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Implementing a change process in a customer service team

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Abstract

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This master's Thesis focuses on improving the daily operations of the customer service team at the client company. The customer service team currently has several manual tasks that consume unnecessary time, making their work inefficient.

The project began by identifying and defining the problem. The current state analysis revealed the challenges faced by the customer service team. The current situation was assessed through interviews with customer service team members. The analysis showed that the daily work of the customer service team was inefficient and involved many manual processes. To enhance the efficiency of the customer service team, changes were necessary to increase productivity and successfully implement the change process within the team.

Literature on change management models and automation project implementations was reviewed to address these challenges. Two change projects were initiated to improve the customer service team's operations: the order handling project and the loading plan tool project.

As a result of this work, two automation projects were completed, significantly improving the efficiency of the customer service team. Additionally, the thesis describes how the implementation of these change projects was successfully carried out within the team.

Keywords: Customer Service, change process, automation, Order handling

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Contents

1 Introduction

Businesses face constant pressure to adapt to a rapidly changing environment. If companies don’t evolve quickly, they risk falling behind competitors and losing their market position. (Pirinen, 2023, p.17)

Change is playing an increasingly important role in the company’s daily operations. Employees are key to this process; their active support is essential for successful change. After implementing a change, it is important to evaluate its impact on the company’s overall effectiveness. (Lauer, 2021, pp.3-6).

Successful change often requires a shift in organizational culture and behavior, which can only happen through teamwork. It’s important to review successes and lessons learned to make the most of them. (Pirinen, 2023, pp. 18-20)

Leaders must involve employees early and communicate clearly to encourage their support of change. By making the change interesting and motivating, leaders can encourage employees to take part in and contribute to the process. (Pirinen, 2023, pp.18-20)

1.1 Background

The client company's business environment is constantly changing, and the client company must respond to these changes. Additionally, the client company recently changed ownership. The new owner wants to ensure that the client company's operations remain competitive.

During the research period, the client company is undergoing several major transformation projects. The client company's management and the owner are committed to these projects and support their successful completion.

This thesis has been conducted from the perspective of the customer service team within the client company. The focus of the research is on how to develop the customer service team's operations to ensure competitiveness in the future.

The client company has challenges with the effectiveness of its customer service. The owner of a client company requires more actions to raise effectiveness. When focusing on effectiveness, the emphasis should be on how daily tasks are performed, as this directly impacts the customer service team's workflow

This thesis is focused on changing daily processes in customer service. In this thesis, certain focus areas should be changed and implemented. The change process is done together with customer service team members.

The thesis has been completed for a client company in the industrial sector. The client company has 70-80 employees and is a medium-sized company. It was previously a family-owned business. A few years ago, the ownership changed, and the current owner is a large European company in the industry. Turnover in 2023 was approximately 30-40M€.

There are currently approximately 10 workers on a customer service team. All workers are in Finland. Customer service teams handle order handling, customer communication, reclamation, and deliveries.

1.2 Research problem

The goal of the research is to identify ways to enhance and modernize the customer service team's operations to meet future demands. The customer service team of the client company is experiencing inefficiencies, such as miscommunications, monotonous tasks, high error rate, and inconsistent service quality, which are reflected in various performance indicators.

Miscommunications

The team collaborates closely with other departments, and daily processes are interconnected. However, communication between teams is ineffective, with

much of the information being exchanged through email or Teams messages, which contributes to inefficiencies.

High error rates

The daily work of the customer service team involves many manual tasks. These manual tasks consume a significant amount of employees' time. Additionally, manual work carries the risk of errors. Correcting mistakes takes time and resources, and in the worst-case scenario, these errors can negatively impact customer satisfaction and customer relationships.

Monotonous tasks

There are also routine and monotonous tasks in the customer service team’s daily work. In these tasks, the same actions are repeated. The team members have mentioned that performing these repetitive tasks is uncomfortable and tedious.

Inconsistent service quality

Customer service team members have different ways of carrying out work tasks. Although the outcome of the tasks is the same, the quality of work varies. The quality of service the customer receives depends on which customer service representative handles their inquiry.

According to Van Doorn 2017, Customer service is evolving rapidly with technological advancements, and by 2025, it is expected to incorporate even more automation, such as service robots. Automated Social Presence (ASP) refers to the extent to which technology, including robots and virtual assistants, can create the feeling of another social entity’s presence for customers. This presence can either complement or fully replace human-provided customer service. In the future, service experiences will be increasingly managed through technology, shaping both customer expectations and business operations.

The solution to research problems is to automate customer service team processes. The research problem focuses on automating the tasks of a customer service team within a short timeframe, where the success of the change depends on the commitment of the team members to the change and their active participation in the process. The challenge lies in ensuring the team is motivated, engaged, and supportive of the change to achieve successful automation and adaptation.

The thesis finds ways to handle the changes and new processes. The Thesis gives answers to understand why the company is making this change. The key point in the change process is committed workers.

1.3 Research questions

A research question is the question that a study aims to answer. It defines the focus of the research and guides the entire research process, including data collection, analysis, and conclusions. A good research question is clear, and specific, and allows for in-depth exploration. It could be, for example, an inquiry into cause-and-effect relationships, a description of a phenomenon, or a comparison of different factors. (Cresswell, 2014, pp.191-223)

The main objective of this study is to improve efficiency and save time. of the customer service team's workflows through automation and well-managed change. The research questions focus on understanding the current state, planning the implementation of automation, and evaluating its effects. The questions the study aims to answer are:

1. What are the root causes of customer service's current state (CSA), and how can they be resolved with the help of automation?
2. How should be deployment process of automation be planned and implemented effectively?
3. Can automation, a well-executed change process, and well-managed change of automation deployment improve efficiency?

1.4 Research schedule

The research planning began in December 2024, and the change project was officially launched in January 2025. The research schedule is presented in Table 1.

Table 1: Research schedule

Action	**Time frame**
Development Plan	December 2024
Data collection	December 2024
Interviews part 1	January and February 2025
Finding automation companies and starting to work with them	January 2025
Regular meeting with automation companies	January, February and March 2025
Automation tools implementation	April 2025
Interviews part 2 and results	May 2025

At the beginning of the project, interviews will be conducted to assess the current state of the client company's customer service team. Based on these interviews, key transformation projects will be identified and selected for implementation within the team. Next, decisions will be made on how to execute these projects and which automation solution providers will be involved in the process. The transformation projects will be carried out during the spring of 2025, ensuring that

all changes are in production by April 2025. A second round of interviews will take place in May 2025, marking the completion of the study.

