Branch on a Page
V0.1 Operational Excellence

POST OFFICE

Various reports are already available to support branch visits however, these are either complex or in separate formats/locations or unreliable

- Branch Insight Tool (BIT) is most commonly used, however this has now become too large and unreliable with updates

- Area Managers have to spend time preparing for visits by creating their own reports and/or printing

- Can not be accessed via mobile or tablet (for 'bring your own device' users)
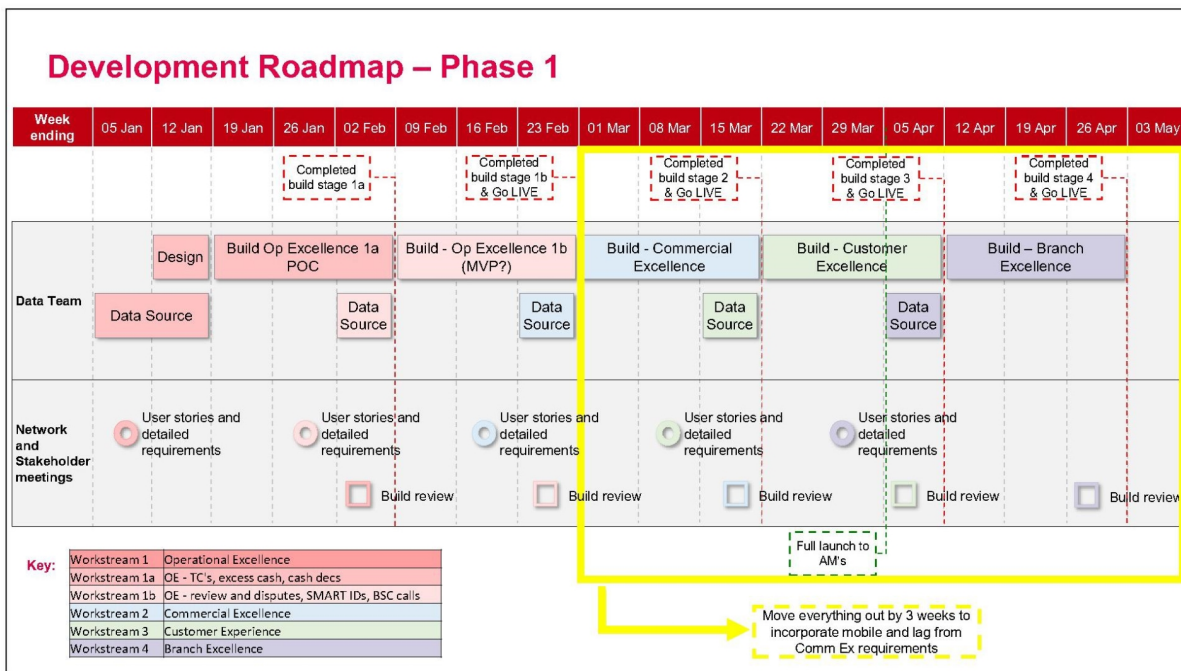
Purpose of Branch on a Page

- Provide a 360 view of a branch to support visits in a simple, user-friendly format

- Save time in preparation of visits – providing a consistent approach across the entire field team

- Mobile-friendly, reducing the need to print information prior to branch visits

- Postmaster/branch team friendly – enabling users to use the application side-by-side on visits, regardless of branch type

Development Roadmap – Phase 1

Week ending	05 Jan	12 Jan	19 Jan	26 Jan	02 Feb	09 Feb	16 Feb	23 Feb	01 Mar	08 Mar	15 Mar	22 Mar	29 Mar	05 Apr	12 Apr	19 Apr	26 Apr	03 May

Completed build stage 1a

Completed build stage 1b & Go LIVE

Completed build stage 2 & Go LIVE

Completed build stage 3 & Go LIVE

Completed build stage 4 & Go LIVE

Data Team

Design

Build Op Excellence 1a POC

Build - Op Excellence 1b (MVP?)

Build - Commercial Excellence

Build - Customer Excellence

Build – Branch Excellence

Data Source

Data Source

Data Source

Data Source

Data Source

Network and Stakeholder meetings

User stories and detailed requirements

User stories and detailed requirements

User stories and detailed requirements

User stories and detailed requirements

User stories and detailed requirements

Build review

Build review

Build review

Build review

Build review

Full launch to AM's

Move everything out by 3 weeks to incorporate mobile and lag from Comm Ex requirements

| Key:		
Workstream 1	Operational Excellence	
Workstream 1a	OE - TC's, excess cash, cash decs	
Workstream 1b	OE - review and disputes, SMART IDs, BSC calls	
Workstream 2	Commercial Excellence	
Workstream 3	Customer Experience	
Workstream 4	Branch Excellence	

V0.1 – Operational Excellence ready for pilot launch

- Phase 1 focuses on Operational Excellence KPIs
  - Transaction Corrections
  - Discrepancies
  - Cash Declarations
  - Excess Cash (awaiting data pipeline)

- Active Smart IDs and BSC calls information has been included due to readiness of data

- Data verification testing completed

- Measures aligned to Ops Incentive methodology
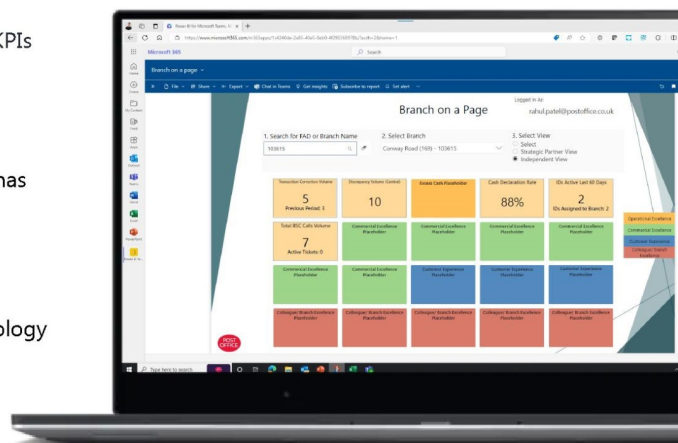
Available now for Regional Managers on both Desktop and Mobile
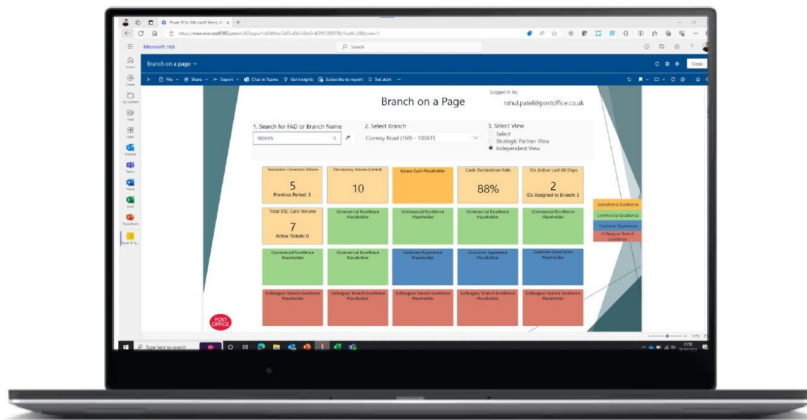
Next Steps

- **Soft launch for April** for Operational Excellence visits
  (instructions for Area Managers to follow next week)

- **Build Commercial Excellence** with aim to launch in launch in May

- **Visit log refresh** – move to one form and report within Branch on a Page

- Work with Strategic Partner team and DMB on ensuring appropriate
  views are in place ahead of launching with their field team