

Training Deployment Model

September 2023

Version 1.2



Contents

1. Overview and document purpose	1
1.1 Document overview	1
1.2 Version control.....	2
2. Executive summary	3
2.1 Context and background.....	3
3. Scope of conversion training for the Retail Transformation Programme.....	4
3.1 Key audiences in and out of scope	4
3.2 What is out of scope for this deployment approach?	6
4. Training deployment aims	7
5. Training approach	7
5.1 Levels of training	8
5.2 Training delivery pathways	10
5.3 Modality of training delivery.....	11
6. Training deployment logistics.....	14
7. Outliers	17
7.1 Remote Islands.....	18
7.2 PO Branches with no connectivity.....	19
7.3 Visiting branches with no connectivity	20
7.4 British Forces Post Offices (BFPO)	20
8. Operating model, roles, and responsibilities	21
8.1 Operating model for deployment.....	21
8.2 Proposed operating model for training.....	22
8.3 Key roles and responsibilities.....	22
9. Training Deployment Evaluation	24
9.1 Quality Assurance	24
9.2 Success Metrics	25
10. Appendix	26
10.1 Programme dependencies and outstanding decisions	27
10.2 Abbreviations	28
10.3 Supporting references.....	29
10.4 Next steps	30

1. Overview and document purpose

1.1 Document overview

The purpose of this document is to outline the training deployment approach, delivery methods, delivery channels and ongoing support as part of the New Branch IT (NBIT) transformation programme. The scope of this document will focus on the deployment of NBIT conversion training only.

The design, development, and piloting of the NBIT conversion training materials sits within the wider scope of the Strategic Platform Modernisation (SPM) training design team and is documented separately. Any roles that require full NBIT/new starter onboarding training, will remain under the scope of the Post Office Retail and Head Office Business as Usual (BAU) training teams, and therefore will not be covered within this document.

The purpose of this document is to:

- Outline how training will be deployed as part of the Retail Transformation Programme (RTP)* across the in-scope user groups (i.e., people working in Post Office branches, Postmasters, and counter staff). A detailed view of in scope audiences is provided on page 5.
- Set out the training deployment approach and training interventions that are being developed.
- Outline the logistics of deploying each type of training intervention.
- Provide clarity on the approach for outlier branches e.g., remote islands.
- Provide clarity on the scope of the training deployment activities and the roles and responsibilities of the various stakeholders.

NB. *This document is not aimed to be a detailed training curriculum or plan.*

1.2 Version control

Workstream	File name	Date of issue	Versions: Draft/Final	Reviewed by	Signed off by
Training	1 st Draft Training deployment model v1.0	15/09/2023	Draft (1.0)	- Tracy Marshall - Ranjeet Jouhal - Andy Kingham - Christo Caratossidis - Thomas Maddern	N/A
Training	Training deployment model v1.1	23/09/2023	Draft (v1.1)	- Christo Caratossidis - Thomas Maddern	
Training	Training deployment model v1.2	28/09/2023	Final (v1.2)	- Tracy Marshall - Christo Caratossidis - Thomas Maddern	

2. Executive summary

2.1 Context and background

The Post Office network plays an important role in local communities across the UK, providing products and services on which customers, including small businesses, rely. The key role the business plays in Britain's high streets has further increased with the demise of many banks. It is the biggest retail network in the UK and is vital to the UK's infrastructure for postal, financial and government services.

Post Office Limited (POL) has embarked on a programme of transformation to address historical failings in their core branch computer system, Horizon, and replace it with NBIT. Horizon is used for transactions between POL and its Postmaster branch network, and is owned, maintained, and managed by Fujitsu Services Limited. In the years following its roll-out, Postmasters claimed that there were problems with Horizon, which led to prosecutions and convictions of Postmasters for offences such as theft and false accounting. In December 2019, POL settled with a group of claimants who established legal action against the Post Office in response to their convictions. Following this settlement, the High Court ruled in the claimants' favour. In February 2020, a Public Inquiry was announced into the matter, with terms of reference and the appointment of a chair being announced in September 2020.

The vision of RTP** is to successfully lead colleagues and the retail network through the biggest retail transformation programme in Post Office history. This will be achieved by the programme's mission to build a robust retail deployment and training capability, that seamlessly delivers and embeds NBIT into the retail network; ensuring everyone is heard, informed, valued and ready. A key element for ensuring that retail branch employees are confident using the new NBIT terminal, is to first ensure relevant POL employees and third-party training/support providers are adequately trained on NBIT. The RTP** training teams current scope covers NBIT branch conversion training only, i.e., assumes that the recipient already knows how to use Horizon. Therefore, any roles in POL that do not require Horizon to complete their roles are out of scope. Equipping Postmasters and POL colleagues with the knowledge, skills, and capabilities to perform their roles effectively with the new NBIT system will proactively de-risk the transformation and prevent a likely drop in productivity or quality when changes are implemented.



Some key points to note:

- The scope of this document is limited to the **deployment of training**, rather than the training content itself.
- The programme is **focused on conversion training**, i.e., assumes that the individual already understands the current Horizon system. However, there is significant change to **branch management processes** and **trading period (TP) balancing**, therefore a large part of the training delivery will focus on these two key areas.
- **Our approach will evolve** as we move through the programme. If requirements emerge after approval of this document, we will work with the programme and its stakeholders to address them.

3. Scope of conversion training for the Retail Transformation Programme

This section outlines the key audiences currently in scope for the deployment of NBIT conversion training. Audiences that require full NBIT/new starter onboarding training, are out of scope and will continue to be the responsibility of the BAU Retail and Head Office Training Teams.

