes

Key outcomes of the program included:

- Implementation of a Knowledge Management and information sharing system which reduced consultant research time by 65%, providing a knowledge library of over 30,000 titles available worldwide.
- Development of a Change Management curriculum offered throughout the Consulting practice, including titles such as: Leading Change, Technology Implementations, Knowledge Management Theory, Organizational Effectiveness, Talent Management, and Change Adoption.
- Development of a global office change toolkit providing local offices with the tools, assessments, templates, and communications they needed to successfully implement and ensure adoption of any type of change initiative.
- Post-separation retention rates were some of the lowest among competitors implementing the same regulation.

## About Evantec

Evantec provides customized consulting services to address your organization's unique, individualized needs. We utilize industry best practices, recognized methodologies, and innovative techniques grounded in over 60 years of cumulative Fortune 1000 experience.

Our practice areas include:

- Learning Solutions
- Change Management
- Communications and Branding
- Program Management
- Research, Compliance and Product Management



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