

Retail Compliance Team Meeting 18 July & 19 July 2023

Attendees

Tracey Harris, Jane Lawrence, Victoria Gill, Debbie Simms, Gurmeet Mudan, Crag Bros-Winks, Claudette Beaney, Julie Betteridge, Satti Sykes, Natalia Anderson, Junaid Tanveer, James Speirs, Glen Morris, Anne Sampson, Barbara Anne-Doherty, Irshad Kakuji, Denise Butterworth, Bea Kuruppuarachchi, Mica Wallhead, Mehl Singh, David Nolan, Bronwen Thomas, Clive Serplus, Leander Fitzharris, Glenn Chester, Steve Utting, David Southall, Nayan Navik, Pete Marsh

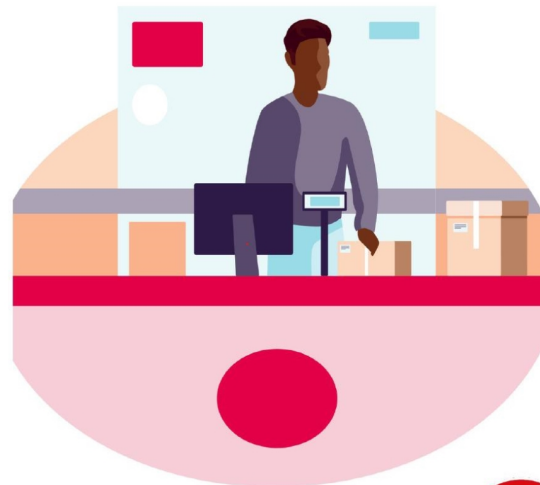


The Why

In all our dealings with postmasters and their staff we need to be demonstrating the right behaviours, putting ourselves in the postmaster's shoes. The purpose of the team meeting was to benchmark what we do as a team and, importantly, how we do it

We wanted to build on the retail plan and reemphasise that we're here to support postmasters by catching them doing things right

Our takeaway had to be that it needs to be clear that the jobs we do as a team now isn't what it was. This was to be achieved through a look at the team culture and a deep dive into our ways of working.



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The How

Sessions covered:

- Inquiry Focus – watched key evidence from the Inquiry and made it relevant to what we do as a team now
- Team purpose - benchmarking what we did by using the team understanding as to what we thought we should be doing, and what a postmaster thinks we do.
- In branch experience and what good looks like - understand what good looks like before during and after a branch visit, view what we do from the postmaster perspective
- Visit reports – reviewing how we report on visits with the view of starting over to get the best report for the postmasters and for us.



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Key Takeaways and Next Steps



As a team we're clear what good looks like in our dealings with postmasters – putting ourselves in their shoes.

Work is needed on clarity of role for the team – we need to be clear as to what our role is. This will be defined in a 'Team Charter' to be in place by the end of Q2

To support the team further a refresh of the 'chapters' is needed setting out not just the what to do during a visit but also how to do it.

The Branch Visit report needs repurposing to make it clearer to a postmaster what the ask is as well as better capture themes and trends for ongoing monitoring. This will be in place for the end of Q2.

All of us to be provided further support through the completion of two modules – Creating a Customer Service mindset and Developing Communications and Resolution Skills. These will be added to SuccessFactors and monitored to completion through 121.