3.1 Key audiences in and out of scope

Teams in scope

The scope of RTP* training deployment covers employees in retail branch facing roles. This will include people working in Post Offices, including Banking Hubs, Postmasters (including equivalents in Directly Managed Branches (DMBs) and Strategic Partnerships (SPs)) and counter staff. Additionally, some wider supporting teams such as the Branch Support Centre (BSC) and Retail Field Teams and Training Teams, are also included in scope for delivery.



Teams out of scope

Several Head Office Teams will also require a level of NBIT training as established within the Training Needs Analysis (TNA) conducted by the RTP* training team.¹ However, these currently sit outside the scope of the programme and therefore will be addressed by the Peoples L&D Team.

The TNA also identified that 3 Head Office teams will require additional training content, in addition to the conversion training content being provided by SPM. These teams are Branch Assurance, Network Monitoring and Support, and Network Support and Resolution. These additional requirements are outlined within the TNA summary pack and have been shared with the Peoples Learning & Development (L&D) Team.

Audiences in scope	Audiences out of scope
- Post Office Counter Teams – DMBs, SPs and Independents - Postmasters, Branch Managers (DMBs), Officers in Charge (SPs) - Post Office Field Teams for DMBs and Independents (Regional and Area Managers, Business Development Manager (BDMs)) - Strategic Partnerships Post Office Field Teams - Post Office Training Team – DMBs and Independents - External Training Provider/ Third party support roles (To be onboarded) - Branch Support Centre (BSC)	- Post Office employees that currently do not use Horizon to complete their roles - POL Head Office Teams that do access Horizon to complete their job role - New Postmasters that take over a branch with NBIT post its deployment - New employees joining POL that will need to work with NBIT - Relief Postmaster businesses

¹ See 'TNA ppt – 'TNA Part 1 v1.0' and 'TNA excel – 'TNA Excel Part 1 v1.0' for a detailed overview of the TNA conducted (document linked on page 29)



3.2 What is out of scope for this deployment approach?

Item <u>out</u> of scope	Why this is out of scope
Design and build of training	The training materials are being designed and built by the SPM training design team. RTP* training team is only responsible for the deployment of these materials.
LMS implementation and configuration	SPM training team are building and implementing the Learning Management System (LMS).
Management of courses on LMS	SPM training design team will own the initial uploading of courses on to the LMS and remain in support for up to the first 6 months of deployment., to amend courses where required based on critical or substantive feedback. The RTP* training team will then be handed over the responsibility of deploying this content.
Onboarding training/New Postmaster training	These activities are owned by the BAU Retail Training Team. <i>Example BAU activities:</i> • NBIT Training build for new Postmasters • NBIT Training delivery to new Postmasters • BAU Training for POL employees- will sit with Learning & Development Manager in the Peoples L&D team
POL Head Office Teams	There are teams within Post Office Head Office who require an in-depth knowledge of the NBIT system to perform their role, including Training Teams, and teams that investigate discrepancies or high losses. These teams (except Training Teams) are not in the scope for RTP** deployment. NB. RTP* have flagged via the programme, that these teams should be included in the scope for RTP* deployment. This is yet to be agreed. The Learning & Development Manager for POL employees will take responsibility for the delivery of training to the specialist POL Head Office (HO) Teams.

4. Training deployment aims

The overall aim for training deployment is to ensure that POL Retail, Business Service Centre (BSC) and third-party training/support providers, are upskilled, confident and competent to go-live with NBIT deployment. This will support the programme mission to build a robust retail deployment and training capability, that seamlessly delivers and embeds NBIT into the retail network; ensuring everyone is heard, informed, valued and ready.

Training deployment objectives:

- Ensure all users are confident and competent to use NBIT to fulfil their role requirements on day one of go live, by ensuring they are adequately trained.
- Ensure that the training experience provided is relevant, accessible, and positive for all included within its scope.
- Ensure that training is pitched at the appropriate level, tailoring learning for different audience groups based on their user needs and familiarity required of the system.
- Ensure the appropriate support and feedback mechanisms are in place during training and post go-live, providing audiences with the opportunity to raise any concerns or additional support requirements they have throughout their training journey.

5. Training approach

This section outlines the way in which training will be deployed across our in-scope audience groups. When designing this approach, the Horizon Issues Judgements (HIJs), Common Issues Judgements (CIJs), Project Implementation Review (PIR) and additional comments made about training during phases 2 and 3 of the Inquiry were reviewed and taken into consideration, ensuring that the proposed approach and recommendations will seek to address issues that arose in the past.²

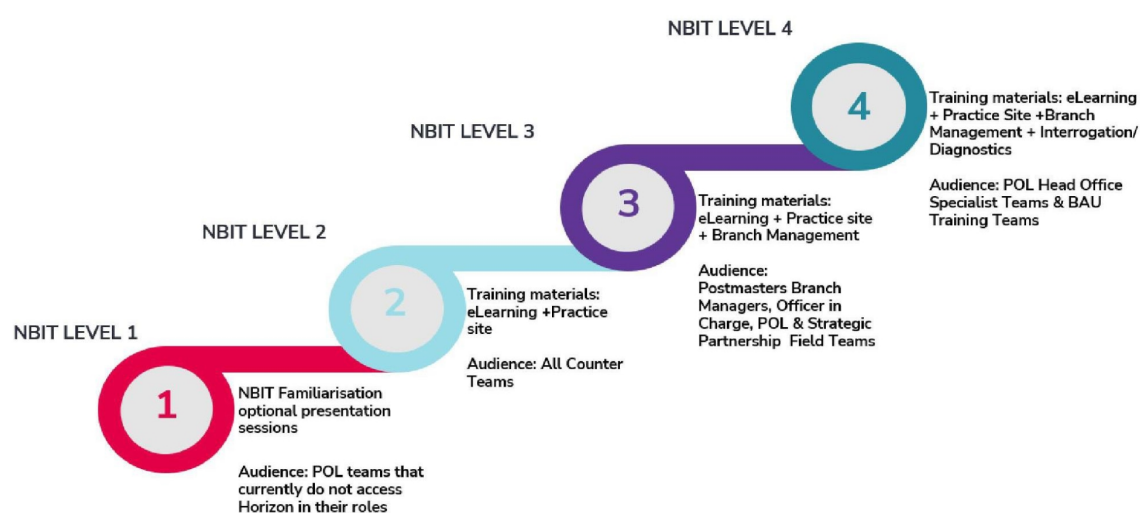
² See 'RTP* Training Impact Plan v1.0' for more information on HIJs, CIJs and PIR related to training (document linked on page 29)

5.1 Levels of training

Audiences identified during in the TNA activity have been split into categories based on the level of expertise and familiarity that they require in NBIT.

