

Attachment 1

Task: Fast Track Couriers Pty Ltd

It is the end of the 2011 financial year. You are an external change management consultant employed by Fast Track Couriers. You have been asked by the General Manager to develop a change management strategy and present the strategy to management for approval.

Management has identified the following high-priority change requirements:

- Goal A: Implement PDA/ GPS usage (productivity function) on truck fleet in the first quarter of the 2017 financial year.
- Goal B: Implement one person/truck policy using automatic lift gates in the first quarter of the 2017 financial year.

Achievement of these goals should increase net profit in the next financial year by \$200,000 due to increased efficiencies and increased business.

Goal A is essential to the business to ensure (in priority order):

1. Most efficient use of resources to cover market needs. Management will look at more than the raw hours spent on job and consider all factors such as job difficulty, traffic conditions in order to optimise fleet usage.
2. Job performance measurement for training needs.
3. Recognition of outstanding performance (bonuses for exceeding targets; advancement/ leadership opportunities).

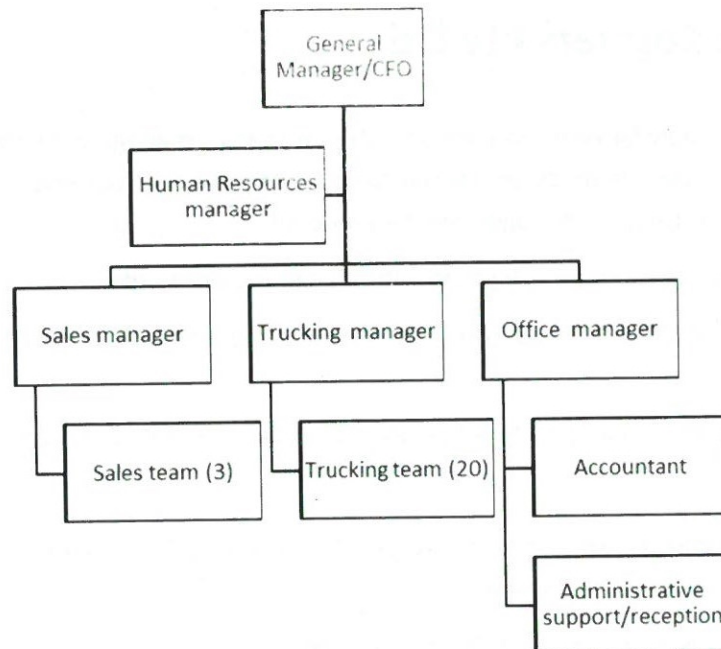
Goal B is essential to the business to ensure:

- Most efficient use of resources to cover market needs.
- Reduced need to hire external truckers; use present employees as much as possible.
- Reduced possibility of lifting injury.

The change management strategy, once approved by the General Manager, should be implemented immediately.

People/structure

Fast Track Couriers has implemented and recruited the people required to fill the roles in the following organisational structure:



Managerial duties/role description

General manager/CFO	Oversees company; approves major business decisions such as strategic goals, change management initiatives; reports to board of directors; prepares financial reports.
HR manager	Oversees and implements change management programs; collect feedback, assessment results, and all other data regarding change management; provides report to the General Manager on implementation of major changes; oversees recruitment.
Sales manager	Coordinates sales team; provides sales team training; manages performance of sales team.
Trucking /operations manager	Coordinates activities of trucking team; manages performance of trucking team; compiles productivity reports; manages operations, authorises purchasing of operational equipment etc.
Office manager	Coordinates activities of accountant and administrative support. Authorises payroll.

Resourcing/budget:

The budget for implementing the change strategy (excluding cost of new trucks, technology and lift gates, lost productivity from truckers) is \$25,000. Overruns must be approved by General Manager.

You will be employed for two weeks full-time (40 hrs/week) and 8 hours a week until end of the first quarter.