2 Research Methods

In this chapter, the focus is on the research and development methods used in the thesis. The study utilizes qualitative research, which has been conducted through interviews.

2.1 Qualitative research

Qualitative research is a research method that explores human experiences, social interactions, and cultural phenomena by collecting and analysing data such as interviews, observations, and documents. The goal is to uncover the multiple layers of meaning within the studied phenomenon and to understand its contextual nuances more deeply than numerical measurement alone would allow. (Purssell, 2020, p.14)

Qualitative research is done by interviewing customer service team workers. The interviewees were informed about GDPR requirements. The interviews were conducted anonymously, ensuring that the participants could not be identified through their responses. Interviews are done in two parts. The first part is done before the change, and the second part is done after the change. The second part, interviews and results of this thesis, is shown in Chapter 5.

2.2 Interviews

From the perspective of assessing the current situation, the next section discusses the interviews conducted in the first phase. The interviews for the second phase will be conducted after the change process, and the results of these interviews are shown in Chapter 5 of this thesis.

Interviews were chosen as the data collection method because the customer service team includes employees with extensive experience working in the client company's customer service. They possess the best expertise and insights into the direction in which the client company's customer service should be developed.

Another key objective is to engage customer service team members in the change process. By involving them early in the process, their commitment to the transformation can be strengthened, fostering a smoother transition.

2.2.1 Phase 1 interviews: Understanding the current state

The first round of interviews was conducted anonymously in early 2025. The first round of interviews was conducted during January and February 2025. Two employees working in the role of service specialists participated in the interviews. Both had extensive experience working in the customer service team. The first-round interviews lasted between one and two hours. To ensure participant confidentiality and enable open and honest discussions.

Although the conversations were guided by pre-prepared questions. The interview questions aimed to explore employees' perspectives on the current state of the customer service team, their views on the upcoming organizational change, and their thoughts on the new company strategy. The questions also touched upon broader themes such as individual responses to change, key elements in the change process, and the evolving nature of customer expectations. Specific attention was given to how employees perceive leadership's role in driving change and what future trends they foresee in customer service.

The questions were designed to align with the main research objectives of this study, which focus on understanding how long-term customer service professionals experience and interpret organizational change. The semi-structured format enabled deeper insights while maintaining consistency across interviews. The full list of interview questions is available in Appendix 1.

During the interviews, members of the customer service team shared their perspectives on the current state of the team and its daily operations. While the work was generally perceived as running smoothly, several inefficiencies were highlighted, especially unnecessary and manual steps that slow down tasks and reduce overall effectiveness.

The main objective of this first interview phase was to develop a comprehensive understanding of the team's current situation rather than propose final solutions. The discussions focused on identifying inefficient processes, areas needing improvement, and the underlying causes of these challenges. Two specific processes were frequently mentioned: order handling and the creation of loading plans. Both processes are seen as overly manual and time-consuming.

In addition, the interviews explored how team members could be better engaged in the change process and what leadership should consider when implementing improvements. The insights gained from these discussions serve as a foundation for future change planning, including the scheduling of actions and assignment of responsibilities.

2.2.2 Interview findings and development actions

Based on the interview data, a current state analysis was conducted, revealing clear areas for improvement within the customer service team's operations. Two key processes emerged as major challenges: order handling and the creation of loading plans. Both were described as overly manual, time-consuming, and prone to error.

Although order handling is fundamentally a simple task, it is currently performed in a complicated and inefficient manner. Several steps were considered unnecessary, and participants expressed a desire to automate the process to streamline the workflow and reduce time spent on repetitive tasks.

The second major challenge involved the creation of loading plans. At the time of the interviews, this task was assigned to only one person, creating a dependency

and increasing the risk of errors. The process requires routine and practical experience, which makes it difficult to delegate and train others efficiently. Participants also discussed the possibility of using tools to generate loading plans automatically based on order data.

The interviews revealed that the customer service team had been waiting for a change for a long time. Although the need for improvement was widely recognized, no concrete actions had yet been taken. The team’s attitude toward change was cautiously optimistic, yet skeptical about whether meaningful progress would happen. Many emphasized that successful change would require the full commitment of the organization, especially from leadership.

The interview findings provide a solid foundation for planning the next steps. The goal is to improve operations through structured development actions such as automation and process simplification. Ultimately, these efforts aim to reduce manual work and enhance the team’s overall efficiency.

3 Theoretical framework

In the theoretical framework, the theories used in the research are discussed. Additionally, the theoretical framework explains how these theories have been applied in the implementation of the research itself.

Since the automation projects implemented in the research also affect the organization and the customer service team's operations, the research utilizes theories related to the implementation of automation products, specifically the Technology Acceptance Model (TAM) and change management.

The change process utilized Lewin’s three-step model (unfreeze, transition, refreeze) and Kotter's 8-step model effectively guide teams through the stages of change.

3.1 Technology Acceptance Model, TAM

The Technology Acceptance Model TAM, can be used in the implementation of an automation project by assessing how users' attitudes and beliefs influence their intention to adopt new technology. The model focuses on two key factors: perceived usefulness (PU) and perceived ease of use (PEoU). These can predict how likely users are to adopt the automation system. (Stephanidis, 2024, pp.168-169)

Perceived Usefulness (PU): If users believe that the automation system will improve their performance or make their tasks easier, they are more likely to intend to use it. It is important in an automation project to communicate how the system provides tangible benefits to users. (Stephanidis, 2024, p.347)

Perceived Ease of Use (PEoU): If the system is easy to use and intuitive, users are more likely to adopt it. The system design should consider the target audience’s cognitive abilities and ensure that the interface is simple and clear. (Stephanidis, 2024, p.347)

Trust and Information Quality: Additionally, trust in the system's reliability and the quality of information (e.g., accuracy, relevance) will impact on the likelihood of adoption. If users perceive the system as trustworthy and it provides up-to-date and relevant information, they will be more inclined to use it. (Stephanidis, 2024, pp.347-349)

By applying the TAM model in an automation project, the focus can be on improving users' attitudes, ensuring ease of use, and highlighting the system's usefulness, which ultimately enhances the project's chances of success and user acceptance. (Stephanidis, 2024, pp.347-351)

3.1.1 Technology Acceptance Model, TAM implementation to customer service team

The TAM model was applied in the automation projects of the company during the project planning phase. During the planning phase, the focus was on ensuring that the automation implementations would be useful from the user's perspective and easy to use.