After reviewing these findings, we identified that four levels of training would be required across the business, these are outlined in the table below.

Diagram of the 4 levels of NBIT training



Based on audience groupings, levels 1-4 have been further broken down into 5 individual training pathways. These are reflective of audience's role, skill set and knowledge needs, taking in to account that a one size fits all approach to training was not suitable and that tailored pathways would be required for core audiences such as Trainers, Counter staff, Postmasters, and SPs (see section 5.2).

Table of key details for the 4 levels of NBIT training

Level	Description/training modality	Roles in this level	In scope for RTP**?
NBIT Level 1	- For users that do not currently use Horizon to complete their roles but need awareness of the new system. - This will be delivered through comms awareness campaigns.	All POL teams that currently do not access Horizon to complete their roles	No – comms activity
NBIT Level 2	- For users that currently use Horizon to serve customers in Post Office Counters. This level does not include back-office processes (e.g., TP balance and cash count). - This will be delivered through the eLearning and practice site.	- Branch Postmaster - Relevant branch employees - Branch counter team	Yes
NBIT Level 3	- Level 2 training + back-office processes (e.g., training period balance and cash count). - This will be delivered through eLearning, practice site, branch management classroom sessions (either virtual or on-site), and Trade Period (TP) Balancing webinars.	- Branch Managers - Officer in charge from the branch - Field Teams (POL & SPs) - POL HO specialist teams - Training partner - Deployment partner	Yes – with exception of Specialist Investigation Teams which will be the responsibility of the Peoples L&D team
NBIT Level 4	- Levels 1-3 + specialist investigations training (e.g., interrogation / diagnostics). - This will be delivered through eLearning, practice site and classroom sessions (either virtual or on-site).	- On-site trainers - On-site trainer team leaders - Quality Assurance Training Lead's (QATL's) - classroom trainers - Regional training leads x2 (North & South) - Head office specialist teams	Yes – with exception of Specialist Investigation Teams which will be the responsibility of the Peoples L&D team



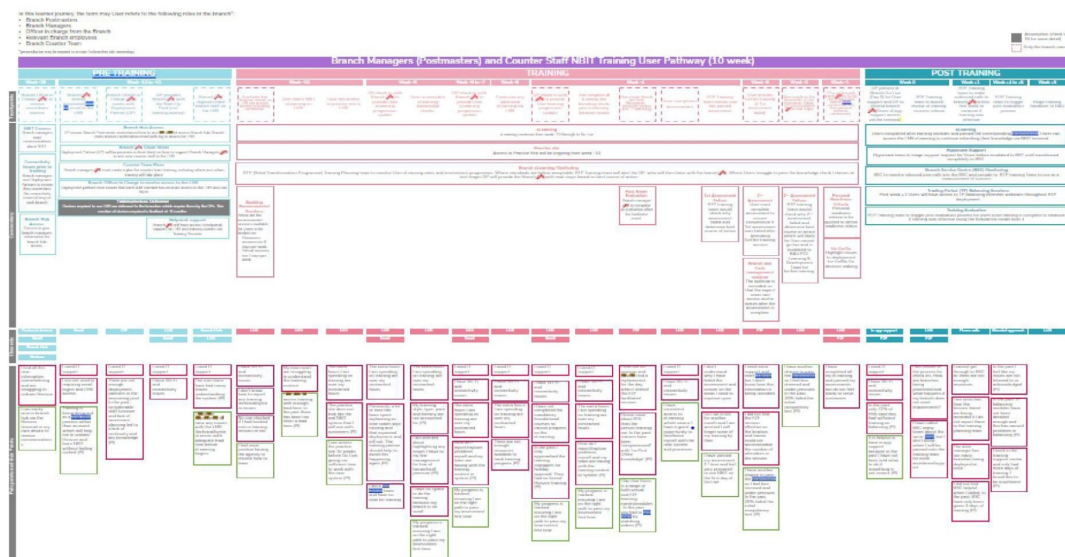
5.2 Training delivery pathways

Five training pathways have been designed to date, each providing an overview of the specific, individual training 'touchpoints' for each core audience, based on their role and level of training need. Each pathway maps out the baseline NBIT conversion training approach and requirements for its intended audience.

The 5 pathways created are outlined below³:

1. Head Office Roles
2. External Training Partner
3. Deployment Partner Role in Full-Counter Roll-out Pathway
4. Branch Managers (Postmasters) and Counter Staff NBIT Training User Pathway (see example below)
5. Strategic Partnership for Branch Postmaster, Branch Officer in Charge, and Branch Counter team

Branch Managers (Postmasters) and Counter Staff NBIT Conversion Training user Pathway 10 weeks



³ See 'POL NBIT Conversion Training Pathways v1.0' pack for all 5 training pathways (document linked on page 29)

NB: These pathways have now been signed off in principle based on the current programme understanding and will continue to evolve through the next phase of design. So far, they have been used to help test the proposed approach with several key programme stakeholders, with the aim of gathering feedback on any friction points, key dependencies, and opportunities to further improve the audience journey.

