Branch Training and Support Programme

"As-Is" Experience for Branches

POST OFFICE®

1

Pre- appointment (process/PO contacts)

Applicant
Contacts points
- Website
- FCA
- Advert
- Existing links/Spmr
- Death in service or familiy transfer
- Business transfer agents

IRIS (online application)
Contact points
- NFSP
- HR
- Website
- AAPT
- FCA
- Multiples Rel. Manager
- ASM
- Business T/A
- Other POL people
- Finance – Business plan
- Accounts
- CRB disclosure interview
- Temp spmr advisor

Interview
Contact points
- Contracts Advisor
- ASM (if applicants)
- FCA (occasionally)

Decision
Contact points
PO to Applicant
- Contracts Advisor
- FCA (occasionally)
- Verbal conf.
- Written conf.
- Temp spmr advisor
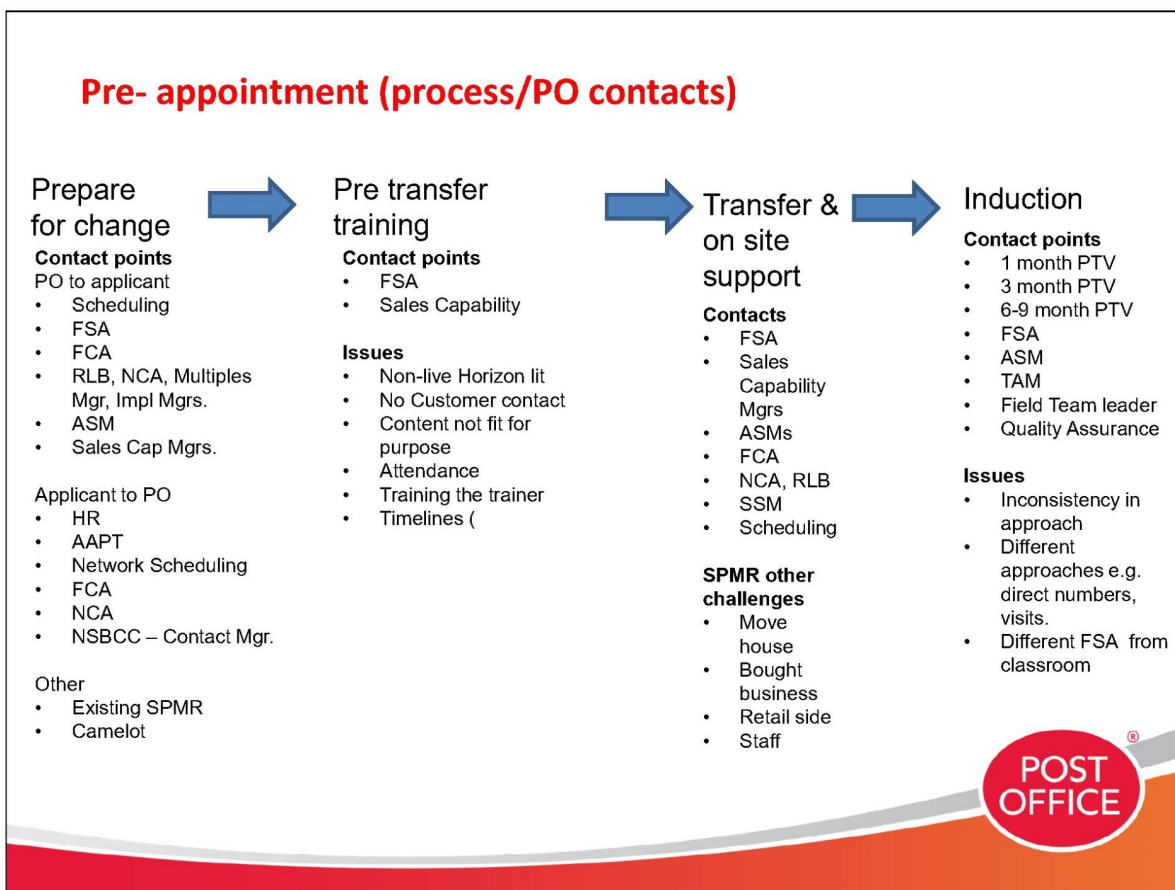
Applicant to PO
- Signed Contract

POST OFFICE ®

Temporary subpostmaster process is very stark compared to this. No assessment made on suitability of person to run the branch.

