

[performance]

program implementation & employee communications case history

Programmed implementation process, tools and communications enable Shell to increase efficiency and acceptance of lube-bay program rollout to over 30 countries

procedures development

Rollout Tools & Program Communications

strategic competency programs

curriculum development

marketing and customer communications

training development processes and software

behavioral safety analysis software and safety communications programs

Local acceptance and implementation important to high-profile program

Shell saw the opportunity to increase global lubricants sales by delivering a new fast-lube format to retail locations with under-utilized service bays. Because each location manager had the ability to opt out, both the attractiveness of the consumer offering and the ease of implementation would be critical to program success.

Daniel Follette, Inc. was subcontractor to the design consulting firm, Acumen Design.

International development team

Through Acumen, Daniel Follette worked with an international team spread from Singapore and Karachi, to Rio de Janeiro. Shell Team leaders were Houston and the principle ad agency was in London.

Shaping and naming the offering

Acumen and Follette worked primarily with the Houston team leaders to develop the concept. Creating a clear description of the bay configuration and consumer offering in a simple, comprehensive, visual guide was a major project task.

The team worked closely with the London agency to name and communicate the exact offering levels.

Recommended investment in comprehensive rollout tools and communications

After a six-month pilot, largely in Argentina, Acumen and Follette were asked to refine the offering. During that time, Follette interviewed pilot program managers. His findings suggested that success hinged on an extremely clear implementation process, comprehensive tools and effective rollout communications. Shell accepted the recommendations provided through Acumen.

Implementation task model

The tool set and communications package was based on a detailed behavioral implementation task model developed by Follette using his company's proprietary SkillForge™ software. The



Toolkit package and materials

2. PRE-SERVICE

**Forecourt
Greet Consumer**

Perform standard greeting and open-ended service inquiry.

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This greeting is used when the consumer has indicated his probable interest in an oil change by moving to the oil change area. This is the open-ended "how can I help you" script that leads to the decision to have an oil change. If the consumer asks for something other than an oil change, the technician must decide what kind of help, if any he can provide. If the decision is to get an oil change, this task leads to the task, "guide consumer into the bay."

Resources

Script Card: Laminated pre-service greeting script card

A brief laminated guide to the specific scripts used to greet consumers at the forecourt before any indication of interest in sales.

**Lube Bay
Deal with Busy Bay**

Describe options available to consumer when bay is occupied and help the consumer make a choice. Direct the consumer as needed.

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model identified the sequence and dependency of tasks; the job titles of country/region and local implementation teams; and the distribution of those tasks.

This information enabled the team to sequence the focus and detail of communications to implementation teams and provide the appropriate tools for each step of the implementation process, beginning with the first contact with a retail site manager. The same analytic process had been used earlier to define the step-by-step process used to deliver the service (see sample, below).

Implementation tool kit

Acumen and Follette assembled a packaged IMPLEMENTATION TOOL KIT that went out to each country/region implementation manager. The tool kit included:

- MARKET IMPLEMENTATION QUICK-START GUIDE, a single-sheet, high-level implementation roadmap.
- IMPLEMENTATION MANUAL (AND APPENDICES), Step-by-step instructions for creating engagement, adapting the program to the market and implementation. Appendices provide more detailed information.
- CUSTOMER INTERACTION STORIES, A booklet containing suggested ways of interacting with customers and for performing all three levels of service.
- TRAINING SETUP QUICK START GUIDE, Detailed information on preparing training materials.
- RETAILER'S GUIDE TO TECHNICIAN'S TRAINING, Instructions for the Retailer describing how to conduct technician training.
- TECHNICIAN'S SELF-STUDY MODULES, A series of training modules.

- RETAILER'S GUIDE TO SHELL HELIX OILCHANGE+, Program overview for the retailer.

Other TOOLKIT elements included tools to assess the competition and potential profitability; identity and branding masters; posters and POS; and performance aids. All materials were provided on CDs.

The importance of training

Training had been a challenge during piloting and the cost and logistics of formal training would be prohibitive in many regions. Follette devised a self-study process and materials that managers could implement. They provided clear objectives, activities and skill assessment.

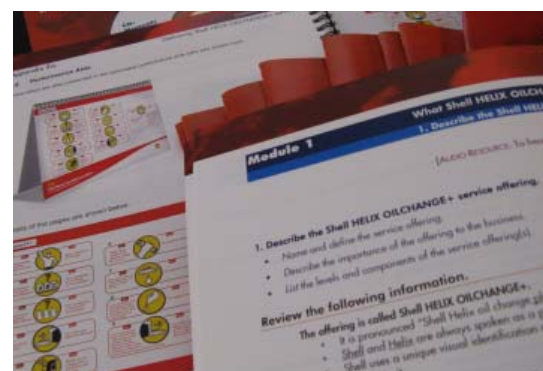
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Training module page and one performance aid description