Once an agreed SPM plan for the overall NBIT deployment is defined and agreed. Each pathway will need to be revisited and additional discussions and inputs from key stakeholders across the wider SPM programme, and impacted POL teams, will be required to finalise each journey and obtain full sign off from the business.

5.3 Modality of training delivery

A blended approach to learning

As outlined in the levels of training above, each of the 4 NBIT levels will receive a more tailored combination of training dependant on their needs and the training pathway they have been assigned.

Training will follow a blended approach, using a mixture of both online (self-serve) and facilitated (formal classroom) learning experiences, via a mixture of platforms. The diagram below provides a summary of the delivery methods that will be used, and highlights what each of the 4 NBIT levels will receive.



eLearning

Audiences aligned to Level 2 and above will all be required to complete the eLearning training via the LMS, to help convert from their current knowledge of Horizon to the new baseline knowledge required of the NBIT system. It is currently estimated that these modules will take between 5 to 6 hours to complete over a set period.

eLearning content will be created in 'bite-size' modules to reduce time impact on branches and enable learning to happen during the contractual working hours of counter teams.

NB. It is critical learning is offered in small chunks over an extended period, as many counter staff work short hour contracts and earn minimum wage, or close to. Therefore, there is a need to ensure they can access and complete learning during their contractual hours to avoid contravening any working time regulations. This could expose the Post Office to negative media attention if not adhered to.

Practice Site

SPM have requested the build of an online Practice Site to support learning. The Practice Site will provide a safe environment for learners to test their knowledge of how to use NBIT, following on from the eLearning content. Learners will use the site to practice key common scenarios and build their familiarity with the system, ahead of their new terminals being installed. There is plan for this site to remain accessible after learning is completed.

NB: Currently the practice site will be the only way branches can practice using NBIT before terminals are installed in their branches. Several risks have been raised around this already as this is a critical requirement for training, especially when it comes to enabling branches to practice their back-office balancing activities. If this solution is found to be not viable, an alternative solution must be found to allow audiences to safely practice using NBIT prior to go live.

Classroom Learning (virtual or on-site)

Most transactions within NBIT do not change significantly from the current process within Horizon, however, Branch Management and TP Balancing do alter considerably. To address this, we plan to run more focused, facilitated training to support Postmasters specifically with these processes. We refer to this as Level 3. This will provide them with the opportunity to solidify what they have learnt from the eLearning and speak through these changes with someone in detail.



Audiences will be offered the option of attending either virtual or on-site classrooms (see diagram for key details). Sessions will be open to anybody that leads a Post Office branch or has a responsibility for completing branch management/TP balancing activities (e.g., where a Postmaster has multiple branches, they should attend in addition to a minimum of one nominated person from each of their units).

NB. We have listened to the feedback from the Postmasters Working Groups and the NFSP, and therefore will plan to run virtual classroom sessions 7 days per week, covering a range of mornings, afternoons, and evenings; on-site classes will run Sunday to Friday giving Postmasters the choice of which they prefer to attend. We have avoided times/days when Postmasters told us are their busiest. Additionally, Postmasters requested a maximum of eight learners per session, on-site or virtual and that virtual sessions will for a maximum of two hours.

Diagram of key information for on-site and virtual training sessions

	On-site	Virtual
 Length	Circa half a day	Maximum of 2 hours
 Days	Sunday-Friday	Sunday-Saturday
 Logistics	Maximum travel of 50 miles to attend training	Leveraging same materials as on-site sessions
 Capacity	8 people	8 people

Post deployment Webinars – Trading Period (TP) Balancing

Support for branches on balancing during the rollout of Horizon has been heavily criticised at the Inquiry, with the balancing training and trading statement for the Horizon system being called out as very poor compared to other training modules.

As this is an area of significant change in the move to NBIT, we will aim to address this by offering a regular programme of daily (Monday-Friday) Webinars for branches to dial into when they are ready to complete their first TP balancing activities via NBIT.

We will offer the choice of three Webinars per day. We will not expect places to be booked, we will not restrict numbers, nor will we restrict how often a branch can

Page | 13

*At the point this deliverable was written, the programme was named RTP which has since merged to become SPM.



access these webinars (we recognise that some branches may want to attend more than one session until they feel sufficiently confident in the process). SPM Training Design are producing the material for these sessions, there is also a plan to record a session and make this available to branches for them to online self-serve when needed.

Table of proposed schedule of webinar sessions

Post Deployment support with first TP Balance – **2hr Webinar session**

15 Sessions per week – no maximum capacity



	Mon	Tues	Wed	Thu	Fri
AM	10:00	10:00	10:00	10:00	10:00
PM	14:00	14:00	14:00	14:00	14:00
	17:00	17:00	17:00	17:00	17:00

6. Training deployment logistics

This section outlines the logistics behind deploying NBIT training to in-scope audiences outlined in section 3.

Whilst most audiences will follow these pathways and logistics, there are some groups who will not, and additional logistics will be required. For more information on these groups, please see the next section (Section 7: Outliers).

eLearning

- All counter staff, including Postmasters or equivalents, will access their eLearning via the LMS.
- A URL will be shared to access the LMS via comms on the lead up to training kick off for that branch.
- The LMS will be programmed with the Financial Accounts/Accounting Department (FAD) Code (unique identity code per Post Office branch, which identifies the type of Post Office branch i.e., Main or Local) so that only the appropriate training for the transactions offered within the branch are accessible; we will not train 'local' teams in content that is not relevant to their branch.

Page | 14

*At the point this deliverable was written, the programme was named RTP which has since merged to become SPM.



- Learners will be able to access modules as often as they like and will still be made available post deployment. The only ask is that completion of all modules is actioned within the allotted timeframe as part of the deployment readiness criteria.
- At the request of users, training is to be designed in 'bite-size' chunks to enable it to be more digestible and time effective.
- Postmasters (and equivalent) will be able to monitor eLearning completion of their teams. They will be required to verify their team have completed their learning ahead of Go Live.

