# OCM SOLUTION

## Case Study

## Helping a Change Management Leader Deliver Better Results to Global Utility Clients



**Client:** A 20-year-old organizational change management consulting firm

**Industry:** Change Management Consulting for Utility Sector

**Solution:** OCMS Portal software for efficient reporting, stakeholder analysis, and change impact tracking

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## The Challenge: Cumbersome, Manual Reporting Slowing Down Client Services

As a trusted partner to utility organizations around the world, this seasoned consulting firm is known for delivering expert organizational change management. But as project demands increased, they faced a common challenge: their internal processes for tracking and reporting on change impacts had not kept pace.

Providing high-quality overview reports for clients had become time-consuming and fragmented. Manually compiling spreadsheets to show how change was progressing across teams and departments made it hard to deliver real-time insights. When employees shifted between roles or business units, updating those changes across all related documents created delays and risked errors.

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## The Solution: Smarter Change Impact Tracking with OCMS Portal

The firm turned to the **OCMS Portal** to centralize and streamline their change management service delivery. Our platform was tailored to help them track change data, assess stakeholder sentiment, and produce professional-quality reports quickly and easily.

**Key capabilities included:**

- **Bulk Employee Upload & Change Importing:** Simplified onboarding of large data sets for new projects.

- **Target Audience Management:** Easily update employee roles and departments in one place, with automatic updates reflected in all change assessments and reports.

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- **Dynamic Reporting Tools:** High-level summaries and detailed analytics—filtered by role, department, location, and more—available in just a few clicks.

- **Professional Presentation:** Branded, real-time reports that clients could trust for key decision-making.



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## The Results: Faster Insights, Better Client Delivery

With OCMS Portal, the firm modernized how it supports utility clients...delivering faster, clearer insights without the administrative burden.

**Key Benefits:**

- **Professional-Grade Reporting:** The team now delivers sharp, visually compelling reports that make project progress and change impacts easy to understand.

- **Real-Time Updates:** Department changes no longer require multiple manual edits; updates in the portal flow through all relevant tools and reports instantly.

- **Time Savings:** The firm reclaimed hours of staff time previously spent chasing spreadsheets and formatting custom client reports.

- **Scalability:** The firm is now better equipped to handle more client projects simultaneously, without sacrificing quality or speed.



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## 🚀 Looking Ahead: Enhanced OCM Services for a Growing Client Base

Thanks to OCMS Portal, this consulting firm has added a powerful differentiator to its OCM service offering. By eliminating time-consuming processes and ensuring data accuracy, they can now focus more on what matters: helping utility organizations navigate change successfully.

**OCM Solution continues to support the firm with ongoing feature enhancements and service alignment as they grow their global reach.**

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