In the order automation project, the goal was to simplify the order processing by eliminating unnecessary steps. The intention was to implement the order processing so that it does not require separate work from the customer service team, and the processing would proceed automatically.

In the loading plan tool automation project, it was decided not to use a separate tool for creating loading plans but to integrate the program into the existing system. This decision enhances the tool's ease of use and ensures that training for the tool is quick.

3.2 Change management

Change is a permanent condition in organizations, whether we want it or not. Effective leadership plays a crucial role in how successfully a company can implement ongoing changes and reap real benefits from them. Change leaders must have the courage to significantly alter company structures and ways of working to ensure long-term sustainability. (Pirinen, 2023, pp.22-24)

Changes come in many forms and at increasing speeds, pushing businesses to adapt or risk falling behind competitors. For change to succeed, all employees must be engaged, motivated, and committed to seeing the transformation through to the end. Without substantial transformation, changes might remain superficial, and their benefits might be limited. (Pirinen, 2023, pp.22-24)

Social Aspects of Change

The social aspects of change are often overlooked, but they are central to its success. The biggest benefit of change is often the shift in organizational culture and behaviour, which requires collective effort. Successful change also involves creating a sense of community and ensuring that achievements and lessons learned are shared to maximize the benefits of the transformation. (Pirinen, 2023, pp.24-28)

The Role of Employees

Employees have a natural desire to show their capabilities and contribute to the change. Fostering a "Yes, we can" attitude helps employees feel more confident and willing to engage in the change process. However, previous failed changes or the lack of visible benefits can breed scepticism and resistance. Therefore, leaders must involve employees early on, making the change process compelling and relevant to them. (Pirinen, 2023, pp.18)

Psychological Preparation

Leaders can help prepare employees mentally for change, especially at the beginning of the change process when receiving messages may be difficult. Seeking employees' opinions beforehand and involving them in the decision-making process can significantly ease the transition. When employees feel heard, they are more likely to accept change and see its benefits. (Pirinen, 2023, pp.18)

Managing Uncertainty and Change Resistance

Change often generates feelings of uncertainty. When new ways of working are introduced, employees may resist leaving behind familiar methods. Overcoming this resistance requires emotional support and constant feedback from leaders. Leaders must acknowledge that the process of learning and adapting is gradual and varies among individuals. (Pirinen, 2023, pp.165-166)

Clear and Realistic Goals

To reduce uncertainty, leaders must communicate the key objectives of the change. Breaking down larger goals into smaller, manageable tasks can make the change process feel more achievable. Clear communication ensures that employees understand what is expected of them and how they can contribute to the overall change. (Pirinen, 2023, pp.15-17)

Shared Understanding and Employee Involvement

Involving employees in the change process from the beginning is crucial. Leaders must create a shared understanding of the goals, the process, and the impact of change on employees' roles. This shared understanding helps employees see the bigger picture, making them feel part of the change and less likely to resist it. (Pirinen, 2023, pp.15-17)

Realistic Expectations

For change to be successful, expectations must align with what is realistically achievable. Setting overly ambitious goals can demotivate employees and lead to frustration. Leaders should ensure that objectives are realistic and that they have the necessary resources to support employees in meeting them. (Pirinen, 2023, pp.23-26)

Effective Resource Management

Successful change management requires effective resource allocation. Leaders need to be skilled in managing both human and material resources, ensuring that employees are adequately supported during the transition. This may involve hiring additional staff, providing proper training, and using technology to enhance the change process. (Pirinen, 2023, pp.26.28)

Communication and Participation

Clear and continuous communication is vital in managing change. Leaders should ensure that employees are regularly updated on the progress of the

change process. Involving employees in decision-making can increase their motivation and commitment to the change. Encouraging employees to actively participate and voice their opinion during the process helps create a more engaged and productive workforce. (Pirinen, 2023, pp.26-29)

In conclusion, effective change management involves a combination of clear communication, realistic goal setting, emotional intelligence, and employee involvement. Leaders must guide their teams through uncertainty, fostering a culture of collaboration and support to ensure the successful implementation of change. (Pirinen, 2023, pp.26-29)

3.2.1 Change management implementation to the customer service team

This thesis investigates how customer service employees experience and adapts to organizational change, particularly in the context of automation projects. In automation projects, employees are engaged as part of the change process. In addition, customer service team members can influence the outcome of the change project. The progress and schedule of change projects are regularly discussed in the customer service team's meetings. This keeps automation projects actively on the minds of customer service team members and makes it easier to internalize upcoming changes.

During the change project, the supervisor is easily accessible and provides support throughout the transition. Time is allocated in team meetings to discuss upcoming change projects. In addition, the supervisor organizes one-on-one meetings where team members can calmly talk about any concerns related to their work or the changes.

3.3 Lewin's three-step change model

Kurt Lewin's "three-step model of change" (unfreezing → changing → refreezing) is often seen as an important way to manage change, even though some people think it makes the process too simple. However, the importance of this model is still accepted. We believe that Lewin didn't create this model himself, and it only

became popular after he passed away. In Figure 2 Lewin's three-step change model is shown. (Cummings, 2015, pp.33-60)

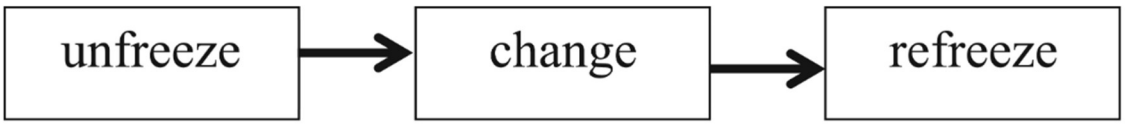

Figure 2. Lewin's three-step change model (Cummings, 2015, pp.33-60)

