

One Picture Really Does Equal a Thousand Words

When BBVA Compass, a Sunbelt-based financial institution that operates more than 700 branches across seven states, embarked on an aggressive transformation of its technology platform, they needed a communications plan to gain support from its 12,000 employees.

The business need

A large part of the company's five-year strategic plan, Leap to the Future, entailed transforming its entire technology platform. This change would, of course, affect all employees in a big way. The Office of Change Management asked Internal Communications to help support the effort.

Ralph Evans, senior vice president and director of organizational communications, said, "As we put our communication strategy together, one key component was to create context – why we were doing this, how it would happen, what needs we were trying to meet, and when it would begin and end. As is typical with projects of this magnitude, the most difficult part was getting started. As we considered how best to deliver the message across the organization, we decided to create a change map, using visuals to tell our story. So, initially, we decided to look for someone to 'paint the picture' for us, and we would take it from there."

The solution

However, when Evans and Carolina Hatley, Change Management Team Lead, discussed the issue with Root, they saw that we could do much more than that. "When we evaluated Root against other companies who could provide us with only illustration support, we saw the added value," said Evans. "With Root's help, we conducted a needs assessment and brainstormed with stakeholders. This proved to be invaluable in developing a tool that was useful even beyond the context phase."

Ultimately, the team was preparing to conduct detailed conversations in business units that would be most impacted by the transformation. However, regardless of how deeply the change would affect employees, all 12,000 needed to see how the transformation would foundationally support the five-year strategy.

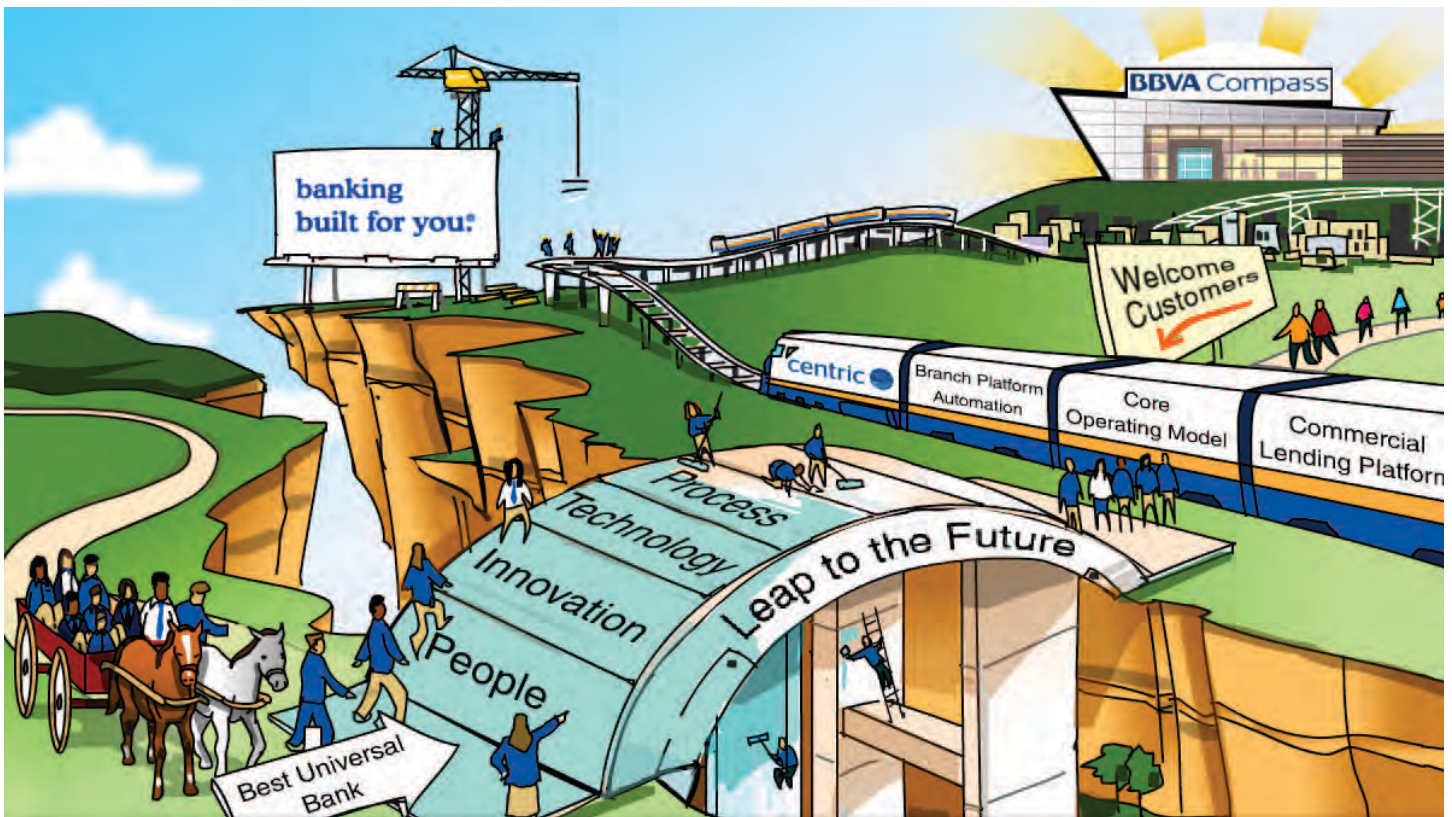
Hatley said, "Root delivered a practical toolkit that to senior leadership to help them share our story across the organization. We wanted to be sure everyone understood how the technology transformation was essential to the overall plan. The key message was why. We needed to set up the reason for the technology changes in our employees' minds so they would support and internalize it."



