

Campbell and Bailyn's Boston Office: Managing the Reorganization

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"Campbell and Bailyn's Boston Office: Managing The Reorganization" by Anne Donnellon & Dun Gifford

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Case Introduction

Case Introduction
The Boston Office of Campbell and Bailyn is a sales office for a large financial services company. The office has been struggling for several years due to a combination of factors, including dissatisfaction within the sales team, customer confusion, and teamwork problems.

Part I: Problem Identification

- Dissatisfaction within Salespeople
- Customer Confusion
- Teamwork Problems

Part II: Assessment of Alternatives

- Building trust and Commitment
- Customer Support
- Financial Incentives for Employees

Part III: Recommendations

- Conclusion

Part I: Problem Identification

Motivating Employees

- Motivate employee by providing financial incentive
- Kotter's Eight Step Plan for Implementing Change

C8 Customer Confusion

Loss of Commitment
The sales team has lost its commitment to the company's goals and objectives. This is due to a combination of factors, including dissatisfaction with the company's leadership and a lack of clear communication.

Kotter's Eight Step Plan for Implementing Change

EXHIBIT 14-5 Kotter's Eight-Step Plan for Implementing Change

1. Establish a sense of urgency by creating a compelling reason for why change is needed.
2. Form a coalition with enough power to lead the change.
3. Create a new vision to chart the change and strategy for achieving the vision.
4. Communicate the vision throughout the organization.
5. Empower others to act on the vision by removing barriers to change and encouraging risk-taking and creative problem solving.
6. Plan for, create, and reward short-term "wins" that build the organization toward the new vision.
7. Consolidate improvements, assess changes, and make necessary adjustments to the new program.
8. Reinforce the change by demonstrating the relationship between new behaviors and organizational success.

Source: David A. A. Kotter, *Leading Change* (Boston: Harvard Business School Press, 1996).

Part III: Recommendations

- Main Solution: Building Trust and Commitment Building Trust:
 - Winston gives responsibility to Galusha
- Implement changes at next team meeting
- Galusha teaches the team strategies to build customer trust
- For financial incentives:
 - Provide bonus opportunities
 - Implement changes: "Thou" Plan

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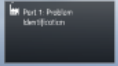
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Kotter's Eight Step Plan for Implementing Change

EXHIBIT 14-5 Kotter's Eight-Step Plan for Implementing Change

1. Take action to create urgency by creating a compelling reason for why change is needed.
2. Form a coalition with enough power to lead the change.
3. Create a vision to direct the change and strategies for achieving the vision.
4. Communicate the vision throughout the organization.
5. Empower others to act on the vision by removing barriers to change and encouraging risk taking, and a culture of taking on change.
6. Plan for, create, and reward short-term "wins" that move the organization toward the new vision.
7. Consolidate improvements, systems changes, and make necessary adjustments to the new program.
8. Reinforce the change by demonstrating the relationship between new behaviors and organizational success.

Source: Based on J. P. Kotter, *Leading Change* (Harvard Business School Press, 1996).

Part III: Recommendations

- Main Solution: Building Trust and Commitment
- Building Trust:
 - Winston gives responsibility to Callahan
 - Implement changes directly from meeting
 - Callahan teaches the team strategies to build customer trust
- For Financial Incentives:
 - Provide team opportunities
 - Implement change "Win" Plan



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Part II: Assessment of Alternatives

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- Financial Incentives for Employees



Case Introduction

Boston Office:
Ken Winston: Regional Sales Manager Boston Office
Paul Callahan: Nominal Head of KAT & Corporate High Yield Group

Changes:

- KAT (Key Account Team)
- New Performance Management System