Kurt Lewin is widely recognized as the founder of change management, with his unfreeze–change–refreeze (CATS) model seen as the classic approach to managing change. This model has been the dominant framework in change theories for over fifty years, and many scholars believe that all change theories can be traced back to Lewin's ideas. Practitioners also consider his model to be a powerful tool for managing change. Lewin's work is praised for providing a strong foundation for change management, and his ideas have greatly influenced the field. (Cummings, 2015, pp.33-60)

Despite some criticism, others defend Lewin, arguing that his model is just one part of his broader theories, which also include field theory, group dynamics, and action research. Even though some of Lewin's ideas about change may be misinterpreted, many still consider the CATS model to be fundamental to change management. (Cummings, 2015, pp.33-60)

Lewin's (1949) three-stage change model describes the process of unfreezing, changing, and refreezing, using the analogy of changing the shape of a block of ice. The first stage, unfreeze, involves preparing the organization for change by breaking down the existing status quo. Leaders must highlight problems (e.g., poor sales or customer satisfaction) to show the need for change and challenge current beliefs and behaviors. This creates a sense of urgency, motivating the organization to seek a new way of operating. (Keow Ngang, 2019, pp.50-51)

In the second stage, change, employees start to accept and adopt new ways of working. The transition takes time, and employees need to understand how the

change benefits them. Not everyone will automatically embrace the change, so leaders must ensure employees are motivated and engaged in the process. The final stage, refreeze, occurs when the changes are fully implemented and accepted. The organization stabilizes with new systems and behaviors, ensuring the changes become part of the everyday routine. Refreezing is important to prevent the organization from remaining in a state of uncertainty. It provides closure and helps employees feel confident in the new way of working, which is essential for future successful changes. On figure 3 are shown Lewin's three-step model. (Keow Ngang, 2019, pp.50-51)

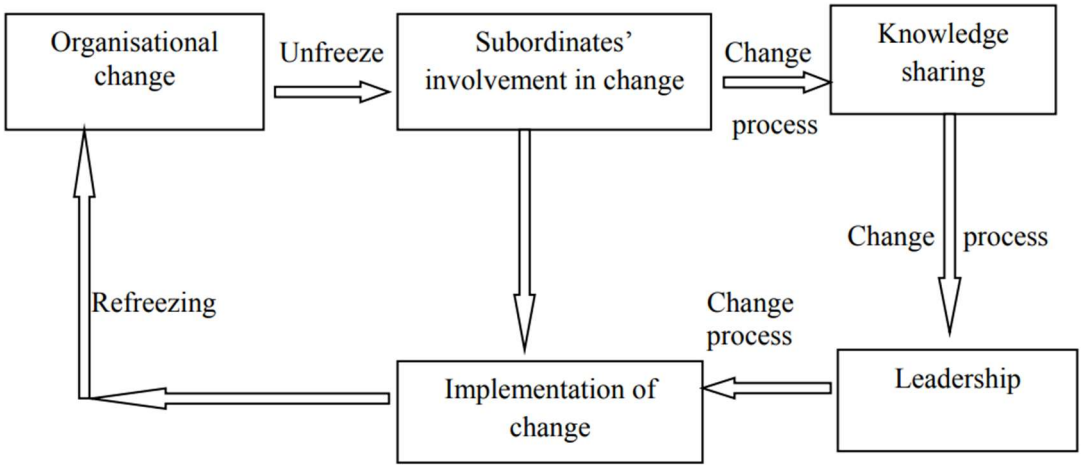

Figure 3 Lewin's three-step model (Keow Ngang, 2019, pp.50-51)

3.3.1 Lewin's three-step change model implementation to the customer service team

As this thesis explores how customer service employees experience and adapt to organizational change, particular attention is given to the psychological and structural factors that support successful transitions. Additionally, it has been found that resilience plays a critical role in overcoming resistance to change. Resilient teams can adapt to new situations and bounce back from setbacks and are more likely to embrace change. Research indicates that addressing resistance with clear communication and support strategies is vital for smooth transitions.

Lewin’s three-step change model (Unfreeze – Change – Refreeze) helps ensure the success of the automation project in the customer service team. In the first phase, Unfreeze, the team is prepared for change. Practically, the customer service team is informed that two major change projects will be initiated. They are also provided with an explanation of why the automation of work phases is necessary and the reasons behind these changes in projects. This phase helps reduce resistance to change through open discussions and training, ensuring that employees understand the benefits of the change and feel secure in adopting new processes. Throughout the entire change process, open communication and transparent information sharing within the customer service team are crucial for the success of the project.

In the second phase, Change, automation is implemented, and the team begins to adopt new ways of working. During this phase, sufficient support and guidance are provided to ensure that employees can utilize the new system smoothly. The team is encouraged to experiment with the new processes and collaboratively address any challenges that may arise, making the transition as seamless as possible.

In the third phase, Refreeze, the change is solidified as a permanent part of the team's daily operations. Continuous monitoring and adjustments are made as needed to maximize the benefits of automation. Additionally, the new way of working is reinforced through positive feedback and incentives, ensuring that employees perceive the change as positive and remain committed to it in the long term.

3.4 Kotter's 8-step model

Kotter (1995) developed a model for understanding and managing change based on his work with many organizations. After observing the challenges organizations faced during change, he identified common patterns and created a framework to guide the change process. His model, which operates at the strategic level of change management, is best seen as a "vision" for how change

should be managed. Figure 4 shows Kotter's 8-step change model. (Keow Ngang, 2019, p.53)

Establishing a sense of urgency	Urgency motivates subordinates and generates a sense of realism with respect to change efforts goals. It is also essential to achieve the right chemistry and mix amongst team members, paying close interest to levels of emotional commitment
Forming a powerful guiding coalition	Forming a powerful guiding coalition is the most concerned in the gathering of the powers that be, senior management and key influences within an organization, encouraging teamwork and unity throughout the process
Creating a vision	The creation of this vision serves as a roadmap for the change effort, developing strategies on how one is to undertake each phase of the change
Communicating the vision	Leader should involve key influencers from as many facets of the change process for their individual buy-in, communicating clearly and thoroughly throughout the process
Empowering others to act on the vision	It involves eliminating change obstacles, anticipating and looking ahead, focusing on the change systems and structures declining change. Risk taking is also encouraged in the form of activities and ideas
Planning for and creating short-term wins	Breaking up the over change initiatives into smaller manageable fragments that can be measured for completion and success. Leaders should be rewarded for their efforts leading to the overall change initiatives
Consolidating improvements and producing still more change	Focus is centered on change systems, policies, procedures that hinder the vision, hiring, promoting and developing subordinates who can implement the vision
Institutionalizing new approaches	Clarifying connections between new behaviors and organizational success. Leadership development and succession is also of significance

Figure 4 Kotter 8-step change model (Keow Ngang, 2019, p.53).

