



Topic 1: Operational Excellence Visits

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Executive Summary

- Area Manager led Operational Excellence Visits are designed to provide a consistent approach to branch visits, with the main aim to reduce discrepancies across key operational measures.
- Launched in July 23, over 5k visits have been conducted across branches identified and prioritised using NORM data.
- Feedback from Area Managers indicates this approach provides clarity and provides clearer structure to their visits, with supporting content to further enhance the support and knowledge they provide branch teams.
- Early findings have shown positive impact of new approach, with reductions seen across average value of discrepancies across all focus areas. Further analysis is required to understand longer-term impact.
- Whilst these findings are positive, further work and resource is required to fully leverage these visits in supporting the wider operational excellence programme, including the right tools, platform and enhanced data.



Ops Excellence visits provide a consistent, data-led approach to branch visits with the ability to flex key drivers based on business requirements

5029

visits since July 23
(3794 unique)

Key Topics Covered

Cash decs
Excess Cash
Transaction
Corrections
Discrepancies

Other Ad-hoc Topics

Lottery

Purpose

- Optimise branch performance
- Ensure consistent operational standards
- Targeted visits driven by data

Approach

- Provide field team with credible data
- Educate and support with richer content
- Clear feedback loop back into central teams

Feedback

“Visits feel focused, giving more time to coach and better understand the barriers”

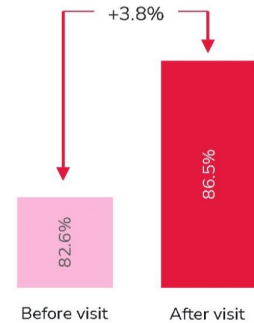
“Support tools give more knowledge (love the videos with the subject experts)”

“Making Postmasters lives easier by helping them run their branches more efficiently”

Results

Cash Declarations

Percentage

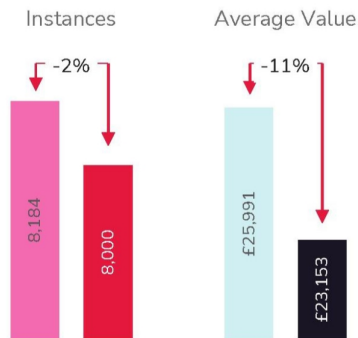


In the 30 days after receiving a visit the percentage of cash declarations by branches had increased by 3.8%

Operational Excellence AM visits – early findings

There is clear value identified from the tactical Operational Excellence visits starting to come through, however more work is required to improve the end-to-end process of Operational Excellence and how these AM visits support a wider programme across all areas of retail

Average Excess Cash



In the 8 weeks after receiving a visit the number of instances of excess cash had reduced slightly by 2% however, the average value had decreased by 11%

Circ. £27.5m excess cash returned from network following visits

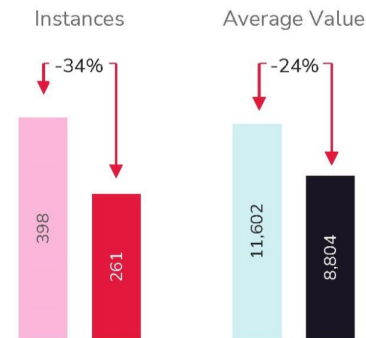
Transaction Corrections



In the 60 days after receiving a visit the volume of transaction corrections had increased by 16% however, the average absolute value had reduced 26%.

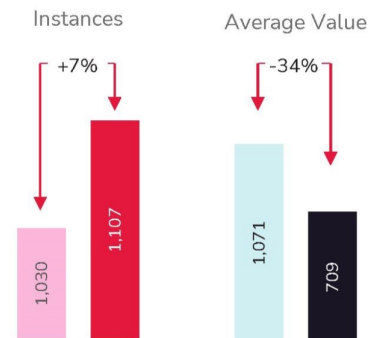
Circ. £0.73m reduction in value of corrections

Review/Dispute Discrepancies



In the 2 periods after receiving a visit the volume of discrepancies raised via Review / Dispute had reduced 34% and the absolute value had reduced 24% [1]

Discrepancies Settled Locally



In the 2 periods after receiving a visit the volume of discrepancies settled locally had increased 7% and the absolute value had reduced 34% [1]



[1] Comparison based on data from 2 period timeframe to show indicative results

Next steps

1

Continue to refine visit approach to capture useful insights, and to drive PM confidence and behavioural change

2

Work to up skill AM and BSM team knowledge, and create bite-sized content to support actions post visit

3

Create more clearly defined next steps and action plans post visit to drive interventions (training, follow up, etc)

Continue monitoring results to understand longer term impact of these visits

Appendix – Operational Excellence Regional Breakdown

	Cash Declarations	Average Excess Cash		Transaction Corrections		Review/Dispute Discrepancies	
Region	% Movement	Instances	Avg Value	Instances	Avg Value	Instances	Avg Value
David Atkins (R01)	4.3%	-19%	-25%	-2%	-52%	-19%	-69%
Rachel Lawler (R02)	3.4%	8%	3%	12%	35%	-17%	75%
Craig Perrins (R03)	2.5%	-2%	-18%	10%	-27%	-45%	-71%
Donna Poulter (R04)	2.8%	-3%	-17%	36%	-20%	-60%	80%
Tony Sanghera (R05)	3.2%	5%	2%	12%	-32%	-72%	66%
Nick Carroll (R06)	3.7%	3%	-9%	32%	-67%	-31%	-77%
Andy Parker (R07)	3.5%	3%	-9%	24%	-15%	-28%	66%
Paul Mead (R08)	5.5%	8%	-8%	24%	-81%	-11%	0%
Lynn Lewis (R09)	4.7%	2%	-11%	6%	52%	-34%	-78%
Manish Mehta (R10)	5.7%	-5%	-14%	8%	2%	-35%	-40%
Lesley Macneil (R11)	5.5%	-19%	-31%	7%	9%	-29%	-59%
Debbie Mickleborough (R12)	1.3%	-8%	-9%	19%	22%	-6%	264%
Total	3.8%	-2%	-11%	16%	-26%	-34%	-24%