

# CONVERSION MANAGEMENT

15 steps to managing a brand conversion.

In today's complex business environment many customers are faced with the challenges resulting from the effects of "merger mania." Whether you are converting your existing brand identity as a result of a recent acquisition or re-imagining your entire company you must quickly and seamlessly convert your corporate identity to maintain your customer's loyalty. Your brand conversion must be as subtle as a whisper but have the impact of a scream! Converting hundreds or thousands of locations can be a logistical nightmare and requires a discipline and conversion methodology that far exceeds the capability of most vendors. It's like drinking out of a fire hose! Whether you are managing the simultaneous conversion of 10, 100, 500 or 5,000 locations, it takes a team of seasoned project management professionals who have managed major corporate and retail facility conversions in broad geographic markets within seemingly impossible timeframes. It takes years of experience, sophisticated reporting tools and a network of qualified manufacturers, installers and field coordinators to be qualified to support such an initiative. The following 15 steps will help guide you safely across the chasm.

## 15 STEPS TO MANAGING A BRAND CONVERSION

### 1. Branding Your Environment

Whether your business is a bank, retail operation, e-store or restaurant, your branded environment is one of your organization's most memorable impressions in the hearts and minds of your customers. Retail and other public spac-

es are an opportunity to communicate unique brand promises and positioning. Most importantly, this is a second chance to make a great first impression. Beyond having an impactful, consistent and meaningful design, your environment must also have functional value to aid in merchandising, traffic flow and loss prevention. It takes a multi-disciplined team of professionals to provide numerous branded environmental and design recommendations during the strategic planning phase. Whether you are reimagining or converting your corporate identity, the process begins with branding your entire environment. An experienced professional services management firm typically maintains a team of graphic designers who are extremely skilled at providing branding recommendations.

### 2. Code Research & Permit Approvals

Managing the simultaneous conversion of 10, 100, 500 or 5,000 locations requires a synchronized coordination with hundreds, perhaps thousands, of municipal authorities to ensure that each approved branded element meets the building code. It takes a unique discipline to expedite permit approvals to ensure a successful on-time delivery of your conversion program. An experienced professional services management firm typically maintains trained project management professionals who have experience working with local municipal authorities and are skilled at expediting the approval process.

### 3. Landlord Approvals

Negotiating with landlords requires spe-

cial skills, especially if the landlord views the approval process as an opportunity to renegotiate the lease. Often, landlords will require additional improvements to the facility prior to approving the image conversion. An experienced professional services management firm typically maintains trained expeditors and negotiators who can quickly formulate an amicable resolution that will facilitate a landlord approval.

### 4. Conducting Technical Site Surveys

Once the site has been branded and the permit approval process is underway, it is imperative that a skilled technician visit each site to check the environmental conditions to ensure that the branded elements can be easily installed and that power where required is accessible. An experienced professional services management firm can assist with scheduling and deploying skilled technicians to conduct the technical surveys.

### 5. Managing the Vendor Community

Building and installing your new signage is only a small piece of the conversion program and each participating vendor should be qualified and evaluated on their available resources and conversion experience. The traditional best effort mentality just isn't good enough when delivering a conversion program. Each qualified vendor should be bonded, certified and insured. They should be experienced in the conversion arena and be able to reference successful programs where their completion and quality percentages scored in the upper 90th percentile.

Qualified vendors should be able to identify both their conversion management team and plant and production resources that will be dedicated to this program and have a detailed business continuation plan for disaster recovery. Qualified vendors should also be able to demonstrate their online real-time reporting tools as you simply cannot run a large conversion program with an Excel spreadsheet or shared workbooks. When time is of the essence, clear, concise and consistent information becomes an integral part of the success of the program. Each vendor should be able to demonstrate its capacity and capability to support the volume of business and clearly should be able to demonstrate its financial stability for sustaining such a large initiative. Converting hundreds or thousands of locations in a condensed timeframe requires a management discipline focused on delivering product quality and consistency throughout your entire footprint. When failure is not an option your vendors must provide service level guarantees to ensure that your program is delivered on time and on budget. Managing a diverse set of vendors to an on-time, on-budget successful completion requires the skills of a trained professional services organization. An experienced professional services management firm maintains the complex systems and proven methodologies required to qualify, select and manage a national network of suppliers and vendors to a successful program completion.

#### *6. Manage Product Quality and Consistency*

Periodic quality control audits and field site inspections yield high-quality products that are not only leading-edge, but also functional and easy to maintain. Your imaging assets require careful planning and experienced implementation management. An experienced professional services management firm will typically provide routine quality control audits and inspections to ensure quality and consistency across the entire footprint.

#### *7. Removal and Proper Disposal*

Proper removal and disposal of existing signage is extremely critical. Each element

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including lamps and ballasts must be disassembled, sorted separately and transported to a recycling facility for proper disposal. Qualified vendors should supply recycling reports to verify proper disposal methods and procedures. An experienced professional services management firm will typically collect the data from multiple vendors and supply a consolidated recycling report.

