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**Case Study: Change Management and Influence**

**Associates: Eversheds; Watson Wyatt; Beaufort Trust Ltd**

**Overview:** With a £42m pension deficit issue, it was critical for company survival that the 2200 UK employees and union representatives accepted a new benefits scheme. 100% of employees signed up. The success was due to change management and a win/win focus. The company now save £4m each year and the employee's perception of the company is that it is ethical, responsible and proactive.

### Issues

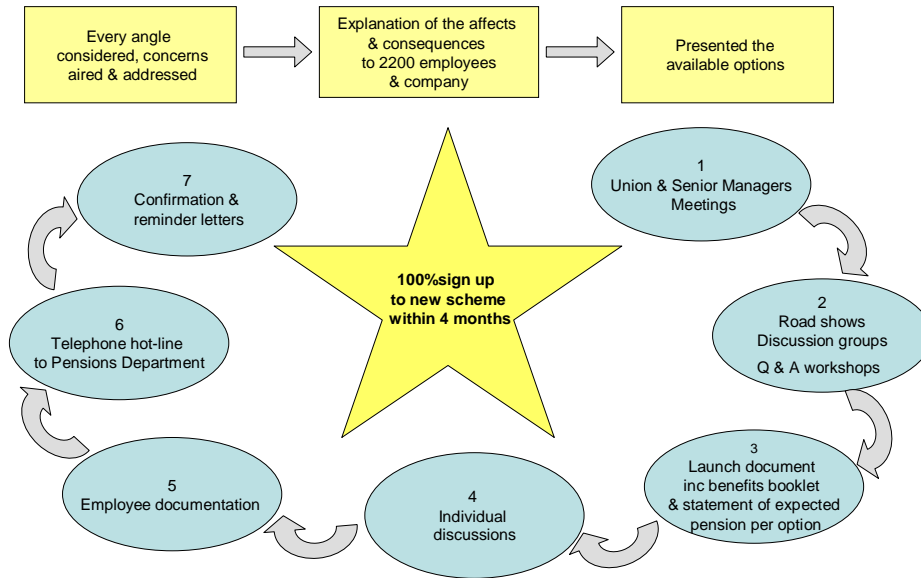
1. Risk analysis warned that without employee agreement to change the organisation current benefit scheme, the company could face legal challenges and risk liquidation due to a substantial pension deficit of £42m.
2. Voluntary employee agreement was imperative particularly in a unionised manufacturing environment.
3. The challenges were to:
  - a) Convince employees to increase pension contributions
  - b) Gain approval from the Trustee to change the pension benefits
  - c) Manage the morale and perception for all employees including the Directors and Senior Management as everyone was personally affected

### Results

A win/win situation for company and employees

- 1 The company saved an ongoing £4m every year
- 2 2200 employees agreed that change was necessary and 100% signed up to the new scheme within 4 months
- 3 Employee awareness that the company committed to honour the £42m pension deficit.
4. The employees' perception was that the company acted ethically; responsible; proactive and cared about the welfare of the employees
- 5 Employee options:
  - a) Continue with non contributory pension at a reduced accrual rate
  - b) Receive the same level of pension with an increased employee contribution
- 6 The company committed to a 12% contribution, which was higher than average employers

**Results were achieved by:  
Open Communication and Facilitation**



**Considered every angle  
Concerns were aired and addressed  
Consequences were clearly explained**

1. In-a Coaching developed and facilitated the communications plan. Presented the available options, with explanation regarding the UK climate and how this affected the employees and the company. Feedback was encouraged.
2. Each employee received a launch document including a benefits booklet and statements detailing the expected pension values, depending on the options available.
3. Regional road shows for 2200 employees. These included a presentation, question and answer workshops, followed by individual discussions; personal documentations and a telephone hotline to the pensions department.

**Summary:**

It was the intention of Arjo Wiggins Ltd and Antalis UK that they “did the right thing” by their employees and they agreed to honour the deficit. Going forward they were determined to be proactive and upfront with the resolution plan.

In-a Coaching UK Ltd ensured that all parties were kept openly informed and devised a communication programme that addressed the issues upfront. Worries and concerns were encouraged to be raised and were then addressed. Time and resources were committed to ease anxieties and to reassure employees of the clear steps and choices in place.



*"In-a has successfully supported operational management through the communication process that has secured major change. Antalis UK were required to implement the change with four months."*

**Gilles Raynaud – HR Director**

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*"In-a were one of the major contributors in ensuring the changes in benefit structure was fully considered, correctly implemented and effectively communicated to the members which avoided potential problems that could easily have arisen."*

**Keith Taylor - Pensions Manager**

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*"In-a played a great role in the planning and then in driving through the implementation. With energy and drive it all worked like a charm."*

**Giles Orton - Partner and Head of Pensions  
Eversheds**

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*"In any project about "change", good communications and project management are key - even more so when there are complicated technical aspects. In-a Coaching played a major role in the successful delivery of significant change."*

**Graham Finlay**

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**Beaufort Trust Corporation Ltd**

*"In-a represents a group of companies who all share a complicated pension scheme. As the professional trustee of the scheme I find myself on the other side of the table. It is always a pleasure to deal with Lynda - constructive dialogue, cheerful debate and brisk despatch of business."*

**Keith Wallace - Trustee & Solicitor**

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