

CASE STUDY #3: COMMUNICATIONS STRATEGY

Strategic Communications & OCM Approach High-Impact Technology Rollout

Executive Summary:

Strategic Communications & OCM Approach High-Impact Technology Rollout

A major West Coast energy and electric utility embarked on a multi-year ERP and power-grid reinforcement initiative to replace unsupported, custom-built Salesforce legacy software with a modern Microsoft Dynamics 365 Field Service (D365-FS) platform. Although frontline demand, competitive pressures, and validated business requirements consistently indicated the need for an early mobile application rollout, the implementation team initially scheduled mobile deployment for a later phase due to cost and complexity constraints.

The Organizational Change & Communications Management team identified this misalignment as both a strategic and operational risk. Working across leadership, SMEs, field representatives, and Steering Committee members, the team led a structured stakeholder engagement effort to model and communicate the operational, cultural, and financial impacts of launching the mobile solution in Phase 1 rather than Phase 2. Executive-ready messaging was developed using issue- and risk-based framing, enabling leaders to clearly see the implications of delay on workforce efficiency, customer satisfaction, system reliability, modernization goals, and long-term labor cost reductions.

When device compatibility concerns emerged, the OCM/Communications team collaborated with technical and training groups to shift to a rugged tablet web-app solution, lowering risk while maintaining functionality. Tailored communications, training, and readiness plans were prepared to support smooth adoption.

This coordinated change-leadership effort resulted in executive approval to advance the D365-FS mobile solution into Phase 1. The decision strengthened trust between office and field leadership, improved workflow efficiency, and supported recruitment and retention—particularly among newer employees who expect modern mobile tools. The initiative demonstrates the critical role of OCM in challenging assumptions, aligning stakeholders, and enabling high-impact organizational change.

Executive Presentation:

Strategic Communications & OCM Approach for High-Impact Technology Rollout

Program Context

- Multi-year, utility lead ERP and energy grid-modernization initiative replacing unsupported Salesforce legacy tools with D365-Field Service
- Mobile app identified as critical early capability for field efficiency, reliability, and workforce retention
- Initial roadmap placed mobile launch in a later phase due to cost/complexity assumptions

OCM Leadership & Communications Alignment Strategy

- Unified Steering Committee, SMEs, and field stakeholders around operational and strategic impacts
- Modeled Phase 1 vs. Phase 2 implications across workforce productivity, customer satisfaction, labor costs, and modernization goals
- Delivered clear executive-level issue/risk framing to surface consequences of delaying mobile deployment

Key Interventions

- Identified device-compatibility barriers by guiding a pivot to rugged-tablet web-app solution
- Developed targeted communications, training, and field-readiness plans

Outcome & Impact

- Executive approval secured to advance D365-FS mobile rollout into Phase 1



- Strengthened trust between office and field leadership
- Improved workflow efficiency and supported recruitment/retention of newer mobile-native workers
- Demonstrated Strategic Communications and OCM's role in challenging assumptions, mitigating risk, and enabling high-impact change

Business Use Case: **Strategic Communications & Organizational Change Management for a High-Impact Technology Rollout**

A major West-Coast energy and electric utility organization was preparing to deploy a new technology system as part of a multi-phase ERP (enterprise resource planning) power grid reinforcement capital initiative. The 3-5-year project aimed to replace dated Salesforce custom legacy software that was no longer supported with a multi-million-dollar solution - Microsoft Dynamics 365 - Field Service (D365-FS). Although frontline employees, competitive benchmarks, and operational analyses (from SAD and user-verified BRDs) all pointed to the need for a mobile application early in the program, due to cost and complexity the implementation team had scheduled the mobile component for a later phase. The prevailing assumption across leadership was that advancing the rollout was not feasible within existing priorities or budgets.

As part of the Organizational Change Management (OCM) function, our objective was to challenge this assumption and realign stakeholders around a more strategically sound and operationally expedient path. Advocates across the program supported an accelerated rollout for the mobile app but were reluctant to elevate the issue due to competing leadership and budgetary priorities and change-fatigue concerns. The OCM team was asked to unify perspectives, surface impacts, and guide the organization toward an informed decision.

To drive alignment, the OCM lead partnered with Steering Committee members, subject matter experts, and field representatives to model the operational, cultural, and financial implications of launching the mobile app in Phase 1 versus Phase 2. These insights were translated into clear, executive-ready messaging and integrated into Sponsor communications using an issue/risk framing that highlighted both the missed opportunities and the long-term consequences of delay. The team also facilitated cross-functional sessions to validate assumptions, address resistance, and build a shared narrative around customer satisfaction, employee experience, workforce retention and labor cost reductions, system reliability, and modernization goals.

When device-compatibility surfaced as a potential barrier, the OCM team coordinated with technical and training partners to pivot to a rugged tablet web-app solution that met field-use requirements while reducing rollout risk. Tailored communication and training plans were prepared to support adoption and ensure field readiness.

The result was executive approval to advance the D365-FS mobile solution into Phase 1—despite some internal debate. The decision provided immediate value to field staff building internal trust and understanding between office and field leadership, improving workflow efficiency and strengthening recruitment and retention, particularly among newer employees who expected modern mobile access. The effort demonstrated the impact of OCM in questioning assumptions, building stakeholder alignment, and enabling meaningful organizational change.

Author:
Mary Schimmelman Chief Communications Officer, IABC
Certified Organizational Change Practitioner, ACMP