Branches without a suitable device

- At the time of developing this document, no work has been done to establish how many branches do not have access to a device to access eLearning. SPM are currently exploring options to credit each branch with £200 to purchase, and retain, a device locally should it be required.

NB. A decision will need to be made by the SPM programme on the best way to address this issue, this approach will also need to be piloted ahead of full counter roll out.

Practice site

- It is anticipated that a separate online Practice Site will be built to support learning in the absence of branches being able to practice on physical terminals.
- Practice Site will be accessed via Branch Hub.
- This will be released to a branch at the same time as their eLearning and will remain accessible even after the deployment of NBIT.
- It is important to note that the practice site does not sit within NBIT and therefore, cannot contribute to physical transactions (unlike the Horizon practice tool).

Online webinars

- We plan to run 15 TP balancing sessions per week to support branches at the point of their first TP.
- These sessions will be hosted via the LMS.

NB. LMS functionality to support, host and schedule webinars will need to be confirmed, if not an alternative platform will need to be established.

Virtual classrooms for Postmasters

- At peak, we plan to offer up to 60 virtual sessions each week, across seven days.
- These will be offered, booked, and hosted via the LMS. There is a principle that these will not last longer than 2 hours.
- An administration team within Retail Operations Centre (ROC) will be responsible for inputting the virtual training sessions onto the LMS.
- Despite on-site classrooms being an option, there is a desire to encourage as many people as possible to choose virtual training. We anticipate a gradual decline in take-up for on-site classroom sessions as the programme progresses, and word gets out that virtual sessions are as effective as on-site training. There is a plan for the NBIT Comms Team to support training with this change in culture, by sharing positive stories from Postmasters to promote their experiences with the virtual training.

NB. LMS functionality to support, host and schedule Virtual Classrooms will need to be confirmed, if not an alternative platform will need to be established.

On-site classroom sessions for Postmasters

- Conversations in 2022 with Postmaster Working Groups and the National Federation of Sub-Postmasters (NFSP) demonstrated that culturally there is a preference for on-site training for many Postmasters; The Retail Engagement Director (Tracy Marshall) is keen for on-site classes to continue to be part of the NBIT offer, therefore we need to ensure this is an option for the Postmasters as an alternative to virtual.
- **The Post Office expects Postmasters to travel a maximum of 50 miles to attend training.** It's important to note that Postmasters incur all the costs associated with attending on-site training – backfill, travel, meal costs etc.
- Classroom sessions will be offered across the UK predominantly hosted at POL sites such as Counter Training Offices (CTO's) and DMBs utilising unused rooms located above the branch. This will need to be supplemented by a small number of external venues to ensure sufficient coverage of the country.
- Training classes offered in a CTO, will be in the site's meeting room and not in the BAU Training Room, with two exceptions, Plymouth, and Cambridge. These two venues are available Mondays & Fridays only. This has been agreed with the Head of Training Delivery, Postmaster Effectiveness (Ranjeet Jouhal).
- At peak we plan to offer 45 Classroom sessions each week, Sunday to Friday.
- These sessions will be offered and booked via the LMS.



- A training administration team will be responsible for scheduling the training sessions and assigning the venues. These will then need to be uploaded into the LMS for booking on a weekly rolling basis.
- External venues will need to be secured via the current POL venue provider Agiito.
<https://www.agiito.com/>

On-site classroom locations

To date, 26 potential on-site training classroom locations, ideally placed around the UK, have been identified and are listed below. These locations would enable 95% of all Post Office Branches to attend a classroom session within a 50-mile radius.

For the 5% of branches that sit outside of this offer (e.g., remote Isles) a separate approach will be offered. This is further covered in the following outlier's section of this document.

Directly Managed Branches (DMBs)	External Locations	Counter Training Offices (CTOs)
• Chesterfield • Hampstead • Kingsland • Grimsby • St Albans • Milton Keynes	• Llandudno North Wales SPA Hotel • Penrith North Lake District SPA Hotel • Inverness Marriott • Exeter Jurys Inn • Bury St Edmunds Best Western • Maesmawr Hotel Wales • Leeds Parks Plaza • Stevenage Holiday Inn • Maidstone Mercure	• Basingstoke • Belfast • Bridgend • Coleshill • Glasgow • Mutely • Cambridge • Perth • South shields • Stockport • Swindon

NB. Further modelling activity will need to be carried out to confirm and secure the required number of on-site training venues and their locations once a better understanding of the end-to-end SPM deployment plan is known.

7. Outliers

There are some Post Office branches that will not be able to fully follow the approach outlined above. These include Post Office branches on remote islands, British Forces Post Office (BFPO) branches, and branches with no/poor connectivity. This section outlines the logistical considerations required for these branches and the approach to deploying training to these groups.

NB. The information in this section contains our initial research and recommendations for these branches, this approach will need to be refined and agreed as we move through the programme.

7.1 Remote Islands

There are more than fifty remote islands in the UK that have at least one Post Office branch located on the island.⁴ In total, there are 127 branches that will need to be trained, situated on remote islands, these can be seen in the diagram below.

These locations are referred to as remote as access is only by sea, weather permitting, or in some cases by air.⁵

With a large volume of these remote branches located in the Scottish Isles, it is important to be aware of the **Scottish Government's strongly held view, that businesses in these remote islands receive the same experience and service as those on the mainland.**

We have agreed that a tailored deployment solution is required for these locations and that they should not be included in the automated plans with the rest of the UK.

Training will likely need to visit every remote branch that cannot access learning because of no/insufficient connectivity. Due to constraints of sea travel, it has been agreed to only deploy NBIT to these branches during summer months, when sea crossings are most likely to run regularly. Sea crossings are not always daily, and many islands do not offer overnight accommodation or allow vehicles, therefore a more detailed plan is required for these islands.

