

CASE STUDY #5: COMMUNICATIONS STRATEGY

Field Engagement Communications Strategy & Hands-On Training for “WorkIt” Software Deployment

Executive Summary:

Field Engagement Communications Strategy & Hands-On Training for “WorkIt” Software Deployment

A large energy utility launched WorkIt, an enterprise-built mobile application designed to modernize work management across 22 field employee user groups within its Transmission & Distribution organization. Although the shift from analog to digital workflows for 3,400 field employees promised major operational and data-quality improvements, early adoption metrics revealed that traditional training models—web-based modules and classroom instruction—were insufficient for driving real engagement. Field employees required in-the-moment guidance, personalized training, and context-specific support that existing methods could not deliver.

To close this readiness gap, Program Management, Communications, Change Management, and Business Readiness teams jointly developed a new deployment model centered on district-level, hands-on field engagement. A business case proposed the creation of a dedicated Field Engagement & Training Implementation Team to provide 1:1, on-site support—challenging established rollout assumptions and requiring senior-leader sponsorship and cross-functional alignment.

A pilot was launched in a nearby district to validate the approach. Custom pre- and post-surveys captured user sentiment and measurable training impact, while communications incorporated proven behavioral-change techniques—FABs (Features, Advantages, Benefits), WIIFM (What’s In It for Me), and clear calls to action. Borrowing from external marketing playbooks, the team “sold” the deployment internally, generating excitement, camaraderie, and engagement across geographically dispersed field teams.

A real-time online information center centralized updates on scope changes, training schedules, deployment timelines, and budget implications, ensuring transparency and alignment among diverse stakeholders.

The pilot’s success secured full executive funding to scale field engagement across all districts. Deployment timelines were extended from 4–6 months to 12–18 months to enable deeper adoption, minimize resistance, and prevent collisions with other technology rollouts. This model significantly improved end-user confidence and system utilization and established a repeatable blueprint for high-touch digital transformation initiatives—strengthening both grid reliability and frontline worker safety.

Executive Presentation:

Field Engagement Communications Strategy & Hands-On Training for WorkIt Software Deployment

Context

- WorkIt mobile app introduced to 3,400 field employees in 22 field user groups as part of a major T&D modernization initiative.
- Shift from analog to digital workflows required meaningful behavior change and high-touch support.
- Early adoption metrics showed traditional web-based and instructor-led training was insufficient.

Strategic Approach

- Cross-functional teams (Program Management, Communications, Change Management, Business Readiness) identified need for a field-based engagement model.
- Proposed a dedicated Field Engagement & Training Implementation Team to deliver 1:1, on-site, hands-on support.



- Developed a comprehensive business case requiring senior-level sponsorship and a departure from established rollout plans.

Execution

- Launched a district-level pilot supported by tailored pre- and post-surveys to measure sentiment and effectiveness.
- Applied behavioral-change communication frameworks (FABs, WIIFM, clear Calls to Action) to increase relevance and adoption.
- Used external marketing techniques to “sell” the deployment internally — building momentum, camaraderie, and enthusiasm across dispersed field teams.
- Created a real-time online information hub centralizing updates on scope, timelines, training, scheduling, and budget impacts.

Outcomes & Impact

- Pilot success secured full executive funding to scale field engagement to all districts.
- Deployment timeline extended from 4–6 to 12–18 months to enable deeper adoption and reduce overlap with other tech launches.
- Significant gains in end-user confidence, system utilization, and readiness for digital workflow transformation.
- Established a repeatable, high-touch training model supporting future technology initiatives—strengthening grid reliability and frontline worker safety.

Business Use Case:

Field Engagement Communications Strategy & Hands-On Training for WorkIt Software Deployment

A major Work Management and IT modernization initiative introduced the enterprise-developed WorkIt mobile software application to 3,400 field employees across 22 geographically diverse user groups across a major energy utility’s Transmission & Distribution organization. While the transition from analog workflows to digital processes promised operational efficiency and data accuracy gains, early adoption metrics made it clear that traditional enablement methods—web-based training and classroom instruction—were failing to drive meaningful engagement. Field employees required real-time guidance, live troubleshooting, and contextualized support that existing training models could not provide.

To address this gap, the Program Management, Communications, Change Management and Business Readiness teams identified the need for a new deployment approach centered on hands-on, district-level engagement. A business case was developed proposing a dedicated Field Engagement & Training Implementation Team to provide 1:1, on-site support. This recommendation represented a bold shift from the established rollout plan, requiring senior-level trust, cross-functional partnership, and a willingness to challenge existing deployment assumptions.

The team launched a targeted pilot in a nearby district to validate the model. Customized pre- and post-surveys were designed to capture user sentiment and quantify training effectiveness. Messaging incorporated proven behavioral-change frameworks, including FABs (Features, Advantages, Benefits), WIIFM (What’s In It for Me), and clear calls to action to strengthen communication resonance and increase willingness to adopt the tool. Applying traditional external marketing techniques to “sell” the deployment to internal audiences created stakeholder buy-in, excitement and buzz that permeated across geographically diverse teams, fostering camaraderie and collaboration.

A one source online information center was developed and updated in real-time to keep diverse stakeholder groups informed of ongoing changes to project scope, training and deployment timelines, and scheduling and budgetary impacts.

The WorkIt pilot demonstrated clear value, earning full executive funding to scale field engagement across all districts. Deployment timelines were strategically extended from 4–6 months to 12–18 months, allowing deeper adoption, reduced resistance, and improved coordination with other technology rollouts. The shift not only increased end-user confidence and system utilization but also established a repeatable model for high-touch training deployments



supporting future digital transformation efforts to reinforce reliability of the energy power grid and safety of frontline workers.

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