Experience very much varies on the type of branch you operate. If the branch is a new model, this is a combination of the touch points. If you are transferring on a standard SPSO contract because your branch type doesn't fit the model, and you are a non-ASM managed branch then the interaction is very limited.

NT and some of the objectives to hit the numbers appear to be driving the multitude of people contacting the branch in the objective to achieve and deliver the numbers. This objective is also driving some decisions to be made outside of policy.

At this stage of the process, we are still in what we need from the agent and aren't even considering what they need from the partnership/relationship going forward. It's all about what we want from them rather than what we can do for them.

Because of the subsequent relationship we then have with the subpostmaster in business as usual, we don't maximise the skill set of the people we have in the network and what expertise, learning they can bring to us.

Pre- appointment (process/PO contacts)

Prepare for change

Contact points
PO to applicant
- Scheduling
- FSA
- FCA
- RLB, NCA, Multiples Mgr, Impl Mgrs.
- ASM
- Sales Cap Mgrs.

Applicant to PO
- HR
- AAPT
- Network Scheduling
- FCA
- NCA
- NSBCC – Contact Mgr.

Other
- Existing SPMR
- Camelot

Pre transfer training

Contact points
- FSA
- Sales Capability

Issues
- Non-live Horizon lit
- No Customer contact
- Content not fit for purpose
- Attendance
- Training the trainer
- Timelines (

Transfer & on site support

Contacts
- FSA
- Sales Capability Mgrs
- ASMs
- FCA
- NCA, RLB
- SSM
- Scheduling

SPMR other challenges
- Move house
- Bought business
- Retail side
- Staff

Induction

Contact points
- 1 month PTV
- 3 month PTV
- 6-9 month PTV
- FSA
- ASM
- TAM
- Field Team leader
- Quality Assurance

Issues
- Inconsistency in approach
- Different approaches e.g. direct numbers, visits.
- Different FSA from classroom

POST OFFICE

Again, this experience is dependent on what type of branch you are. If you fit into the temporary subpostmaster