Resources:

The following resources are available for your use:

Resource	Cost	Availability
Project analyst/manager (you).	\$100/hour	Length of project, as needed
Trucking manager (Bob Rogers).	–	Length of project, as needed
Sales team member with high-level oral and written communication skills to assist new Human Resources manager (Jessica Smith).	–	Length of project, as needed
New Human Resources manager (Peggy Anderson).	–	
PDA/GPS Assessor (Jack MacDonald).	\$150/hour	Length of project, as needed
Lift gates Assessor (Erin Mitchell)	\$150/hour	Length of project, as needed
Head office training rooms equipped with training supplies for five participants.	–	2 nd week of July 2011 only.
PDA/GPS device, based at office.	–	Length of project, as needed
One new truck with tail gate based at office	–	Length of project, as needed

Other resources must be requested for approval by General Manager.

Education/ training

- Goal A: Implement PDA/ GPS usage (productivity function) on truck fleet in the first quarter of the 2017 financial year. Requires a half-day training session.

- Goal B: Implement one person/truck policy using automatic lift gates in the first quarter of the 2017 financial year. Requires a half-day training session.

Project management reporting

The General Manager would like you to report to her on a daily basis in the initial week of the project and then weekly until the end of the first quarter. The HR manager should receive a copy of this report.

Template

Fast Track Couriers policy mandates the use of the following project management template.

- Green: completed
- Amber: in progress
- Red: not completed.

Reporting element	Measures	Status
Change goal		
Project management	Delivery of project activities as per project plan for each stream	Overall status:
	- People	
	- Process	
	- Technology	
	- Structure	
Stakeholder Management	Stakeholders engaged and comfortable with current position	
Communication	Communication plan activities on schedule	
Education	Education plan activities on schedule	
Cost benefits	Project budget on track	
	Cost benefits on track to be realised	
Risk Management	Risk management plan effectively managing risk	

Background information: Fast Track Couriers Pty Ltd

About Fast Track Couriers

Fast Track Couriers is a courier company that has been operating in New South Wales for the last 15 years. Its primary business function is delivering medium to large size packages across metropolitan Sydney.

Strategic plan goals

The organisation's strategic goals are:

- To expand business in the metropolitan area so that small to medium package deliveries market share increases by 7.5%.
- To expand the business to include small and medium package deliveries to regional NSW.
- To develop an integrated approach to distribution management utilising technology such as PDA devices and GPS.
- To develop and maintain a cohesive and well-motivated workforce.

Strategic goals are supported by the following operational and human resources goals.

Operational plan goals

- Testing of the distribution management system is to cease and allow implementation within the first quarter of the 2017 financial year.
- The truck fleet will need to be expanded by 8 trucks within the 2017 financial year.
- Small distribution hubs will be positioned at Maitland, Goulburn, Nowra and Bathurst each manned by two employees within the next eighteen months.
- Fast Track Couriers will complete 20% of deliveries to regional locations in the next three years.

Human resources goals:

- To incorporate a Human Resources function to facilitate the changes in workforce management in the first quarter of the 2017 financial year.
- Introduce professional development and training to achieve organisational goals and promote understanding of organisation's strategic goals in the first quarter of the 2017 financial year.
- Eliminate industrial relations problems in the 2017 financial year. Conclude negotiations with employees and union.
- Eliminate lifting injuries.

Employee profile (pre-changes)

Fast Track Couriers employee the following people:

- General manager (GM) – Generally on the road; never in office.
- Chief financial officer (CFO) – Reports to GM and keeps office hours; 9–5, Mon–Fri.

- Accountant – Reports to CFO and keeps office hours; 9–5, Mon–Fri.
- Truck drivers (x20) – Report to office.
- Office team manager – Reports to GM and keeps office hours; 9–5, Mon–Fri.
- Office team members (x5) – Perform administrative, sales, customer relationship management duties. Monitor truck drivers and handle enquiries. Report to office team manager.