Step 1: Create a Sense of Urgency

Successful change starts with a strong sense of urgency. Many organizations fail at this stage because employees and leaders resist change, especially when the business is thriving. However, creating momentum early on is crucial to overcoming complacency and driving transformation. (Alaimo, 2022, p.42)

Step 2: Build a Guiding Coalition

Change requires support beyond senior management. A strong coalition should include influential individuals whose opinions are respected within the organization. Their leadership helps counter resistance and ensures broad alignment. (Alaimo, 2022, p.42)

Step 3: Form a Strategic Vision

A clear vision provides direction and purpose, distinguishing it from a simple mission statement. Leaders must communicate this vision effectively, allowing it to evolve as the change process unfolds. Without it, organizations risk confusion and lack of commitment. (Alaimo, 2022, p.42)

Step 4: Enlist Volunteers

Change advocates, or "evangelists," play a key role in spreading the message and persuading sceptics. Employees often trust their peers more than leadership, making internal advocates essential for gaining widespread support. (Alaimo, 2022, p.43)

Step 5: Remove Barriers

For change to succeed, obstacles—whether structural, cultural, or individual—must be addressed. Empowering employees with information and resources helps alleviate fears and fosters progress. (Alaimo, 2022, p.43)

Step 6: Generate Short-Term Wins

Change can be exhausting, so achieving and celebrating small victories is essential. These wins boost morale, validate efforts, and demonstrate tangible progress, keeping momentum alive. (Alaimo, 2022, p.44)

Step 7: Sustain Acceleration

After initial success, organizations must resist the temptation to slow down. Instead, they should build on achievements, maintain urgency, and expand involvement to embed change more deeply. (Alaimo, 2022, p.44)

Step 8: Institutionalize Change

To make change permanent, it must be ingrained in company culture. Aligning rewards, performance evaluations, and hiring practices with the new direction ensures long-term success. In some cases, organizations may need to let go of individuals resistant to change to reinforce commitment. (Alaimo, 2022, p.44)

3.4.1 Kotter's 8-step model implementation to customer service team

John Kotter’s eight-step change model was applied in the study where relevant. Inspired by the model, the team was informed about why automation was necessary and what benefits it would bring, such as increased efficiency and improved customer experience.

Some customer service team members participated in the implementation of the Order Handling Automation Project and the Loading Plan Automation Project. Additionally, the customer service manager led both change projects. Other individuals outside the customer service team, such as system specialists, were also involved. In line with Kotter’s theory, the change projects had a steering group that supported and facilitated the projects.

Both change projects had a clear vision and strategy. Their purpose was to define what the automation aimed to achieve and to create a step-by-step plan for implementing the change. Moreover, following Kotter’s theory, the customer service team was regularly and openly informed about the progress, objectives, and next steps of the change projects.

According to Kotter’s model, short-term wins should be highlighted, and small successes should be celebrated. As the automation projects progressed, the customer service team collectively came up with ideas for future change projects.

The team's confidence in the success of the changes strengthened as the projects advanced.

As the change progressed, some customer service team members became concerned about their future roles. Following Kotter's model, it was crucial to provide support and training for the team members throughout the change process. Additionally, uncertainties about new job roles needed to be clarified.

Kotter's theory emphasizes that change must become a fundamental part of the organizational culture. In these change projects, customer service team members actively identified areas for further improvement. Strong support from the company's management throughout the project played a crucial role in ensuring the success of the change initiatives.

3.5 Summary of Lewin's and Kotter's model on the change project

Utilizing both Lewin's model and Kotter's model provided different perspectives on implementing the change project. Lewin's model offers a simple, three-step structure for managing change, whereas Kotter's model provides a more detailed, step-by-step approach. Together, these models supported the initiation, planning, and completion of the change projects. Additionally, they provided practical guidance for navigating the different phases of the change process.

4 Implementing a customer service change process

Based on insights gained from the initial interviews, a decision was made to launch two automation projects: the order handling automation project and the loading plan automation project. These projects were identified as areas where automation could meaningfully support customer service operations and respond to challenges raised by employees. This chapter outlines the implementation of these automation change processes within the customer service team.

4.1 Current state

The customer service team has a broad role, but its most important task is to provide high-quality customer support. Based on the interviews, a current state analysis was conducted to identify the main processes and pain points in the team's operations. The most significant areas include quote and order handling, as well as the creation of loading plans. These core processes are illustrated in Figure 1 below.

The quotation process is handled together with the sales team, and depending on the product, other departments may also be involved. Once a customer approves a quote, it is converted into an order, which the customer service team then processes. This workflow spans multiple systems and requires a high amount of manual effort, consuming much of the team's time. Additional teams may also review the order at this stage, and communication is mostly handled through email or Teams discussions.

After processing, an order confirmation is sent to the customer by email. Changes can still be made after the confirmation. Following that, the product is either manufactured or picked from the warehouse. For almost every order, a manual loading plan must be created due to the complexity of the company's products in terms of size and weight. The loading plan defines packaging instructions, delivery costs, and transportation requirements.

The key challenges in the current state include fragmented processes, the use of multiple systems, and the heavy reliance on manual work. These findings served as the basis for identifying automation opportunities and designing more efficient workflows.

Figure 1: Main processes of the customer service team

4.2 Change management approach in Customer Service Automation

The client company applies a structured approach to managing change in the context of customer service automation. Before launching automation projects, cross-functional project teams are formed, including members from both the customer service and order processing departments. These teams are tasked with leading the change efforts, ensuring that all relevant perspectives are included from the start.