⁴ See 'Remote Islands' for a detailed overview of all Scottish Isles (document linked on page 29)

⁵ See 'Remote Isles Training Accessibility Survey (July 2023)' excel for the outcomes of this survey (document linked on page 29)

Diagram of remote island locations



7.2 PO Branches with no connectivity

Where a branch has no, or insufficient connectivity, training materials will be provided in 'hard copy.' If a branch is unable to access eLearning and the Postmaster is not able to join virtual sessions, we will send a Trainer to deliver training on-site. Once an NBIT terminal has been deployed, branches will be able to access their learning via the terminal.

Where there are branches on the mainland that do not have sufficient connectivity to access the LMS, we will respond in the same way, sending a hard copy training pack in advance, followed by a Trainer to deliver on-site NBIT training at the branch.

NB. This link shows the connectivity of each branch at the time of collating this report.⁶ It lists almost 100 that rely on satellite connectivity. Although many of these are branches in the Scottish Isles, there are branches across all regions of the UK with only satellite connection. The work was compiled for us by Senior Service IT Manager, Network & Connectivity, (Ashley Humphries). Approximately 300 branches have an 8meg download speed, most branches have a 24meg broadband speed. Obtaining up to date information on branch connectivity will be vital in determining numbers of on-site trainers required.

⁶ See 'Scottish Isles No Connectivity V1' for an overview of branch locations with no connectivity and the nearest branches to these with mobile connectivity (document linked on page 29)

7.3 Visiting branches with no connectivity

It is not always easy to contact branches by telephone, and currently not all branches have an active email address. It is advisable to pass a copy of the planned training schedule to Grapevine (POL security team) so that if a Postmaster calls, they can confirm that it is a genuine visit.

7.4 British Forces Post Offices (BFPO)

BFPO provide a Postal and Courier Service to the UK armed forces worldwide. Their 19 Post Offices (with 21 counters in total) are based overseas at permanent and operational concentrations of British Service Personnel.

BFPO are responsible for their own:

- Policy, governance, and performance management
- London based courier and sorting offices
- Technical support
- Corporate services

Training BFPO in NBIT

Training Delivery to BFPO's will be their responsibility. We have agreed to train their small training team, who will then cascade onward to their 19 branches. The 'Train the Trainer' sessions will be at RAF Northolt, west London, where the leadership for BFPO is based. We will need to liaise carefully with them to ensure security clearance in advance. BFPO sit within POL's Strategic Partnership Team. At the time of compiling this pack a Strategic Partnership Account Manager (Billy Ware), has responsibility.

Because of the various time zones that BFPO branches operate in, SPM will need to ensure that videos giving guidance to TP Balancing are available to access whenever required.

7.5 Relief Postmaster Businesses

There are numerous Relief Postmaster businesses that can be drafted into a branch with little notice to lead the running of a Post Office on a temporary basis in order that the Government stipulation for national access to a branch is not compromised.

Page | 20

*At the point this deliverable was written, the programme was named RTP which has since merged to become SPM.



Many of these businesses are small, local family run businesses, but some are much larger. Many Relief Postmasters will find themselves managing a branch during the deployment to NBIT and will be upskilled as part of that branch, but those that are not yet assigned to a branch will require separate upskilling.

Further activity is required to establish the smaller businesses and agree an upskilling approach with them. Larger businesses do have their own training teams and have requested train the trainer sessions. The Head of Postmaster Onboarding, Jayne Pardoe, can help with a current view.

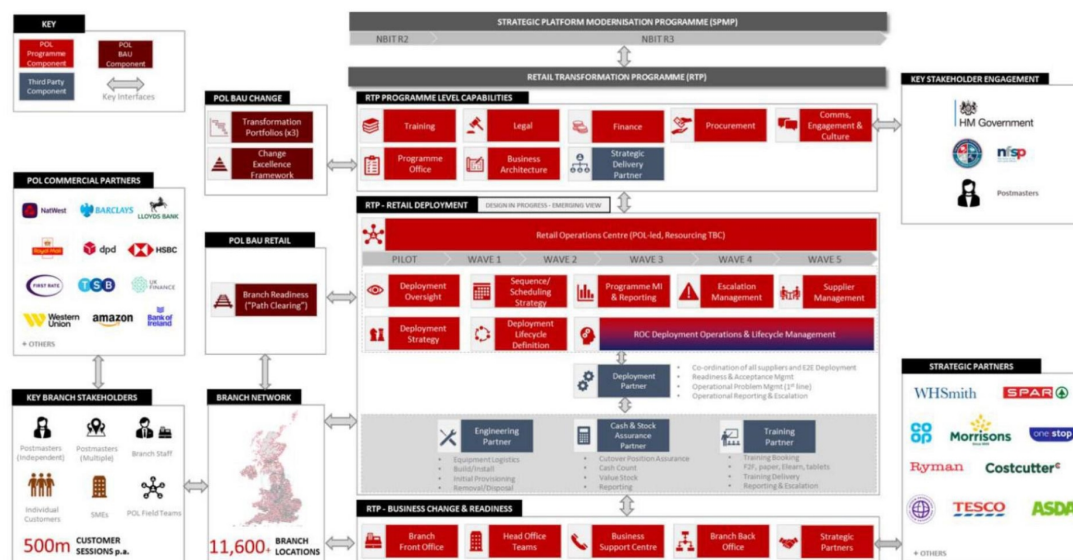
8. Operating model, roles, and responsibilities

This section outlines the training operating model for deployment, an overview of how the ROC brings together the different partners and the roles and responsibilities of the training resources required.

8.1 Operating model for deployment

The below diagram shows a high-level operating model view for NBIT deployment and how it interfaces with our partners and the wider business.