ALSO

COMPLEXITY ON THE NUMBER OF PEOPLE INVOLVED, LACK OF JOIN UP
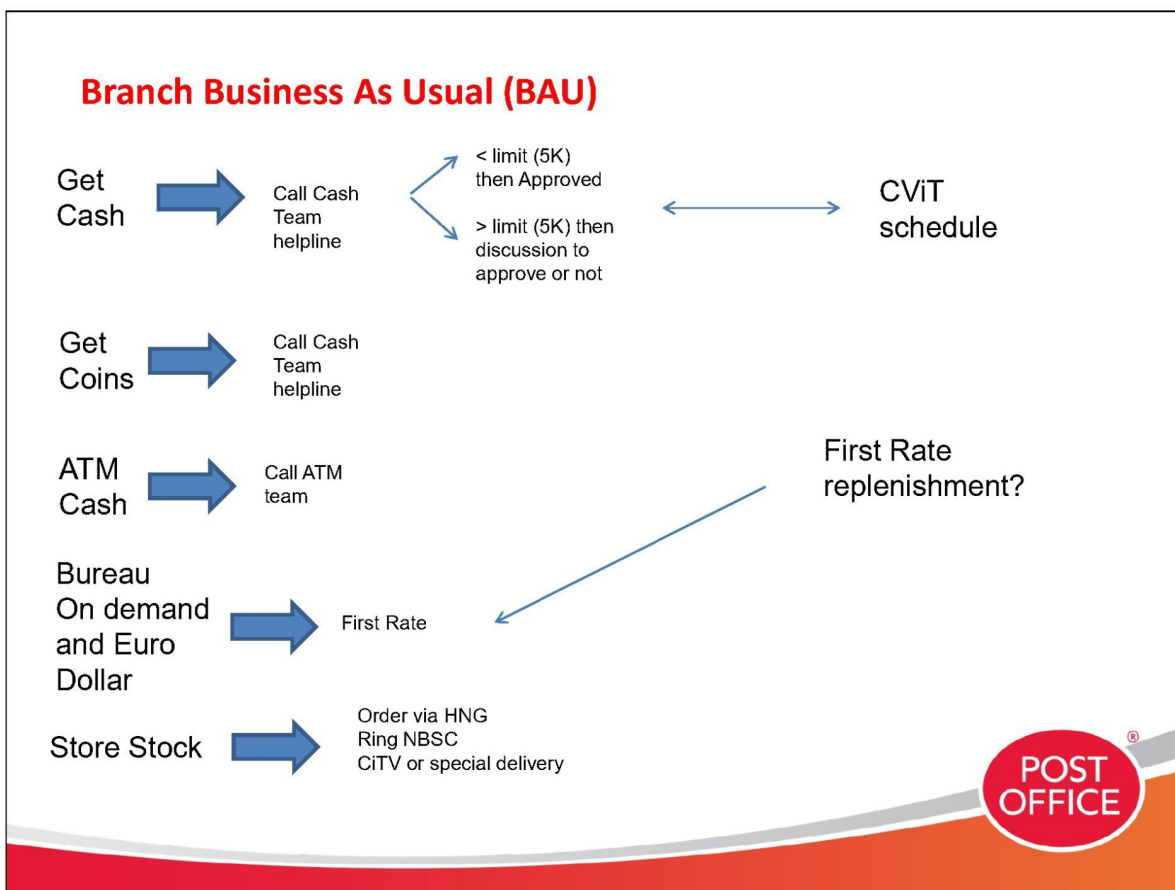CONSIDERATION OF LEARNING NEEDS
APPLYING REASONABLENESS TO INDIVIDUALS (IE. SOME TAKE LONGER, NOT ONE SIZE FITS ALL)
SPSO CONVERSION – PROBABLY COVERED IN YOUR BRANCH TYPES
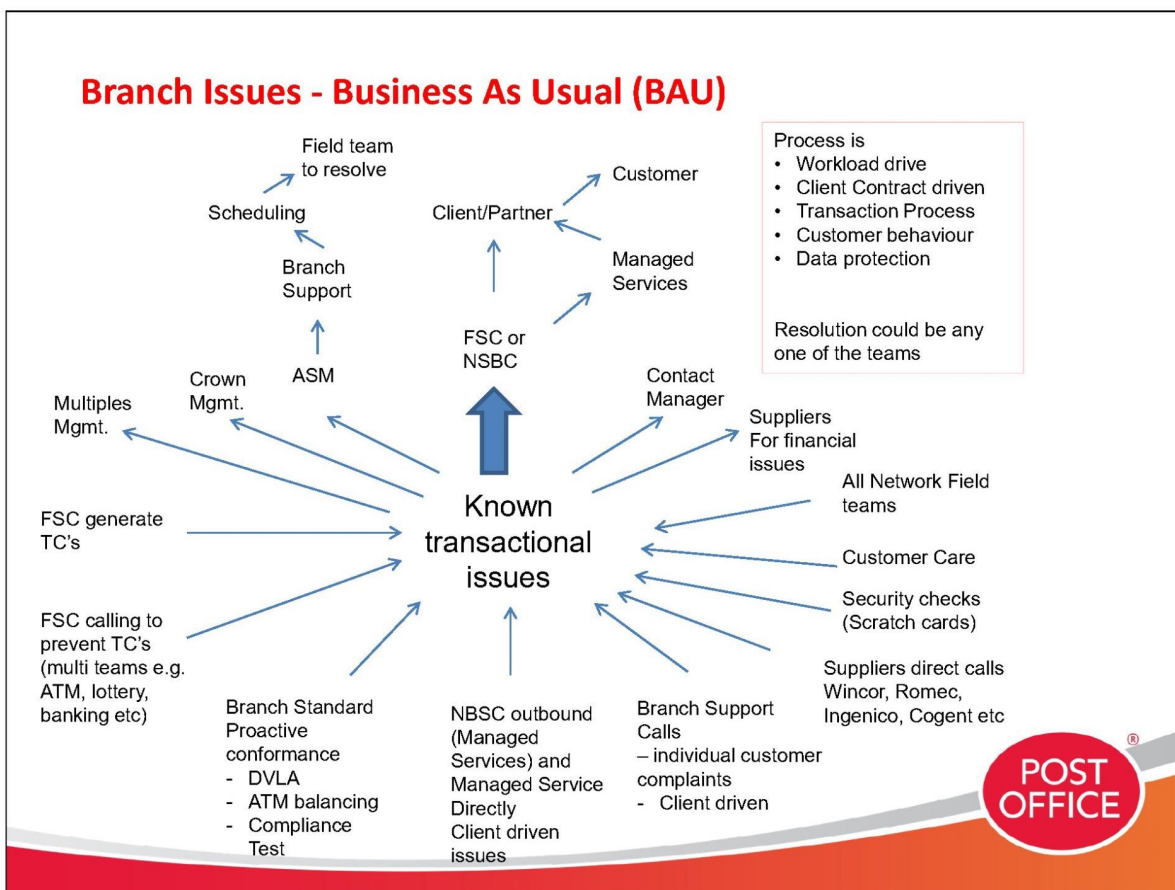WE DON'T TRAIN PEOPLE IN HOW TO RUN A BUSINESS OR OPERATE A SYSTEM UNDER BRANCH PRESURES
ASK FOR A BUSINESS PLAN BUT DON'T REALY USE OR BUILD ON THIS.
BETTER FLEXIBILITY ON APPROACH (IE. NOT ALL TRAINING AT ONCE)