Project selection is guided by the priorities and input of the customer service team as well as by the anticipated impact on operational efficiency. The primary objective is to identify processes where automation could reduce manual work and streamline daily tasks.

Active participation from the customer service team is emphasized throughout the change process. Team members are involved in defining requirements, evaluating solutions, and participating in testing and piloting phases. This involvement helps to align the automation efforts with the realities of everyday work and increases the team’s sense of ownership.

Transparent communication is maintained through regular team meetings and project updates. Leadership is kept informed at key stages, supporting both strategic alignment and organizational commitment. This collaborative, inclusive approach is in line with widely accepted change management models, which emphasize early engagement, open communication, and continuous involvement.

Pirinen (2023) highlights that change succeeds only when employees are genuinely motivated, involved, and committed. If a company fails to inspire or engage its people, transformation efforts may remain superficial and fail to deliver long-term benefits. In this case, early involvement and proactive engagement have helped create a shared sense of purpose and strengthened the success of the automation initiatives.

4.3 Automation Projects Based on Interview Results

The customer service team has manual work steps that should be automated during the change process. Based on the interviews, two automation projects were started. One project is an automated order-handling process, and the second project is a loading plan automation project. The goal of the automation projects is to reduce manual work in the customer service team, making the team's work more efficient.

Order handling automation project

The Main idea of the order handling automation project is to automate the handling of orders automatically. This is done via a tool that handles manual work on the order-handling process. The automation project is done together with the company software team. The implementation will take place in phases, with the first section scheduled for April 2025. The second phase is done in Autumn 2025, but this master's thesis is focused on the phase one change project.

Loading plan automation project

The company's products come in different sizes and weights. All products are possible to deliver by truck. Different sizes and weights affect challenges when creating a loading plan. Currently, the customer service team creates a loading plan manually. This takes up several people's working time. This also affects mistakes when loading plans are done in a hurry.

The loading plan automation project’s main idea is to start using loading plan tools to get the loading plans. Loading plans should be made with each delivery. Loading plan automation projects are done together with a trainer who is finishing her master's thesis on this topic.

4.4 Impacts on the customer service team

Automating the order handling process also affects the customer service team. Workers have handled orders manually, but after the change, part of the orders are handled automatically. In the future, they plan to automate bigger parts of the order-handling process.

The workers who are working with the manual loading plan should, after the change process, understand how the automation tool works. Workers who have done many years of manual loading plans do not do it anymore. The worker's time is released to do other tasks on the customer service team.

Those changes may affect the fear of the customer service team. Team members have difficulty understanding why the company is making the changes and why the company doesn’t continue in the same way as before. Workers can also be worried about their workplace in the future. The key factor for success in this change process is that workers should be committed to the change process. That is the challenge of this thesis.

5 Development Plan for Customer Service Automation Process Implementation

This section explores the root causes of the current state that led to the introduction of automation as a solution. It also outlines the desired objectives and how a well-managed change process can support reaching them. Furthermore, it describes how the implementation of automation should be planned and considers whether lasting improvements can be achieved through successful change management and automation.

5.1 Current state root causes

Order processing and creating loading plans require a significant amount of manual work time. Both work phases are inefficient. In manual processes, there

is a high risk of errors, which take time to correct and result in additional costs for the company. These issues were highlighted by employees during the initial interviews conducted for this study (see Appendix 1).

5.2 Development Objectives

To address the challenges faced by the customer service team, the decision to automate the customer service order handling process was made by the management team, in collaboration with the customer service team members. Automation will help eliminate manual tasks and improve communication in processes involving multiple teams. The goal of automation is to reduce the risk of errors and improve the efficiency of the workflow. In the first phase, the order handling of spare parts orders and the creation of loading plans will be automated. This decision was driven by the need to streamline operations, reduce human error, and ensure faster processing times, ultimately benefiting both the team and the customer experience.

Spare parts orders are small orders and entering them into the order management system takes a significant amount of time. It has been decided that, in the future, the processing of spare parts orders will be handled by an order processing robot. The robot will manage the entire process of spare parts orders, from order entry to delivery to the customer. If the robot for spare parts order processing works successfully, it will be possible to expand its use to other orders within the customer service team in the next phase. However, it is decided to implement the order processing robot gradually.

The decision to automate the loading plans was made by the management team, in collaboration with the IT department and the customer service team. An AI-based tool will be used to automate the loading plans. This tool will automatically create loading plans for each order, and as it is based on artificial intelligence, it will continue to learn and improve over time. The decision to implement this automation was driven by the need to reduce manual workload, improve accuracy, and speed up the planning process. The use of AI ensures that the

system becomes more efficient and accurate over time, ultimately improving operational efficiency and reducing errors.

5.3 Implementation

After the change management approach was defined and project teams were established by the senior management team, with input from key stakeholders in the customer service and IT departments, the company transitioned into the implementation phase. This phase focused on the practical execution of two automation initiatives: the order processing robot and the loading plan automation tool. Both projects followed a structured process, including planning, specification, testing, deployment, and user training. The decision to move into the implementation phase was driven by the need to improve efficiency, reduce manual tasks, and ensure that the customer service team could effectively integrate the new systems into their daily operations.

5.3.1 Order Processing Robot Automation

The implementation of the order processing robot began with the development of a detailed plan outlining the scope and method of automation. Several system providers were evaluated, and a partner was selected based on their experience in similar projects and their ability to provide a tailored solution. A cooperation agreement was signed to initiate the project.

The project proceeded with a specification phase, where the robot’s actions and logic were carefully defined. This phase involved not only the customer service team, but also other departments connected to the order-handling process. Due to the high degree of manual variation in current practices, defining a consistent and programmable workflow took longer than anticipated.

Following the specification phase, the robot was programmed by the selected provider. During development, continuous communication was maintained between the provider and the project team to ensure that the solution aligned with operational needs. Testing was conducted in two phases: first in a test

environment and later in the production environment. Both phases involved iterative adjustments to address identified issues.

Once testing was completed, the robot was deployed into full production use. The customer service team received training, and comprehensive documentation and user guides were prepared. In the initial months following deployment, the robot performed reliably, significantly reducing manual workload. Encouraged by the positive results, the company initiated planning for a follow-up project to expand the robot's use to additional order types.

