

# Communicating Change

Case Study

Trends such as technology and changing customer preferences prompted Scotiabank to introduce a comprehensive business strategy that would transform service delivery in its Canadian branch network. The challenge was to implement the changes quickly while causing minimal disruption to its 28,000 employees at over 1,000 branches.



## The business need

In its new customer-focused sales and service culture, Scotiabank wanted to introduce consistent sales delivery processes, new job descriptions and titles, revamped compensation policies, a web-based sales management tool, and a redesign of branch real estate. The goals were to promote and explain a new Sales & Service initiative, to engage employees in how they would fit into the change process, to foster brand positioning through communication, and to promote communication between executives and front-line employees.

## The solution

Scotiabank's Employee Communication department concluded that radical business change required an innovative communication solution. Working with Root, Scotiabank developed a series of *Learning Map*® modules along with traditional employee communication tools. By their design, the modules maximized employee involvement and two-way communication.

A cross-functional team of professional communicators and business line managers developed a communication strategy to parallel the business strategy. Each phase of implementation began with a *Learning Map*® module. Scotiabank also employed traditional communication tactics including a corporate newsletter, executive speeches, staff meetings, and an existing IVR telephone system called TeamVoice as a mechanism for employee feedback. With Root, Scotiabank produced modules that addressed the financial services industry and Scotiabank's need to change, changing customer needs, and the new sales process.

## Implementation

Phase I began with a *Learning Map*® session for all branch employees. "The kick-off meetings were a high-energy, fun opportunity to explore and discuss change in a way that was unprecedented," said Tracey M. White, Senior Manager, Employee Communication. "The approach captured employees' attention, signaling the importance of this change." Phase II focused on implementation of the new sales process. Bank branch employees experienced the modules about customers and strategy during this phase.

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"The modules helped to clarify Scotiabank's position in competing with other financial institutions. It also helped us to understand our role in meeting Scotiabank's objectives."

— Scotiabank  
Senior Leader