Branch Business As Usual (BAU)

Get Cash → Call Cash Team helpline → < limit (5K) then Approved / > limit (5K) then discussion to approve or not ↔ CViT schedule

Get Coins → Call Cash Team helpline

ATM Cash → Call ATM team

Bureau On demand and Euro Dollar → First Rate

First Rate replenishment?

Store Stock → Order via HNG Ring NBSC CiTV or special delivery

POST OFFICE ®

ALSO

EXPERIENCE FROM TEAMS/INDIVIDUALS IS DIFFERENT

Branch Issues - Business As Usual (BAU)

Finance Service Centre would be multiple teams in this process

ALSO
GENERALL FOR ALL SLIDES – WHY DO WE MANAGE CROWN AND AGENCY SEPARATELY (BOTH MUST HAVE SIMILAR ISSUES, COULD WE BE LEARNING BETTER, MAKING IT LESS OF AN US AND THEM)
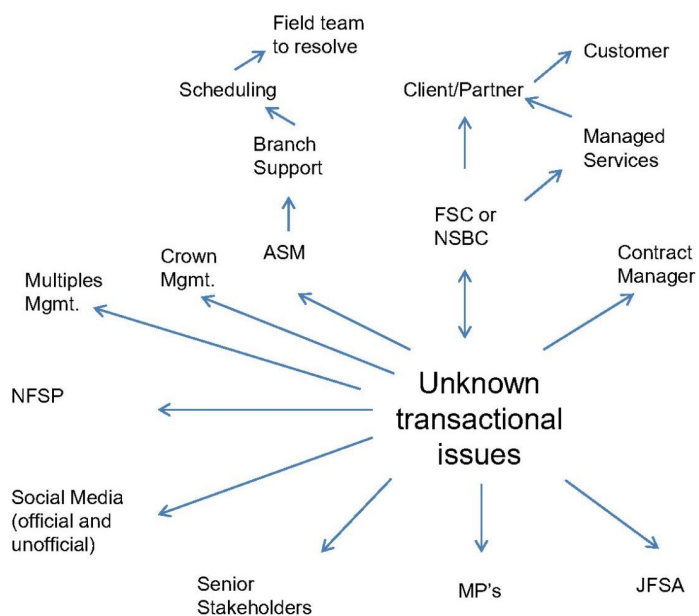SUPPORT FOR SPMRS – NEED TO FORMALISE THIS AND MANAGE BETTER
SUPPLIERS – EXAMPLES WHERE WE ARE NOT MANAGING HOW OUR SUPPLIERS MANAGE/WORK WITH SPMRS
NO MI ON HOW OFTEN OR HOW GOOD INTERACTIONS WITH BRANCHES ARE (AND WHETHER WE DEAL WITH THERE ISSUES)
ALSO NEED TO THINK ABOUT HOW WE CHANGE SPMR BEHAVIOUR (GET THEM COMFORTABLE USING THE PROCESSES)

Branch Issues - Business As Usual (BAU)

Field team
to resolve

Scheduling

Branch
Support

Crown
Mgmt.

ASM

Multiples
Mgmt.

NFSP

Social Media
(official and
unofficial)