5.3.2 Loading Plan Automation

The loading plan automation project began with an assessment of the input data required for automated planning: product dimensions, weight, volume, and packaging information. A key challenge in this phase was the variability and sensitivity of the company's products, which required accurate and complete data.

Several software providers offering loading plan tools were considered. A Finnish provider was selected due to their willingness to develop a customized solution that addressed the company's unique needs and aligned with its long-term development goals. A cooperation agreement was signed, and development began promptly thereafter.

The system provider worked closely with the company to define and implement the tool. Integration into the existing system architecture ensured smooth usability for the customer service team. A prototype version of the tool was tested under real-world conditions, and feedback from the testing phase was used to refine the system. After launch, updated documentation and user training sessions ensured a smooth transition to daily use.

5.3.3 Change Communication, Outcome Monitoring and Measurement Practices

Consistent communication played a crucial role throughout the implementation phase. Regular updates and the involvement of relevant employees helped keep the entire team informed and engaged. Open dialogue reduced resistance to change and fostered a sense of ownership among those impacted by the new systems. Transparency and early user involvement laid the groundwork for the successful adoption and sustainable use of the automation tools.

Following the deployment of the automation solutions, the focus shifted toward monitoring outcomes and refining measurement practices. The customer service team began actively evaluating the effects of automation, with particular attention to what new metrics had been introduced or adapted.

Prior to automation, customer service relied on a set of existing metrics to monitor efficiency and forecast demand. However, many tasks, especially those involving manual planning, such as loading plans, lack clear time-based data, making performance evaluation difficult. The automation of these tasks, particularly through the loading plan tool and order processing robot, enabled seamless data integration with existing systems. As a result, measurements improved significantly, with real-time data becoming part of the team's standard reporting.

The new tools provided better insights into time allocation, allowing the team to monitor how work was distributed and processed. Metrics such as the number of orders handled by the robot and time spent on automated versus manual tasks now support ongoing analysis and help track the impact of the changes. These developments have become an integral part of daily operations and long-term process optimization.

5.3.4 Evaluation and Benchmarking

Efficiency metrics are used in evaluating the automation projects, comparing the speed of work before and after automation. This metric is used to assess both

time savings and process improvements. Additionally, the time spent handling spare parts orders is compared before and after automation. The changes in time usage brought about by the loading plan tool are also evaluated.

Order handling the automation process

Table 2 below shows the time spent on processing spare parts orders before and after the transformation. Previously, each order required an average of 15 minutes to process. This has been reduced to just 3 minutes per order following the project. This 80% reduction in processing time highlights the substantial gains in operational efficiency achieved through the project.

Action	Avarage worktime before chance process (min)	Avarage worktime after chance process (min)	Efficiency improvement %
Spare part order handling	15	3	80

Table 2: Spare part order handling process before and after the change process

Loading plan tool automation process

As shown in Table 3, the time required to create a loading plan has been drastically reduced, from approximately 30 minutes before the transformation project to just 3 minutes after. This 90% reduction in planning time demonstrates the powerful impact of automation on operational efficiency.

Action	Average worktime before chance process (min)	Average worktime after chance process (min)	Efficiency improvement %
Loading plan	30	3	90

Table 3: Loading plan tool metrics before and after the change process

5.4 Follow-up: Insights from Interviews

The second phase of the interviews was conducted after the change project. The interviewees were informed about GDPR requirements. The interviews were

conducted anonymously, ensuring that the participants could not be identified through their responses. The interviews in the second phase play a crucial role in evaluating the impacts of the automation projects. They provide deeper insights into how the customer service team members perceive the change and how the effects of automation have manifested in their daily work.

5.4.1 Employee Experiences and Development Based on Feedback

The interviews indicated that the customer service team had a generally positive attitude toward the changes introduced by the automation projects. The team was actively involved in various stages of the implementation, which contributed to a sense of ownership and engagement. One of the most appreciated improvements was the automation of loading plans, which had previously been time-consuming and burdensome.

However, the introduction of the order-processing robot initially created some uncertainty within the team, a common reaction during major changes. The importance of training and continuous support was highlighted in the interviews, as these were key in ensuring a smooth and efficient integration of the robot into daily operations.

Team members also provided suggestions for further improvement. These included fine-tuning certain processes and potentially expanding the robots' capabilities in the future. Based on this feedback, follow-up actions have been planned, focusing on process optimization and broader utilization of automation technologies.

6 Results

Next, the success of the work will be reviewed in terms of the research questions. The success will be assessed based on the research questions presented at the beginning of the study.

6.1 What are the root causes of customer service's current state (CSA), and how can they be resolved with the help of automation?

The assessment of the current state of customer service revealed several root causes that have impacted operational efficiency and smooth workflow. The following subsections examine these key issues in more detail and explore possible solutions to improve and streamline customer service operations.

6.1.1 Root Causes of the Current State in Customer Service

The operations of the customer service team were inefficient, with many tasks in the daily workflow performed manually. This situation is largely because no significant updates or changes have been made to the customer service processes for a long time. As a result, workflow efficiency and productivity have been negatively affected.

Interviews conducted during the first phase revealed that the need for change had been recognized for some time. Although small corrective actions had been attempted within the team, they had not resulted in meaningful improvements in daily operations.

The interviews also clearly showed that customer service team members are eager for change and willing to work towards it. At the same time, there was concern about whether the ongoing change project would be sufficient. This skepticism appears to stem from previous unsuccessful changes within the team.

6.1.2 How Root Causes Can Be Solved

The daily work of the customer service team can be streamlined through automation. Many of the current tasks involve manual steps that can be efficiently handled by automated processes. In this study, the order handling process and the creation of loading plans were selected for automation. These were the most resource-intensive areas involving manual work. With automation, the time and

expertise of customer service personnel can be better focused on their core competencies.

6.2 How should be deployment process of automation be planned and implemented effectively?

The success of automation projects depends not only on the technology used but also on how well the deployment process is planned and managed. This chapter presents the key factors that contributed to the effective implementation of automation in the customer service context. The insights are based on practical experiences from recent automation projects and reflect both challenges encountered, and lessons learned.

