

CASE STUDY

Insurance Broker Revamps Operations with New Change Management Programme

CHALLENGE

A global insurance brokerage and risk management company engaged MBE Consulting to help implement a new Document Management System (DMS).

The client required a DMS that could track, manage and store documents, and subsequently reduce the need for paper within the organisation. It was critical for the DMS to be adaptable to meet the various needs of each business area.

To ensure the success of the new system it required employees to move away from managing and storing data in paper format, a process which was deeply ingrained. The costs and time to manage such a business practice had become unfeasible.

Consequently, alongside the implementation of the new DMS, the client asked MBE to develop and execute a Change Management Programme that incorporated a communication strategy and training programme for 400 members of staff.

APPROACH

The Change Management Programme involved:

- an early introduction to the project objective and the system.
- a detailed requirement specification and design sessions with key stakeholders.
- a rollout programme for the launch of the system with in-depth operator training.
- further coaching and mentoring once the system was implemented.

What we did:

- gained the full backing and engagement from senior management and heads of department to move to a more effective system.
- worked with end users to ensure the system was fit for purpose.
- tested the new system through a series of workshops.
- trained and coached a small group of system 'champions' within the business to provide support to colleagues.

RESULTS

- staff were involved in the project from the outset.
- streamlined training programme that ensured the success of the change management rollout.
- the effective delivery of a major business change that:
 - generated significant savings in storage space and costs.
 - enabled documents to be easily and quickly located.
 - improved document security and disaster recovery plans.
 - created company wide buy-in for future change initiatives.

AT A GLANCE

Challenges

- Employees were accustomed to storing documents in paper format
- Technological adaptation to new DMS system
- Implementing a change management programme that would be embraced by staff

Results

- Change management programme gained staff engagement
- Staff valued training programme
- Significant cost savings in storage
- Improved document accessibility and security
- Company-wide support for future initiatives



MBE Consulting played a pivotal role in improving our operations through the implementation of a new DMS. Their Change Management Programme ensured seamless transition and staff engagement from the outset. We have achieved significant cost savings, improved document accessibility and company-wide support.



Operations Manager