#### *8. Restoring Your Buildings*

Once the existing signage has been safely removed, the buildings must be power-washed, patched and painted to hide the ghosting effect caused by the original signage installation. Customers are now requiring that the removal, restoration and installation be condensed within 1 week to minimize the effects of the corporate identity transition. An experienced professional services management firm will coordinate the entire implementation process to ensure that each of the approved suppliers and vendors are working seamlessly in concert.

#### *9. Provisioning Electrical Service*

The technical survey is a great tool for determining power requirements for new sign and lighting elements. New illuminated signage may require additional circuits or new lines that can be determined during the technical survey. Occasionally, restoration companies will patch and paint over existing connections requiring on-call electricians to be dispatched to

make the final connection. An experienced professional services management firm typically maintains a 24/7/365 call center to handle pre- and post-installation service requests.

#### *10. Providing Temporary Signage*

No site location can remain unbranded. Temporary signage must be installed during the removal, disposal and restoration phase of the conversion to ensure business continuity. Banners and/or temporary signs are supplied and installed by the signage vendors until each of the final elements have been completed, installed and unveiled. An experienced professional services management firm will monitor each site location to ensure that each location is properly branded throughout the entire conversion process.

#### *11. Managing the Fabrication and Installation*

Managing the fabrication and installation of thousands of signs destined for hundreds or possibly thousands of locations is no easy task. Multiple vendors selected to build specific sign types will be required to ship selected products to predetermined sites that will be scheduled for installation by a team of skilled field technicians. New footings and foundations must be approved by permitting officials prior to installation. It requires complex systems, a proven conversion management methodology and a team of experienced air traffic controllers. When failure is not an option, contract with a

seasoned professional services management firm who has the experience to deliver your conversion program on time and on budget.

#### 12. Restoring Your Landscape

Often, new monuments and pylons will require new footings and foundations that will require the disturbed soil to be completely landscaped. Often, retailers will select a common landscaping theme that will be replicated throughout the entire footprint. An experienced professional services management firm will coordinate the complete landscape restoration to ensure consistency throughout your entire footprint.

#### 13. Bagging & Bannering

It is imperative that your new signage remains bagged and/or bannered until CD-1 ("Customer Day One"). On-call service must be available to dispatch a field technician in the event a banner or bag fails to stay attached to the new sign. An experienced professional services management firm typically maintains a 7 x 24 x 365 call center to handle pre and post installation service requests.

#### 14. "The Unveiling"

CD-1, or "Customer Day One," is the moment we have all been waiting for! The moment of truth! The big crescendo! Teams of installation crews must canvass the entire footprint removing bags and banners that were installed during the installation process to hide the new brand image. In one magical night or weekend hundreds or thousands of locations are unveiled to the public in a media frenzy designed to create excitement around the launch of the new brand. I wish it were as easy as waving a magic wand but unfortunately teams of field technicians must be efficiently routed to thousands of locations in a 24-, 48- or 72-hour timeframe to successfully complete the unveiling. An experienced professional services management firm typically maintains a 24/7/365 call center that can efficiently schedule and dispatch field resources to complete this overwhelming task.

#### 15. Quality Control Audits

"Creating the Punch List": Periodic daytime and nighttime visual inspections must be completed to ensure quality and consistency across the entire footprint. Once the fog of war has lifted and all the sites have been unveiled, a complete set of final completion and branding photos must be captured and cataloged for future reference. All punch list items must be documented and submitted to the appropriate supplier or vendor for immediate problem resolution. An experienced professional services management firm can assist with preparing a complete photo library, mediating problem resolutions and preparing closeout documentation.

#### SUMMARY

How do you manage the simultaneous conversion of 10, 100, 500 or 5,000 locations? Hire a team of seasoned project management professionals who have the experience to manage major corporate and retail facility conversions in broad geographic markets within seemingly impossible timeframes. There are a number of national firms that offer a wealth of experience to all facets of corporate identity — conceptual design, guidelines and specifications, vendor coordination, launch planning and ongoing identity management.

You may also find that many of your national sign service providers maintain a similar team of implementation experts who have planned and managed regional, national and global brand conversion programs for numerous corporations, with experience in a wide variety of business sectors. Their project management professionals should have the proven experience to successfully lead a company through the identity conversion process. Depending on the size and scope of your program, a direct relationship with your national sign service provider can achieve similar results while eliminating a considerable amount of confusion, complexity and cost.

Whether you are creating a completely new identity, refreshing an existing identity, or simply cleaning up an identity gone wild, I encourage you to seek the assistance of a national sign services provider who has the expertise to execute the 15 steps that will help guide you safely across the conversion chasm. **PRSM**