

Impact Assessment

Prepared for: OCM Lead, Project Lead, HR Business Partner & Executive Sponsor | Initiative:
 | Assessment Date:

SECTION 1 — IMPACT FRAMING

This Impact Assessment covers four named business areas and 21,000 affected employees (10,000+ scale) undergoing simultaneous tool, process, role, and — for one group — structural change. At a high level, the impact is a new AI copilot changing how contact center and branch service colleagues document and handle customer interactions, a policy and compliance shift in how disclosures are captured and monitored, and a structural redeployment of a 350-person back-office team whose manual tasks are being substantially automated. No involuntary separations are in scope, but survivor anxiety is present and documented: employees not directly affected by the redeployment are nonetheless concerned this is the first phase of a broader AI-driven reduction, so the impact scope includes both the directly affected redeployment population and the much larger retained workforce. This document exists to calibrate the intensity of communications, training, and support for each group and to identify where the highest-risk people implications require immediate attention.

SECTION 2 — IMPACT MATRIX

Group	Head count	Severity	Nature	What Is Changing	Key People Implications	Risk Flags
Executive / Senior Leadership	Not provided	Moderate	Governance responsibility, no direct workflow change	and the C&BB leadership coalition are accountable for sponsoring and modeling adoption across all four business areas.	Sponsorship visibility now a measured behavior, not a formality; accountable for the standalone job-security statement	
People Managers	~700 (within Ops/Prod)	High	Role responsibility changes; process/work flow changes	Team leads and supervisors across 14 contact center hubs and six branch-service regions must coach colleagues through while continuing to hit service targets during the transition.	New coaching skill required with no current preparation; workload increase during the six-week phased training window; performance expectation	⚠ HIGH RESISTANCE

Group	Headcount	Severity	Nature	What Is Changing	Key People Implications	Risk Flags
					changes	
Operations/Production — Contact Center & Branch Phone Service	19,800	High	Tool/system changes; process/work flow changes; role responsibility changes	Colleagues transition from manual post-call documentation in the legacy CRM to AI-drafted summaries and next-best-action prompts, shifting toward reviewing and validating AI output rather than typing it from scratch.	New skill required: critically evaluating AI-drafted compliance disclosures; job security concern; workload increase during the two-week shadow-mode period per cohort	● CRITICAL: HIGH RESISTANCE · △ JOB DISPLACEMENT FEAR
HR/People Org — Back-Office Documentation & Reconciliation	350	High	Headcount/structural change (redeployment, no net job loss); role responsibility changes	This team's manual reconciliation and documentation tasks are being substantially automated; colleagues are being redeployed into expanded servicing roles with pay and title protection.	Role identity disruption; new skills required for the servicing roles they are moving into; reporting structure changes for a subset of this group	△ IDENTITY DISRUPTION
Legal & Compliance — QA/Compliance Monitoring Analysts	210	Medium	Policy/compliance changes; process/work flow changes	Monitoring workflow shifts to reviewing AI-flagged interactions rather than manual sampling alone; policy updates to the call-monitoring and performance-management guidelines are this group's direct responsibility.	Policy/compliance obligations increase; cross-functional coordination requirement with HR Total Rewards	ⓘ CHANGE FATIGUE (org-wide culture signal)
Information Technology — Platform/Integration Engineers	640	Medium	Tool/system changes	Engineers own the [REDACTED] integration, legacy CRM retirement for in-scope teams, and post-go-live technical support handoff.	Cross-functional coordination requirement with the OCM program on transparency and accountability documentation	

△ **PROPORTIONAL SCALE FLAG:** Operations/Production represents approximately 94% of in-scope headcount (19,800 of 21,000). A single high-impact group represents at least half of all in-scope employees. Communications, training, and support resources must be weighted accordingly — do not apply uniform intensity across all groups.

SECTION 3 — IMPACT SUMMARY

The aggregate impact picture for this initiative is High-severity and concentrated, not evenly distributed: three of six groups carry High severity, and one group alone accounts for 94% of the affected population. The Operations/Production frontline population carries the highest people risk in the assessment — it combines the largest headcount, the most direct daily workflow change, and an active job-security resistance driver, all at once. The HR/People Org redeployment team carries the second-highest risk despite its much smaller size, because identity disruption compounds quickly when a team's defining work is being automated even without job loss.

AI implementations carry a specific impact dimension that other technology changes do not — the potential perception of job displacement regardless of actual workforce plans. The impact narrative for this initiative must address this directly and proactively, not reactively, particularly given that job security fear is already the named primary resistance driver rather than a secondary concern. Historical resistance data is available for this organization and should inform sequencing: groups that resisted the 2024 case-management migration and the 2025 collections RPA pilot require early, direct engagement before broad communications launch. In the next two weeks, the project team must confirm the redeployment role placements for the 350-person HR/People Org team and finalize the sponsor's direct employment-impact statement — both are prerequisites to engaging the two highest-risk groups identified above.

Prepared by GOccelerate™ | [REDACTED] | Confidence: Very High (100%)

The GOccelerate People Risk Index (PRI) is a formative, expert-derived index of people and adoption risk across four dimensions — Leadership, Stakeholder, Capability, and Sustainment — grounded in established organizational change management practice. Dimension scores reflect equally weighted, normalized risk points assigned through expert judgment rather than statistically estimated weights. Baseline results derive from a structured intake completed by a single informant and reflect that respondent's knowledge of the organization at the time of assessment; the accompanying Data Confidence indicator reflects the completeness of the information provided. Risk bands are provisional and subject to recalibration as GOccelerate's outcome-validation program accumulates post-implementation adoption data.