Deployment operating model



Page | 21

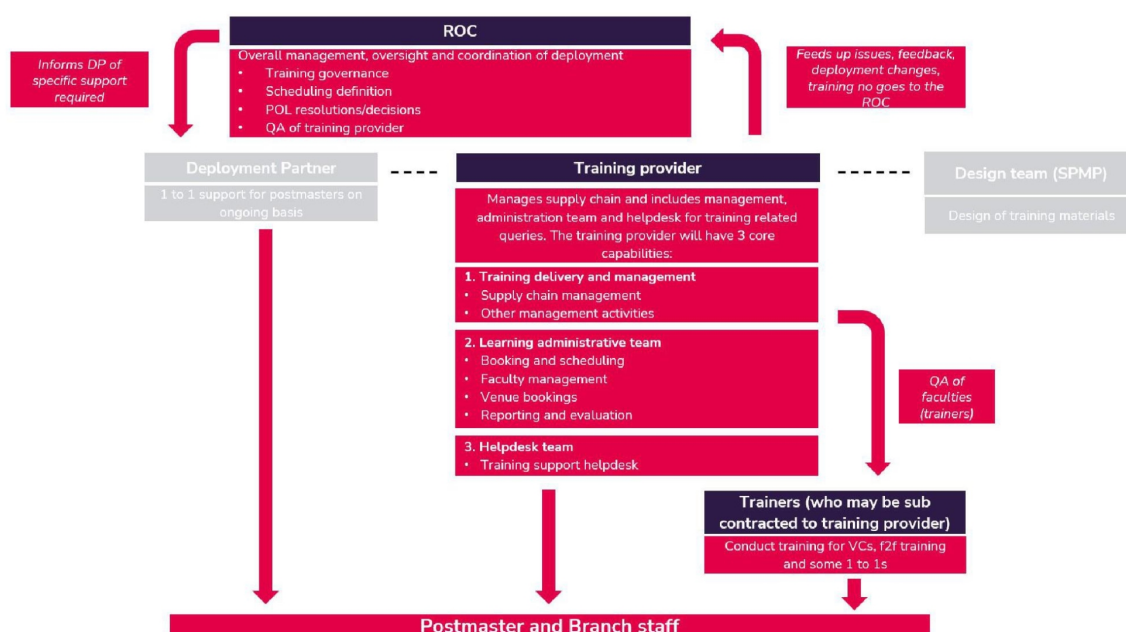
*At the point this deliverable was written, the programme was named RTP which has since merged to become SPM.



8.2 Proposed operating model for training

The next diagram shows a high-level operating model view for RTP* training. The Retail Operations Centre brings together POL and its partners to govern, monitor and de-risk the execution of deployment. Together, they implement and deliver the deployment lifecycle. Three core capabilities have been identified as the functional requirements for the Training Provider: training delivery and management team, learning administrative team and helpdesk team. Within these three core teams, there are several roles and responsibilities which are outlined in the section below.

Training operating model



8.3 Key roles and responsibilities

Deployment partner role

The Deployment Partner will be responsible for the removal of Horizon terminals and the installation of NBIT terminals, including all associated activity. This includes engineering teams and deployment management teams. They will also own the relationship with a Postmaster from week -12 through to week +2 and be the single point of contact within the programme for the Postmaster during the programme's lifecycle.

Key activities:

- POL branch visit to better understand ways of working
- Completes eLearning, trade immersion training and branch and cash management webinar
- Feedback to RTP* training team as part of training evaluation process
- Continued check-ins and contact with RTP* trainers support team

Training partner roles

Capability group	Role	Description
Training delivery management	Supply chain management	Responsibility for supplier sourcing and contracting, onboarding specialist suppliers as required, and provide quality assurance, regular vetting with evaluation and benchmarking.
	Other management activities	Other Managed Learning Service (MLS) activities such as delivery management, facilitator quality assurance, commercials, subcontracting, contract management, invoice management and service delivery management. Liaising with Deployment Lead to agree wording regarding NBIT Training in the Start-Up Packs.
Learning administration team	Booking and scheduling	Administrative support responsible for all back-office scheduling, bookings, cancellations, and rescheduling management of all face-to-face (classroom and on-site) and virtual training events throughout the duration of training deployment via LMS.
	Faculty management	Ability to subcontract qualified training providers that can deliver either face to face (classroom and on-site) or virtual classroom training across all regions of the UK to circa 22,000 people.
	Venue bookings	Administrators will support the scheduling and booking cancellations of venues, both POL and third-party owned venues.
	Reporting and evaluation	Provide effective data and reporting established against Key Performance Indicators (KPIs), Service

		Level Agreements (SLAs), and wider programme success metrics.
Helpdesk team	Training support help desk	Multi-channel help desk providing effective general query management underpinned by robust triaging query and escalation processes. Will act as key contact channel between branches and training deployment to ensure all branches are offered an excellent and fully supported training experience.
Trainers	NBIT Trainers	Capable of training delivery across three different methods: on-site classroom, virtual classroom/post deployment webinars and on-site branch delivery.

9. Training Deployment Evaluation

9.1 Quality Assurance

We will expect the Managed Service Training Provider, to establish a robust process of quality assurance (QA) to demonstrate to the programme that it regularly and actively measures the delivery of NBIT training in classroom, virtual and on-site sessions. SLAs and KPIs will need to be agreed as part of the Contractual Agreement.

RACI to demonstrate levels of ownership for QA

Topic	Responsible	Accountable	Consult	Inform
Training Design Content	SPM	Tracy Marshall, Retail Engagement Director	Tracy Marshall, Retail Engagement Director	Pete Marsh, Retail Operations Director
Faculty of Training Delivery	RTP*	Prime – Training Provider	Tracy Marshall, Retail Engagement Director	Pete Marsh, Retail Operations Director

The quality of training delivery of the Horizon system was heavily criticised by Postmasters at the Inquiry and POL will need to see that RTP* have checks and measures in place to effectively assure training of NBIT. There will need to be regular QA updates to POL throughout the duration of the roll-out.