Head office employees

- Covered under individual contracts.
- Salary range \$32,000–\$75,000 annum.
- Small team of mainly female employees, ranging in age.
- Lots of opportunity to participate in learning and development programs due to management support; however little desire to participate.
- High employee engagement scores. Employees cite team work and opportunities as motivating factors affecting the business success.

Drivers

- Covered by an award.
- Salary \$45,000 per annum.
- Heavily unionised.
- Employee demographics are all male employees aged 25–65.
- Little opportunity to participate in learning and development programs due to being on the road; however, little to no interest to participate in development opportunities.
- Large number of workplace injuries due to heavy lifting.
- Low employee engagement scores. Drivers cite pay as an issue.
- Currently experiencing low turnover.
- History of industrial disputes regarding pay and previous change initiatives.

Appendices

Task: Fast Track Couriers Pty Ltd

It is the end of the 2011 financial year and one month into the implementation of a change management strategy. You are hearing that the implementation has not achieved the employee's trust, understanding and support that you expected and is essential for success, particularly among truck drivers.

You are an external change management consultant employed by Fast Track Couriers to revise the communications strategy. You have been asked by the General Manager to develop and deliver an innovative and more effective communications plan.

Following the communications plan (provided in Appendix 4), you will need to evaluate the management of truck drivers through the change management process. Develop a survey to gauge trucker opinion on the following ten dimensions of employee satisfaction:

Dimension	Description
Training	Adequate for role?
Role Clarity	Are roles and responsibilities clear?
Trust	Do employees trust the change management (CM) process and management?
Evaluation	Is performance fairly measured?
Leadership	Is leadership adequate and does it inspire confidence?
Communication	Is communication clear and two-way?
Procedures	Are there clear and effective procedures to follow?
Recognition	Is performance recognised?
Diversity	Are individual differences valued and appreciated by Fast Track Couriers?
Team work	Is team work encouraged and promoted?

Once you have completed the survey, meet with the union representative (assessor) to discuss results and get additional input.

Draft a revised communications plan to conform to the identified risks in the risk management analysis.

After you have gathered input, meet with the General Manager (assessor) to discuss your suggested revision of the communications plan.

You will then need to implement the revised plan. Part of the revised communications plan will include a 15–20 minute information session that you will deliver to the employees.

Goals

FTC has the following goals for the Change Management strategy:

- Goal A: Implement PDA/GPS usage (productivity function) on truck fleet in the first quarter of the 2017 financial year.
- Goal B: Implement one person/truck policy using automatic lift gates in the first quarter of the 2017 financial year.

Achievement of these goals should increase net profit in the next financial year by \$200,000 due to increased efficiencies and increased business.

Goal A is essential to the business to ensure (in the following order of importance):

1. Most efficient use of resources to cover market needs. Management will look at more than the raw hours spent on job and consider all factors such as job difficulty, traffic conditions in order to optimise fleet usage.
2. Job performance measurement for training needs.
3. Recognition of outstanding performance (bonuses for exceeding targets; advancement/ leadership opportunities).

Goal B is essential to the business to ensure:

- Most efficient use of resources to cover market needs.
- Reduced need to hire external truckers and use present employees as much as possible.
- Reduced possibility of lifting injury.

Progress of implementation

The project manager has prepared the following progress report:

Green: Completed

Amber: In progress

Red: Not completed

Reporting element	Measures	Status
Change goal	Goal A: Implement PDA/ GPS usage (productivity function) on truck fleet in the first quarter of the 2017 financial year.	RED
Project management	Delivery of project activities as per project plan for each stream	Overall status:
	People	GREEN
	Process	GREEN
	Technology	GREEN
	Structure.	GREEN
Stakeholder Management	Stakeholders engaged and comfortable with current position.	RED
Communication	Communication plan activities on schedule.	GREEN
Education	Education plan activities on schedule.	RED
Cost benefits	Project budget on track.	RED
	Cost benefits on track to be realised.	RED
Risk Management	Risk management plan effectively managing risk.	RED

