

Jennifer

If you can let us have a copy we can see if it is appropriate for the manual.

Regards

Lesley

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Jennifer Robson
25/07/2005 15:16

To: Lesley Cartwright/e/POSTOFFICE@POSTOFFICE
cc: John Legg/e/POSTOFFICE@POSTOFFICE, Kevin
Gilliland/e/POSTOFFICE@POSTOFFICE, Paul F
Williams/e/POSTOFFICE@POSTOFFICE, Stewart Barclay/e/POSTOFFICE@POSTOFFICE,
Victoria Noble/e/POSTOFFICE@POSTOFFICE
Subject: Re: TC and BT and the 42 week issue

Sorry I cannot really comment not having seen the franchise manual.
I am preparing a comms(for the IMPACT team) which Colin Baker asked for at
a recent meeting to share the new DR processes.
This will show the debt recovery process at a lower more detailed level (
including disputes and discrepancies where a TC is due) than the training
manual/ videos etc.
Not sure if this would help you to assess any potential changes required
for your manual.
Let me know if you need a copy.

Regards

Jennifer

Debt Recovery Section manager
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Lesley Cartwright

25/07/2005 11:57

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Subject: Re: TC and BT and the 42 week issue

Paul/Stewart

I would have thought we need to look at the accounting section to ensure that references are to Branch Trading and not Cash Account.

Regards

Lesley

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Paul F Williams

22/07/2005 12:56

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Subject: Re: TC and BT and the 42 week issue

Lesley / Jennifer

Is there anything we need to put into the Franchise Manual [Franchise Operations Manual update] Stewart and I have been working on?

Paul Williams

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11/07/2005 15:38

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Gilliland/e/POSTOFFICE@POSTOFFICE, Paul F

Williams/e/POSTOFFICE@POSTOFFICE, Victoria Noble/e/POSTOFFICE@POSTOFFICE

Subject: Re: TC and BT and the 42 week issue

Jennifer

The franchise agreement can only be changed at renewal stage but would not need a change anyway as the agreement is very general and indicates that they have to maintain and operate the accounting system provided by the Franchisor .

However, I would suggest that it is a communications issue; prior to and at the time of introducing Branch Trading, partners need to be advised that this is a mandatory change to the branch accounting system provided by the Franchisor and all instructions should be clear and not open to interpretation.

Regards

Lesley

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Jennifer Robson

11/07/2005 10:20

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Williams/e/POSTOFFICE@POSTOFFICE, Victoria Noble/e/POSTOFFICE@POSTOFFICE
Subject: Re: TC and BT and the 42 week issue

The issue is around the branches responsibility to roll branch trading at the appropriate time. I think we need to be clear that failure to do so will lead to the corrective action process in the service teams (where warnings are given and ultimately suspension).

Is it necessary for a contractual reference or is it sufficient to use existing processes for managing this non conformance?

Regards

Jennifer

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Kevin Gilliland
11/07/2005 09:25

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Williams/e/POSTOFFICE@POSTOFFICE, John Legg/e/POSTOFFICE@POSTOFFICE,
Lesley Cartwright/e/POSTOFFICE@POSTOFFICE
Subject: Re: TC and BT and the 42 week issue

Vicky,

Is the contractual issue, what action we take if a sbpmr refuses to make good a loss? If so, under the contract the sbpmr is obliged to make good losses without delay. However, we may want to make this clearer ie. demonstrating that we will act responsibly by eg. providing evidence where applicable; and spelling out that the loss must be made good within x time period.

Paul will be the main contact from my team for this - with Lesley feeding in on the franchise contract.

Regards,

Kevin

Head of Network Strategy

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Victoria Noble

07/07/2005 16:59

To: Kevin Gilliland/e/POSTOFFICE@POSTOFFICE

cc: Jennifer Robson/e/POSTOFFICE@POSTOFFICE

Subject: TC and BT and the 42 week issue

Kevin,

Please see the email below which I have sent to Lynn following a meeting we had last Wednesday. I think we could do with looking at the contract situation with Postmasters again once IMPACT has been implemented especially in relation to my final bullet point which I have highlighted below. Could you let Jen and I know what you think and we will be more than happy to assist in reframing the contract to reflect the changes in processes.

Thanks and regards

Vicky

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----- Forwarded by Victoria Noble/e/POSTOFFICE on 07/07/2005 16:44 -----

Victoria Noble

07/07/2005 16:44

To: Lynn Hobbs/e/POSTOFFICE@POSTOFFICE

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Carole Cross/e/POSTOFFICE@POSTOFFICE, Carol King/e/POSTOFFICE@POSTOFFICE,
Steve Grayston/e/POSTOFFICE@POSTOFFICE
Subject: TC and BT and the 42 week issue

Lynn,

Firstly, thanks for the talk through yesterday. I think it helped to clarify things in both our minds as well as raise a number of questions which we need to progress.

The following is an attempt at a "brief" summary of what we agreed in order to allow us to move forward on the process for when a postmaster does not roll his BT due to having outstanding TCs which he has an issue with.

The summary of what we agreed is as follows: (as discussed there will be some nuances around this)

investigation in P&BA identifies a difference that requires a TC to be sent to a branch (this has to be done to a standard that allows the branch to understand the basis for the TC and how to action it appropriately). Branch receives TC and actions appropriately via the following options "accept and make good", "request more evidence"(if this option is available) or "accept and settle centrally".

If the branch does nothing - it may be followed up by P&BA if it is high value (though this process has yet to be discussed and defined)

Branch has TCs outstanding - (for whatever reason) at the time it is due to do the BT and therefore does not roll his BT

NBSC identify branches that have not rolled their BT and contacts them ask why

NBSC contacts P&BA if the reason branch has not rolled is due to outstanding TC

if it is identified that the branch is querying a TC then it will be referred to P&BA to resolve and the service line to put them on stand by if a visit or other action is required

P&BA will investigate and at this point (or at the point when the BT is due to roll) if there are still TCs outstanding then as a matter of EXCEPTION only we can agree that the TC is actioned by the "settle centrally" option with an agreement on how to resolve, and by when, and the investigations required to agree the final action.

if P&BA cannot resolve and there is still an issue that means the branch refuses to roll the BT then it has to become a point of escalation to the service line to action.

I think we need to be clear about a number of points here to provide direction to our teams on roles/responsibilities and accountabilities so we don't trip over each other or have gaps:

we do not at this stage know what the Postmaster behaviours are going to be so it will be difficult to estimate resource required for this the Service team are responsible for acting as an escalation point only and NOT to chase up outstanding TCs which are outside of this process - (this is to free you up to support the Sales teams, and we see this as our role in support of the Sales teams)

these processes will need to be reviewed in the light of experience post implementation of IMPACT

that we should set up a joint working party with all key parties from Service line, NSBC and P&BA to work through the issues arising and make recommendations for future changes etc., as well as day to day working that the processes for informing and resolving Service team and P&BA of issues where branches have not rolled their BT has to be slick (a few days only) especially during a 5 week period when the BT will be run on day 35 leaving only 7 days till day 42

That we consider in the P&BA processes not to issue TCs in the week in which a branch is doing its BT (i.e. Mon/Tue/Weds/Thurs) that we still need to agree what we intend to do if a branch (after intervention of the Service line) still refuses to accept a TC.

I think this covers everything Lynn, and that we can move forward with this and get it implemented, understanding that it will most probably need some refining once we get to using it and have more experience.

Can you confirm to Steve Grayston your acceptance of this so we can close it as an issue and talk to the NFSP on the 11th July.

Thanks and regards

Vicky

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