



# **6 steps for successful change management: maximizing your trade promotion solution**



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Implementing a new trade promotion solution is a major step for any consumer packaged goods (CPG) company, to get the most out of it requires a concerted effort in change management. Below is a roadmap for a change management plan that will enable a smooth transition by keeping stakeholders engaged, informed and prepared for the changes ahead.

**Follow these 6 steps to ensure successful change management:**



**1** Get input from key user groups: sales, finance, and RGM

**2** Develop a comprehensive communication plan

**3** Ensure user-targeted, comprehensive training

**4** Document and centralize SOPs

**5** Tech support

**6** Onboarding and offboarding procedures

# 1

## Get input from key user groups: sales, finance, and RGM (revenue growth manager)

These groups play vital roles in your trade promotion operations. Their daily interactions with data, forecasts, customer management, and revenue optimization mean they have firsthand experience and valuable insights into the practical needs and potential hurdles that the new system must address.

By employing a variety of interactive methods, we can tap into the collective wisdom and diverse perspectives within these groups. This collaborative approach not only facilitates a more tailored system configuration that meets distinct operational requirements but also fosters a sense of ownership and acceptance among the users, thereby smoothing the transition phase. Potential methods include:

**Surveys:** Distribute surveys to gather quantitative data on the expectations, apprehensions, and suggestions from the primary user groups. Use this data to understand the common concerns or requests that could shape the implementation strategy.

**Round-tables:** Host round-table discussions where representatives from each user group can voice their opinions, expectations, and concerns about the new solution. This collaborative approach helps in acknowledging the collective wisdom and insights from different functional areas.

**Interviews:** Conduct one-on-one interviews with key stakeholders to dive deep into individual expectations and concerns. These interviews can provide nuanced insights that might not surface in group discussions or surveys.

# 2

## Develop a comprehensive communication plan

Implementing a new trade promotion solution necessitates a clear and engaging roadmap for everyone involved. Developing a comprehensive communication plan is crucial at this juncture. It serves as the strategic backbone, ensuring that all stakeholders are informed, aligned, and motivated throughout the change process.

Let's take a closer look at how you can execute a communication strategy that resonates across your teams and fosters an environment of clarity around the project's milestones and benefits.

**Goals and objectives:** Start by clearly outlining the goals and objectives of the new trade promotion solution. Highlight the benefits and how it aligns with the organizational strategies. Generate awareness and excitement by teasing functions and benefits through internal campaigns, emails, or intranet posts.

**Vendor use-cases:** Share success stories from other companies that have benefited from the same solution. Real-world examples can increase credibility and relatability.

**Project calendar:** Communicate the project timeline, including major milestones, training sessions, and expected go-live date, so that everyone is synced and aware of key dates.

**Key milestones:** Socialize, celebrate and communicate the achievement of significant milestones to maintain momentum and positive sentiment throughout the project.

**Post-planning focus group/recap:** Schedule sessions after the project goes live to gather feedback, assess the initial impact, and identify any areas that require further support or optimization.

### Engaging communication methods:

When it comes to impactful change, how we communicate is just as crucial as what we communicate. By finding innovative and captivating ways to convey critical information and updates, you ensure your message not only reaches your stakeholders but also resonates with them. By transforming standard notifications into interactive experiences, you can foster a more connected, informed, and enthusiastic team ready to embrace the new trade promotion solution.

**Create a newsletter:** Regular newsletters can provide updates, tips, and highlights. Feature sections like "Pro tips," "Dashboard highlights," or interviews with executives emphasizing the strategic importance and benefits of the project.

**Highlight success stories:** Share internal success stories and testimonials where the new solution has already made a positive impact. This can boost morale and encourage adoption.

**Spotlight on implementation team:** Feature stories or interviews from the implementation team members, sharing their experiences, challenges, and how they overcame them. This can humanize the process and increase trust in the project further.

# 3

## Ensure user-targeted, comprehensive training

An effective training module isn't a one-size-fits-all lecture; it's an adaptive, interactive experience that respects each user's unique role and learning curve.

The goal is clear: equip each individual with the knowledge, confidence, and skills they need to navigate the new system efficiently and effectively, thereby ensuring a smoother transition, higher productivity, and, ultimately, a stronger return on investment. How is this achieved?