Risk management analysis

Risk/Barriers	Impact	Likelihood	Strategies for mitigating risk
Lack of trust regarding use of productivity data. Refusal to implement.	High impact	Medium	Communications and training to outline business need. 'Tracking productivity helps improve the efficiency of operations, where and when resources are deployed; it is not a tool to performance manage or penalise individuals.' Address employee concerns.
Perceived threat to job security Resistance to implementation.	High impact	High	Explain connection between business expansion plans and: - Increased job security: because of the need for drivers to support expansion; because overall profitability and health of the business reduces risk to everyone - Benefit of training and consequent increase in employability due to new skills.
Industrial action.	High impact	Medium	Address employee concerns. Gain trust and acceptance.

Communications plan

Audience	Message (with strategic elements)	When	Communication method	Person responsible
HR manager	Change management strategy – duties of HR manager.	9 am–10am, 1 July 2017.	Email (invite with agenda). Face-to-face (office training room).	CM consultant
Trucking/operational manager	Change management strategy – duties of trucking manager.	11.30 am–12.30pm, 1 July 2017.	Email (invite with agenda). Face-to-face (office training room).	HR manager
Management team	Change management strategy– duties of HR manager.	2 pm–3 pm, 1 July 2017.	Email (invite with agenda). Face-to-face (office training room).	HR manager
Trucking team	Change management strategy impacts to trucking team. Duties of truckers – provide an explanation of what will be required. Business need – Gain support by emphasising possible negative effects on jobs if change does not happen. Training schedule – emphasise mandatory nature and threaten performance review consequences for non- compliance.	9 am–10 am, 4 July 2017.	Email	HR manager (assistant may draft)
Sales team	Change management strategy summary. Benefits to organisation.	11 am–11.30 am, 4 July 2017.	Face-to-face (office training room).	Sales manager to run team meeting

Audience	Message (with strategic elements)	When	Communication method	Person responsible
Office team: Accountant; Administrative support person	Change management strategy summary. Benefits to organisation.	11.30 am–12 pm, 4 July 2017.	Face-to-face (office training room).	Office manager to run team meeting
Truckers (All other employees to receive brief summary only)	Request for feedback.	Three weeks post-training.	Feedback survey on ten dimensions of employee satisfaction.	New CM consultant to design and implement. HR Manager to research benchmarking.

Background information: Fast Track Couriers Pty Ltd

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- To develop an integrated approach to distribution management utilising technology such as PDA devices and GPS.
- To develop and maintain a cohesive and well-motivated workforce.

Strategic goals are supported by the following operational and human resources goals.

Operational plan goals

- Testing of the distribution management system is to cease and allow implementation within the first quarter of the 2017 financial year.
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Human resources goals:

- To incorporate a Human Resources function to facilitate the changes in workforce management in the first quarter of the 2017 financial year.
- Introduce professional development and training to achieve organisational goals and promote understanding of organisation's strategic goals in the first quarter of the 2017 financial year.
- Eliminate industrial relations problems in the 2017 financial year. Conclude negotiations with employees and union.
- Eliminate lifting injuries.

Dangerous Goods Policy

Overview

The Fast Track Couriers is the underpinning foundation of our core beliefs and values which guides our decisions and actions, including Fast Track Couriers commitment to providing a safe, secure logistics service to our clients in transporting, handling and storing their products classified as dangerous goods and to provide for the safety of all employees, the community and the environment.

Scope

This policy applies to everyone who works at Fast Track Couriers in any capacity, whether full-time, part-time or casual, including temporary employees and contractors.