6.2.1 Project Foundations: Clear Roles, Goals, and Working Models

One of the most important success factors identified in the automation projects was involving the right people. Every member of the project team should have a clearly defined role and area of responsibility. This clarity ensures accountability and enables smoother collaboration. In addition to clearly defined roles, each automation project must have a concrete goal, a realistic schedule, and a structured working model. In our projects, the timelines were tight, which increased the pressure on the team. However, maintaining regular project meetings proved effective in keeping things on track and allowed us to address issues early before they escalated.

6.2.2 Ensuring Alignment: Internal Needs and External Collaboration

A successful automation project requires not only internal clarity but also strong collaboration with external solution providers. Choosing the right partners is critical, and companies must communicate their goals, expectations, and preferred implementation approach. In our case, cooperation with two automation vendors was smooth and flexible, significantly contributing to the positive outcome. Poor collaboration could have led to very different results. It’s equally important that automation solutions meet the real, day-to-day needs of the

customer service team. The goal should be to reduce workload, not to introduce additional complexity. The processes must be tailored to provide practical value to those executing them.

6.2.3 Planning, Specification, and Testing as Critical Success Factors

Thorough planning and detailed specification work at the beginning of the project turned out to be essential for success. Although this phase felt tedious at first, it became clear that solid groundwork led to greater efficiency later and minimized the risk of misalignment or delays. By identifying potential issues early, we were able to address them proactively and avoid costly changes at the production stage. Equally important was the testing phase. In the order handling automation project, go-live testing was delayed, shortening the original testing period. Nevertheless, we chose to postpone the launch to ensure proper testing could take place. This proved to be the right decision, as multiple issues were uncovered and resolved that would have been far more difficult to fix in a live environment.

6.3 Can automation, a well-executed change process, and well-managed change of automation deployment improve efficiency?

The automation projects led to significant reductions in the manual workload of the customer service team. The processing time for spare part orders improved by 80% thanks to the automation tool, and the efficiency of creating loading plans increased by 90%. These tasks are now completed much faster due to significantly shorter lead times, bringing clear benefits to daily operations.

The change process within the customer service team was successful. Throughout both projects, the team members remained committed to the changes and participated actively in developing new ways of working. As a result, the changes were well accepted after implementation, and no significant resistance to change was observed.

During the automation projects, the customer service team was regularly informed of the progress. Likewise, any bottlenecks were communicated transparently to the client company’s management. The strong engagement of the customer service team was a key factor in completing the projects on schedule.

Management support also played an essential role. Throughout the change process, the client company's leadership remained actively involved and showed interest in the project's progress. Their commitment provided a framework that enabled the successful delivery of the automation initiatives.

In conclusion, the implemented automation projects were successful and brought significant value both to the customer service team and the client company. A well-executed automation deployment can deliver measurable time savings and operational improvements.

7 Conclusions

The automation and change projects carried out in this study aimed to improve the daily work of the customer service team at the client company. Beyond the measurable results, the process offered valuable insights into project management, change implementation, and team engagement. This final chapter reflects on the original goals, what was learned during the transformation, what could be done differently in the future, and how the project can be further developed.

At the beginning of the transformation project, I promised to improve the efficiency of the client company's customer service team. The objective was to reduce manual workload and streamline daily operations through automation. To ensure that the solutions addressed real needs, I involved more experienced team members in the information gathering phase by interviewing them and inviting ideas on how to improve operations. After completing the transformation, we achieved our goals: the team's work became significantly more efficient, and

manual tasks were substantially reduced. A follow-up survey conducted after the changes confirmed that the improvements had been effective and beneficial for the team.

One of the most important lessons I learned was the critical importance of engaging the customer service team in the change process. When team members are involved from the beginning and play an active role in the transformation, change becomes easier to accept and implement.

Communication throughout the project was also vital. Although it sometimes felt unnecessary to communicate when there was little new information, the feedback received afterward from the client company confirmed the importance of consistent communication during all stages of the process.

I also realized that people react to change in different ways and at different speeds. It’s essential to give individuals space and time to process change and to ensure that supervisors are present and supportive throughout. Some team members experienced difficult moments during the change process, and leadership support was crucial during those times.

Planning is the most important phase of any automation project. The more thorough the early-phase planning and technical specifications, the smoother the later stages of implementation. Although the planning phase initially felt time-consuming, it turned out to be the key to efficiency and clarity later in the project.

The project timeline was very tight. However, by establishing common rules and goals at the beginning, the team was able to stay on track. From this, I learned that having a shared goal and a communicated schedule is critical for success.

If I were to repeat these transformation projects, I would invest even more effort in the planning and specification phase. Although this phase can feel tedious, its benefits are undeniable during execution.

I would also allow more time for the project timeline or consider spreading the projects more evenly throughout the year. Conducting two major automation projects simultaneously added considerable pressure to the team and the schedule.

These transformation projects inspired the client company to examine its processes and ways of working more broadly. The work done is just the beginning of a larger transformation journey.

The order handling process will be expanded to include other order types beyond spare parts. The success of this project demonstrated both the need and interest in automation at the company.

The implementation of the loading plan tool brought substantial improvements to the daily work of the customer service team. The automation partner is also committed to developing the tool further. As the team gains experience using the tool, it will be refined to better meet their specific needs.

Customer service processes, order handling, and customer expectations are constantly evolving, as are the company's products. The organization must continue to adapt its service models and automation tools to meet these changing needs. This project has proven that automation can solve real operational challenges and provide meaningful improvements to business performance.

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Appendices

Interview questions, part 1

- How do you see the current stage of the customer service team?
- How do you feel about the upcoming change in your organization?
- What concerns you the most about the change?
- About the new company strategy, how do you see the new strategy from a customer service point of view?
- What things come to mind when you hear the word change?
- What do you think are the most important things in the changing process?
- People lead and change the process. What are your first thoughts about that?
- What will be the future trend in customer service?
- Do you see that customer requirements have been changed, and if yes, how?

Interview questions, part 2

- How do you feel the transformation projects were successful?
- What kind of challenges did you encounter during the transformation projects?
- How did the work in the transformation projects feel?
- Did you feel that you received enough support from your supervisor and the organization during the transformation projects?
- Do you feel that the transformation projects benefited the company and the customer service team?
- After the completed transformation projects, what is your attitude towards the idea of further transformation projects in the customer service team in the future?
- What kind of development ideas were sparked by the transformation projects?