



## DELUXE CASE STUDY: 1<sup>ST</sup> ENGAGEMENT

**Challenge:** Reorganizing reporting structures and lowering employee turnover rate

**Solution:** Two part engagement: Process Audit + Employee Retention

**Industry:** Financial Administration



### SITUATION

Deluxe Corporation, a financial administration organization, was struggling with internal changes centered around an acquisition that involved reorganizing the reporting structure and merging call centers with sales centers, while trying to force that into an old silo-ed model. While management knew that strategy wasn't going to work in a changing business environment, they were having trouble seeing past their own headlights, along with strong opinions and internal politics involved. Leaders didn't feel the best ideas were being brought to the table and they worried they weren't looking at each problem from the right angle.

They knew they needed an outside perspective. A director at Deluxe had previously worked with AdamsGabbert CEO Denise Kruse, and told Mark Byers, vice president – SBS Direct Channel, that AG needed to be his first call. A week later, Denise was sitting in Mark's office.

### SOLUTION

Prior to AG's solution, Deluxe assigned each general manager (GM) based on skills. One GM, for example, would manage 10 jobs across five sites, requiring travel between every site and a major inefficiency in time management. Deluxe operated with this model for four years.

AG audited the model and process and recommended that each GM should be assigned geographically. Each GM would be accountable for every job skill within his or her location, including sales, support, operations and employee engagement.

Byers shared that AG went above and beyond, providing Deluxe with a custom solution: "I didn't have a specific budget to work with, so we had to get a little bit creative," he said. "They never handed me a menu of set prices and services; they talked through it and were able to find the best solution for us."

### RESULT

Referring to AG as the "un-consulting firm," Byers appreciated that Denise was always in contact and the work was not delegated down. Instead, Denise took the time to personally send emails, call and stop by the Deluxe offices.

"Working with AG gave me the confidence that we found the best solution," Byers shared. "They were fantastic at listening, iterating ideas and partnering. We had rationale around why we're going down this path; we knew we've looked at it from all different angles and were able to shift with confidence and with everybody on board."

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*Mark Byers, Vice President, SBS Direct Channel*



## DELUXE CASE STUDY: 2<sup>ND</sup> ENGAGEMENT

### SITUATION

Deluxe employs roughly 200 Millennials as inside sales reps, but for the past three years, the company has seen a 90-percent turnover rate. After a series of attempts to solve the issue (including pay increases) over the span of two years, the company was still seeing a 90-percent turnover rate. Deluxe once again needed an outside perspective to evaluate the situation and truly understand what Millennials are looking for in a career. Again, AG was their first call.

### SOLUTION

Immediately, AG's consulting team helped Deluxe management understand that there's no single "magic bullet" when it comes to retaining Millennials and lowering the turnover rate. Instead, the focus needed to be on four distinct areas that included: recruiting efforts (finding the right fit for the company's business model); orientation (redefining the onboarding process for new employees); skill development (examining growth opportunities and career pathing); and flexibility (implementing new opportunities that appealed to Millennials, but also fell within employer expectations).

### RESULT

Deluxe had a set a goal to reduce the turnover rate from 90 percent to 78 percent; they exceeded that goal in 2017, reducing that number to 69 percent. "Every time we keep one person from walking out the door, we save \$40,000," Byers shares. "Those results speak for themselves."



#### TURNOVER RATE REDUCTION, 2017:



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