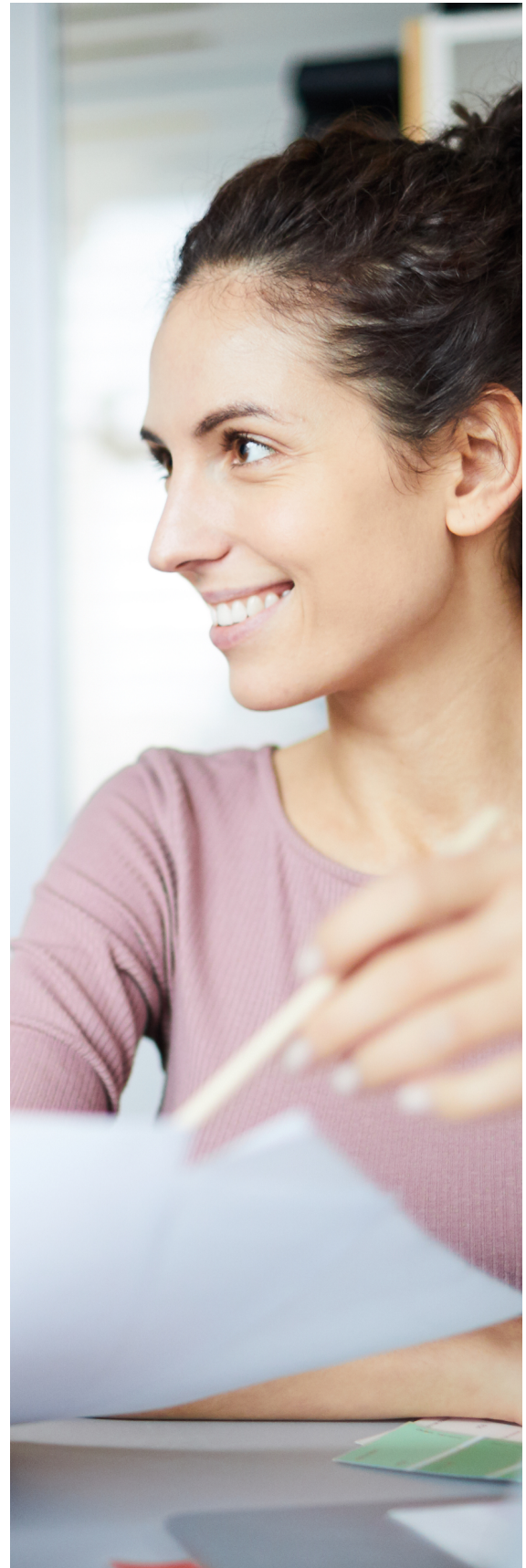
**Personalize your training:** Provide training tailored to the specific roles and needs of different user groups. Consider different learning methods, like e-learning, workshops, and hands-on sessions. Take a look at our [Guide to develop an effective TPx training program](#) for further insight on this.

**Ensure all workers are trained:** Schedule training at convenient times and consider department-specific workloads and high-activity periods. Repeat sessions to ensure everyone gets a chance to attend.

# 4

## Document and centralize SOPs (standard operating procedures)

The transition to a new trade promotion solution isn't just about adopting new technology; it's about streamlining processes to enhance efficiency and predictability across operations. This is where the documentation and centralization of standard operating procedures (SOPs) become pivotal.



By creating a centralized repository of standardized protocols, teams can navigate the complexities of new systems with confidence, leading to improved compliance, quicker onboarding, and a unified approach to managing trade promotions. The key to effective SOP production is:

**Detail:** These documents should not only be readily accessible but also serve as a definitive step-by-step guide, covering everything from the initial rollout phase to routine tasks and complex procedures within the trade promotion system.

**Relevance:** The trade promotion environment is dynamic, with systems continually evolving and expanding with new features and functionalities. It's imperative to keep these living documents updated, reflecting any system upgrades or process changes, to preserve their relevance.

**Accessibility:** Keep your live SOP document in a central location where the user community can always access the latest version.

## 5

### Tech support

The significance of establishing a reliable and accessible support system to address the technical queries and challenges your users might encounter cannot be understated. Let's examine these strategies for ensuring that users feel supported and confident in their interactions with the new system.

**Set expectations:** Communicate the procedures for obtaining technical support, including contact information, hours of availability, and expected response times (SLAs).

**Escalation procedures:** Ensure users know the protocol for urgent issues and whom to escalate if problems are not resolved satisfactorily.

## 6

### Onboarding and offboarding procedures

As your organization evolves, so too does your team composition. A clear onboarding process ensures new employees are equipped with the tools, access, and knowledge necessary to thrive in their roles.

Conversely, a standardized offboarding procedure safeguards company data and system integrity when team members exit. Together, these procedures sustain operational fluency, secure sensitive information, and uphold system efficacy, no matter the personnel changes your organization may face. The keys to these procedures include:

**Establish comprehensive procedures:** Develop clear, step-by-step protocols for familiarizing new employees with the trade promotion solution and a systematic process for offboarding that considers data security and system access controls. If you are operating in a train the trainer model, make sure this contact is made as new employees onboard.

**Integration into induction and exit processes:** Seamlessly embed these procedures into your company's broader induction and exit frameworks, ensuring they are intrinsic parts of the welcoming and departure phases.

**Remember:** change management is about people. The more they feel involved, informed, and prepared, the more successful the transition to your new trade promotion solution will be. By following this guide, you can ensure a smoother implementation process and quicker adoption, leading to faster realization of the benefits that prompted the change in the first place.