"From our very first conversation with Root, I knew we had stumbled upon a unique partnership. The thing that stood out the most was their ability to tap into our creativity as fuel for theirs."

— *Ralph Evans,
Senior Vice President and Director
of Organizational
Communications*





Implementation

By replacing an antiquated technology platform that employees had been disparaging for years, BBVA Compass wanted employees to realize that the transformation was an investment in not only the bank's future, but also their own. The transformation message was an opportunity to create some excitement about the new system, and the visuals were essential in doing that.

As BBVA Compass introduced the transformation, they used the visual as the mainstay to the message. Evans understood that combining visuals with words would increase retention dramatically. "We knew that if we armed senior leaders with this illustration and story, it would be easier for them to motivate employees about the changes. Then, when it was time for training, they'd know exactly why we were doing this."

"Root helped us with the initial visual, and we created a story to go with it so we could dive deep and talk specifically about what would happen," explained Hatley. "We crafted an overview presentation and chose people to deliver the message who, in most cases, were not IT employees." Instead, the story was told by the senior leaders who would reap the benefits of the new efficiencies. "Root gave us all the materials we needed to do this in an engaging way."

The presentation itself was delivered in a simple yet personalized way. Root's digital communication and learning team created an animated Flash-based presentation with illustrations and just a few words on each screen. All areas of the bank were impacted differently by the new technology. So while common visuals set the tone and showed the basics, presenters spoke from talking points on index cards that were personalized for their specific audiences. In this way, each talk was tailored to the group. And, depending on the audience and its interest or concerns, the presenter could spend more time on one or two areas of the transformation. For example, employees at branches would want to know more about how this would affect their dealings with customers directly, but didn't need to know all the specific details on how this would affect commercial lending. "This was a truly efficient way to spread our message," said Evans.

"We also sent an email teaser before each presentation to create buzz. And for those who could not attend a presentation in person, we made a self-guided electronic overview so they could experience the content at their own desks."

BBVA Compass developed this communication project in approximately four to six months. "Anyone taking on a project of this magnitude must be patient if they want to get it right," said Hatley. "We were working with lots of stakeholders, from the technology team to our lines of business, and from project managers to senior leaders." Among many other tasks, Hatley acted as an intermediary among all the various stakeholder groups, ensuring the development of a story that represented the entire team.

Results

Before deploying these presentation tools across the company, BBVA Compass created a baseline of awareness for the employees who would be undergoing the transformation training. Before the presentation, recall was at 50 percent; after, that number increased to 80 percent. This measure is a bank-wide average – numbers were even stronger in the business units that were most impacted.

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About Root

Root is a strategy execution company that helps organizations engage people as a catalyst for change using a proven framework that consistently achieves clarity, ownership, and results.

