



Branch Support Programme Update

Network and Sales Lead Team Meeting

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Branch Support Programme -Background

To address the concerns of some subpostmasters over recent years about Horizon, the Post Office commissioned forensic accountants, Second Sight in 2012 to undertake an independent review of the cases.

The interim report was published in July 2013 and whilst the report identified that there were no systemic issues with the Horizon system, it suggested that Post Office should examine the training and support offered to its subpostmasters.

As a result the Branch Support Programme was established to review the lifecycle of the subpostmaster's experience with Post Office; to "fix" the issues identified in the Second Sight report and the subsequent mediation cases and to ensure any lessons learnt are factored into future ways of working.

A LEAN approach is being used to map the critical business processes within the scope of the 9 programme work streams to ensure that the most cost effective process is delivered to reduce non-value add activity. High level mapping has identified a 40% reduction opportunity in network support costs ie c.£3m pa. This methodology also helps to embed the principles of continuous improvement within the relevant work areas.



Branch Support Programme - Purpose & Guiding

Principles

Purpose

The purpose of the Branch Support Programme (BSP) is to improve the effectiveness and efficiency of the support we provide to our subpostmasters and operators in the running of their Post Offices from an operational and engagement perspective.

Guiding Principles

There are three guiding principles that underpin our new ways of working approach and how we interact with our Subpostmasters and others. These principles should be embedded in all areas of the Post Office. The outputs of the Programme will be tested against each of these principles:

- **Treat with dignity & respect at all times**
- **Stand in Spmr's shoes**
- **Right first time**

Branch Support Programme - Scope

The focus of the Programme is predominately how the Post Office supports the agency network and the policies and processes that impact on the subpostmaster.

In Scope:

- Crown – where the touchpoints are the same for the Crown network then these are in scope
- Cash management
- Finance Service Centre (FSC)
- NBSC
- Training – design & delivery
- Audit – design & delivery
- Communications
- Structure design for the network and admin support function touch points
- IT
- Spmr/operator selection process
- Spmr contract breaches
- Sales support – delivery methods

Out of Scope:

- Crown network as an entity
- Supply Chain as an entity
- NTP as an entity
- Wider business organisational design



Branch Support Programme – Quick Wins

- **Branch User Forum** - fully established with representation from 6 subpostmasters, 1 Crown branch manager and 1 Crown colleague
- **Spmr Contract Breach** - revised approach to suspensions and additional type of contractual action (suspended termination) implemented
- **Branch Support** - improved support process put in place with Branch Support to assist branches with balancing/accounting issues and losses
- **Balancing Support** - aids and support tools launched for the training of new subpostmasters
- **HORIce** – pilot of Horizon Information Centre tool designed to identify potential fraudulent activity or non-conformance to enable earlier intervention
- **On-line training** - development of on-line platform for new entrants to complete regulatory compliance training
- **NBSC** - plan in place to review call categorisation and undertake pro-active support activity to reduce volumes caused by specific issues or individual branches
- **FSC** - plan in place to introduce standard ways of working, align processes with guiding principles of Branch Support Programme and improve how they communicate with branches both verbally and in writing



Branch Support Programme – 14/15

Implementation

- **Revised on-line subpostmaster appointment** – to ensure that Post Office attracts and recruits the right subpostmaster at a time when the network is undergoing its biggest physical transformation in history.
- **Replace the majority of new entrant classroom with on-line training** - 80% reduction in classroom training course content for new colleagues and subpostmasters with on-line learning modules.
- **Re-writing Horizon processes** - to reduce the rate of errors and losses will deliver both a financial and a resource benefit in chasing those errors
- **Introduce a Customer Management System** - delivering a consistent IT platform for those teams supporting branches will enable operating cost reduction benefits to be realised.

Branch Support Programme – Next Steps

- Branch Support Programme is one of the 7 strategic programmes on Transformation Committee roadmap
- Branch Support Programme business case to POLIC 16th May 2014
- Branch Support Programme steering group established & meeting terms of reference agreed
- Branch Support Programme alignment with Business Transformation Programme confirmed

Scope of the work streams

Work stream	Owner	Objective	Level of change required
Training	Julie Thomas	To provide co-ordinated, flexible, effective training to post office branches, delivered by highly trained individuals supported by a multi-channel approach.	<p>Full review of who, where, when, what and how we train our branches. Includes IT development and structure review.</p> <p>Business change processes for delivery of training</p> <p>People change required for delivery of training and the accountability</p>
Communications	Richard Weaver	To ensure all of our communications are personal, simple, co-ordinated, relevant, accurate and timely. They must also be signed off by a release authority, be measurable and visible to all.	<p>Full review of how we interact with branches and development of new channels or materials to support that interaction.</p> <p>Specific communications to support the visions of the other work streams.</p> <p>Cultural change to embed the principles across the business</p>
IT	Peter Prior Mills	To provide effective support and meaningful MI to colleagues, customers and clients, enabling sales and improving support	<p>Transaction processes to make things easier for customers and branches</p> <p>Tools for branches to access help and support, and to improve the experience</p> <p>Tools and systems for internal teams to support and record contact</p> <p>Systems and MI in place to reduce inefficiency among teams</p> <p>Behaviour to support new ways of working</p>

Scope of the work streams

Work stream	Owner	Objective	Level of change required
Pre-appointment process (agents)	Craig Tuthill	To ensure our agents are consistently informed, supported, knowledgeable, confident and feel part of Post Office Ltd. To ensure that our leavers in this process also feel informed, supported and valued.	<p>The information that is provided to applicants and how we share that</p> <p>How we support people through the process, both from a structure and behaviour process</p> <p>The process of how we recruit agents</p> <p>The process of how we support agents leaving</p>
Operational support	Kendra Dickinson	To ensure consistent, quality, efficient and co-ordinated support is provided to branches to ensure they can serve customers effectively and have their issues resolved in a timely and quality way.	<p>Structure of the operational support model and change in business process</p> <p>Development and deployment of tools and technology to support the model</p> <p>Way we deal with suppliers</p> <p>Streamlining of transactions causing business inefficiency</p> <p>Behaviour towards our branches</p>
Physical support model	Pam Heap	To engage and support our branches effectively to ensure great customer service is provided and business growth.	<p>Structural review of support and necessary transition including recruitment, assessment and transition</p> <p>Roles and responsibilities, including behaviours</p> <p>Development of different skill sets</p>

Scope of the work streams

Work stream	Owner	Objective	Level of change required
Leavers process	Craig Tuthill	To ensure that quality and consistent support is provided to branches, issues are investigated before contractual decisions are made and agents supported during the exit process and	<p>Review of the suspension process, policy and contractual approach</p> <p>Behavioural change in how we treat agents with issues</p> <p>Structural change to support processes</p> <p>Approach to how we support agents with issues with</p>
HORIce (Horizon Information Centre)	Gayle Peacock	To improve the quality and timeliness of data available to teams within Post Office, to ensure issues and problems are identified early and rectified.	<p>The data and processes teams use to identify branch issues and the root cause of the issue.</p> <p>How we use the data to make interventions to either prevent or stop non-conformance and/or fraud</p>
Regulatory Compliance Training	Gayle Peacock/Paul Hawkins	To migrate Regulatory Compliance from Horizon to a web-based solution with a view to deliver a more relevant, engaging method of training	<p>Introduction of an on-line system for new entrants</p> <p>Migration of training from Horizon to web-based solution</p> <p>Development of risk-based training and processes, rather than one-size fits all</p>