



Case Study

Successful Integration of a Business Unit

How do you integrate a fairly independent business unit into the larger more structured operating company ensuring long term success?

In the mid 90's, my company decided to move its International Operations Department from the corporate division to a division of the operating company. The department had resided relatively independently within the corporate division for years. The decision was driven in part by opportunities for systems integration, consolidations and cost savings as well as career development opportunities for the associates.

Executives on both sides of a re-organization have critical roles. The previous executive did a superb job of initiating a smooth transition. He provided me significant amounts of information, history and perspectives regarding the department. During the first few months of the transition, he visited several sites with me. He also set up a bowling event and dinner allowing an opportunity to get acquainted for the department's key managers, supervisors, my senior executive and me a month before the transfer was official.

In addition to the commitment and support demonstrated by the previous manager, following are other key steps that helped to facilitate a smooth transition and achievement of the objectives of the re-organization.

- Initial and ongoing one-on-one meetings with each new report.
- Open and honest communications about the reasons for the change, the goals and objectives of the change and what to expect during the transition process and beyond.
- Re-assuring each leader in word and in deed that their skills, experience and participation would be essential to the success of the change.
- Tours of each unit within the department for introductions to all associates and an overview of each function.
- Initial and ongoing bi-monthly team meetings to ensure consistent and broad coverage of issues, information sharing and staying on the same page.
- Methodical and timed introduction of and training in new processes.
- Monthly dinners with a different division executive of the operating company to help the managers and key associates begin to build relationships and a growing understanding of the functions and practices of their new company.
- Encourage participation in operating company programs that educate, train and promote career advancement.

This demonstrable commitment to the people and to the acquired functions by all involved coupled with the professionalism and commitment of the department's leaders and staff made a successful integration possible. Some initial successes included:

- No undesired turnover.
- Improved service levels.
- Successful implementation of new products.
- Well laid groundwork for future systems integrations.
- Significant cost savings from a new training program developed to facilitate consolidation of four operating sites down to two, and eventually one.
- Multiple associate transfers both in and out of the division for career development and personal purposes.
- Many new friendships established!

Are you being called to lead a significant re-organization? Are you in the midst of one? If you would like a free Executive Management Assessment with me to discuss how I can help you achieve the greatest success possible, please call me or email me and we'll get clear about the best immediate next steps for the success of you and your team.

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