Page | 24

*At the point this deliverable was written, the programme was named RTP which has since merged to become SPM.



9.2 Success Metrics

The training success metrics will assess how the Post Office Teams are engaging with the training content, where they may require additional support and whether the training has been effective. These metrics will be analysed across the deployment lifecycle and used to adjust the training as required.⁷ The CIJs, HIJs and PIR were reviewed and all training judgements and references relevant to training were highlighted. These judgements and references have been used, along with best practice, to determine what success metrics are required to ensure that individuals receive sufficient training.

The success metrics have been divided into 3 categories: progress metrics, effectiveness metrics and post-deployment metrics. There are several measures that will sit under each of these categories which are outlined in the table below.

Proposed training success metrics

Category	Metrics
Progress metrics Metrics that indicate how well users participated in the training provided, which reflect their initial reactions to the training	• Volume of branches trained by wave • eLearning module completion rate • Number of classroom sessions held • Attendance to classroom sessions
Effectiveness Metrics that will indicate how well the training supports learning and learning transfer.	• Final assessment scores • Average assessment pass rate • Time spent on modules • Time spent on practice site • Branch manager readiness survey • Feedback questionnaires • QA
Post-deployment metrics These metrics will help to gather direct feedback from users on their attitudes and behaviors on how useful they found the training and the new NBIT system.	• Deep dive evaluation • BSC calls • Revisiting eLearning • In App support • Feedback shared directly with Field Teams • TP balancing accuracy

⁷ See 'T2 Training Success Metrics_v1.0' for a detailed overview of Training Deployment Success Metrics (document linked on page 29)

Appendix



10.1 Programme dependencies and outstanding decisions

Issue	Impact	Decision required	Owner
Do we need to provide a suitable device to branches?	Counter staff & Postmasters need to access eLearning via a device	Procure & loan, or provide funding to purchase locally	SPM Programme Lead
Larger branches may need more than one device	Window for eLearning completion remains tight, if large team, one device will be insufficient	Survey branches to determine number of devices/funding required	SPM Programme Lead
Suitable Practice Site, incl branch management processes, requested by SPM but no indication of where it is in IT workplan	Will build confidence if accessible alongside eLearning. Highlighted during Inquiry	Develop Practice Site not in a live environment	SPM Programme Lead
Access to an NBIT terminal ahead of deployment	Will significantly increase confidence if teams can see terminal & peripherals before Go Live		SPM Programme Lead
An LMS is required to facilitate the delivery of NBIT Training	Current LMS does not have sufficient capability to schedule training events or host remote sessions. Also has limited number of licences	Procure a suitable LMS	Retail Engagement Director

NB. These dependencies feature in RTP*'s Risk Log in Service Now.

10.2 Abbreviations

Below is a table outlining the acronyms used in this training deployment model document.

Term	
BAU	Business as Usual
BDMs	Business Development Manager
BFPO	British Forces Post Office
BSC	Branch Support Centre
CIJ	Common Issues Judgement
CTO	Counter Training Office
DMB	Directly Managed Branch (sometimes called Crown Offices)
FAD code	Financial Accounts/Accounting Department
HIJ	Horizon Issues Judgement
HO	Head Office
KPIs	Key Performance Indicators
L&D	Learning & Development
LMS	Learning Management System
MLS	Managed Learning Service
NBIT	New Branch IT
NFSP	National Federation of Sub-Postmasters
PIR	Public Inquiry Recommendations
POL	Post Office Limited
QATL's	Quality Assurance Training Lead
ROC	Retail Operations Centre
RTP*	Retail Transformation Programme
SLAs	Service Level Agreements
SP	Strategic Partnerships
SPM	Strategic Platform Modernisation
TNA	Training Needs Analysis
TP	Trading Period

10.3 Supporting references

No	Document	Document link	Description
1	TNA – Part 1	TNA Part 1 v1.0.pdf TNA Excel Part 1 v1.0.xlsx	Overview of the TNA conducted identifying the specific training required for 115 Head Office teams in POL.
2	Impact Plan	RTP* Training Impact Plan v1.0.pdf	Summary of key themes identified from review of HIJs, CIJs and PIRs, and an outline of how the proposed approach and recommendations will seek to address issues that arose in the past.
3	Training pathways	POL NBIT Conversion Training Pathways v1.0.pdf	Overview of the specific, individual training “touchpoints” for each core audience, based on their role and level of training need. Each pathway maps out the baseline NBIT conversion training approach and requirements for its intended audience.
4, 5 & 6	Remote Isles Documents	Remote Islands v1.0.xlsx	Detailed list of all 127 remote isles branches.
		Remote Isles Training Accessibility Survey (July 2023).xlsx	Detailed list, outlining the accessibility requirements and constraints for each of the remote Isles branch locations.
		Scottish Isles No Connectivity Branches V1.xlsx	Overview of branch locations with no connectivity and the nearest branches to these with mobile connectivity.
7	Success metrics	T2 Training Success Metrics _v1.0.pdf	Outlines the training success metrics that will be used to assess how Post Office Teams are engaging with the NBIT training, where additional improvements can be made, and its overall effectiveness.

10.4 Next steps

This document was taken at a point in time during merger between RTP and SPM. Thus, this document will need to be revisited in the future and will continue to evolve through the next phase of design. Below are the high-level next steps from this deployment model.

1. Sharing and socialising the deployment model more widely across the SPM team
2. Close down programme dependencies and outstanding decisions (see section 10.1)
3. Develop detailed end-to-end deployment plan on how this approach will be deployed