Principles

At Fast Track Couriers we will:

- Ensure that all activities involving dangerous goods and hazardous chemicals are administered to the highest level required by the relevant legislation and that all applicable licences and permissions are in place for our employees, contractors, sites and equipment involved.
- Supply services only to customers who recognise and operate to the strict guidelines of all relevant legislation.
- Ensure all employees and contractors engaged by Fast Track Couriers, involved in the storing, handling or transportation of dangerous goods or hazardous chemicals, are trained and provided with information, personal protective clothing and safety equipment necessary to minimise the risks associated with those products.
- Ensure contractors are checked by Fast Track Couriers for dangerous goods compliance prior to their engagement as well as on a regular ongoing basis to maintain their compliance to carry dangerous goods.
- Ensure all dangerous goods consignments are checked for compliance with relevant dangerous goods legislation prior to acceptance of the goods by Fast Track Couriers.
- Have documented procedures, checklists and review systems in place to cover all aspects of our operations involving dangerous goods.

Dangerous goods and/or hazardous chemicals restricted by legislation for storing, handling or transport will not be stored, handled or transported unless the relevant licences or permissions are in place and approval given by the relevant Fast Track Couriers Business Unit General Manager.

All suspected breaches will be investigated and appropriate disciplinary and remedial action taken. Employees who do not strictly comply with this Policy will face disciplinary action, including counselling, formal warnings and dismissal.

Background to workforce management and relations

The company communicates with employees via email for head office employees and a printed monthly newsletter for drivers. The company provides information regarding policies procedures through documented manuals that are held in each truck as an employee manual. Office-based staff can access copies of these manuals at the office.

All trucks are fitted with a GPS system to assist drivers with navigating to each pick up and drop off location. Trucks are also assigned a PDA that provides drivers with the details of each pick up and drop off and records when a job starts and finishes. The data from this device is sent back to head office to monitor job progress but is not used to complete productivity reporting. When this device was introduced, drivers were not happy as they felt the organisation was saying that it did not trust the drivers to manually record the time spent on each job. Many of the drivers also resented having to learn how to use the device and thought it was a waste of time.

Head office employees work very closely together and are a very cohesive and motivated team. They are positive about the organisation's direction and respond well to change.

Drivers have historically reacted negatively to change. Change implemented in the past has met with resistance and was therefore difficult to implement. Drivers have in the past done their best to block any changes from being implemented, even going to the lengths of threatening strike action and having the union involved to assist with resolving the issue.

Fast Track Couriers currently allocates two drivers per truck to ensure that drivers are able to load and unload heavy packages. The strategy going forward is to remove the need for having two drivers per truck by installing an automatic lift gate on the back of each gate at a cost of \$10,000 per truck. This will mean that only one driver is needed per truck as no heavy lifting will be required.

It is Fast Track Couriers' intention to use these surplus drivers to drive the new trucks that will be purchased to enable the company to extend its services to regional NSW.

Drivers are currently happy with the work environment as they enjoy working as part of a two-man team. The organisation typically leaves the drivers alone and lets them do their job as this is what seems to make them happy. Management has tried in the past to have drivers participate in organisational activities. These activities were not received positively and the drivers complained and asked not to be involved. The drivers' view is that their preferred team is their two-man driver team and they only see the benefits of that specific working arrangement. There is a high value placed on communication with trucking team members.

Appendix 6 – Survey

We are seeking your opinion on your recent organisational change effort. Your responses are confidential and will be used to identify areas that require improvement.	Strongly Agree	Agree	Slightly Agree	Neither Agree nor Disagree	Slightly Disagree	Disagree	Strongly Disagree
	1	2	3	4	5	6	7
Training – Adequate for the role	1	2	3	4	5	6	7
Role Clarity – Roles and responsibilities are clear	1	2	3	4	5	6	7
Trust – Employees trust the change management (CM) process and the management	1	2	3	4	5	6	7
Evaluation – Performance fairly measured	1	2	3	4	5	6	7
Leadership – Adequate and inspires confidence	1	2	3	4	5	6	7
Communication – Clear and two way	1	2	3	4	5	6	7
Procedures – Clear and effective	1	2	3	4	5	6	7
Recognition – Performance recognized	1	2	3	4	5	6	7
Diversity – Individual differences valued and appreciated by Fast Track Couriers	1	2	3	4	5	6	7
Team Work – Team work encouraged and promoted	1	2	3	4	5	6	7