Senior
Stakeholders

Customer

Client/Partner

Managed
Services

FSC or
NSBC

Contract
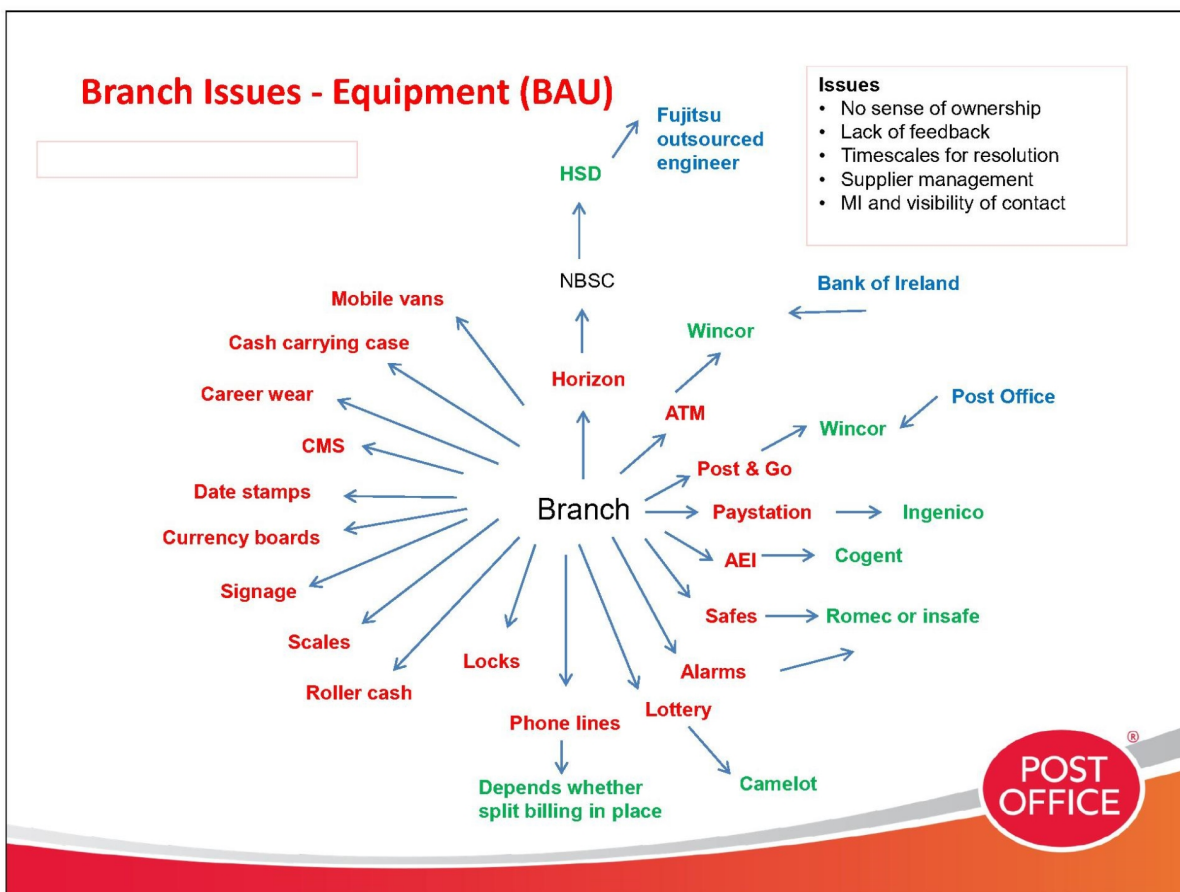Manager

Unknown
transactional
issues

MP's

JFSA

Process is
- Workload drive
- Client Contract driven
- Transaction Process
- Customer behaviour
- Data protection

Resolution could be any
one of the teams

POST OFFICE

Branch Issues - Equipment (BAU)

The branch is required to go to the supplier direct. No visibility is given to the types of branches who are experiencing equipment issues.

Escalation points will also be Area Sales Managers, Post Office personnel, Senior Stakeholders, NBSC, Crown Management and Paula etc. Once it gets escalated, the issue resolution usually ends up in Dave Hulbert's area.

Branches going through the Network Transformation Programme and Crown Transformation are project managed. The main people who get involved here are the FCA, the NCA and RLB. If there are multiple partner branches going through the process then there is also an implementation manager involved in the process.

Teams involved in branch training

Network Operations	Network Sales	Sales Capability	Network & Sales Perf. Manager	Financial Services	Crowns	Multiples	Clients
FSAs	ASMs	Regional Sales Managers	Sales Dev. Team	FSS	Branch Managers	Sales and Perf. managers	Parcelforce
FTLs		Regional Sales Capability Managers	Crown Sales Training Team	Mortgage Specialists	Assistant Managers	Retail relationship managers	FRES
(via Projects and Standards)		Sales Capability Managers	Mails Dev. Manager		HR	Partner relationship managers	Wincor
		TAM					Camelot

BAU operational training largely falls to FSAs, but NBSC, Branch Standards, FSC teams, Cash Management and Security depending on the gap identified

POST OFFICE

There is no clear owner for training. Everybody thinks they own various parts of training. Most are transactional based trainers and there isn't a large input from the type of skills that are being trained out.

Communication types and originators
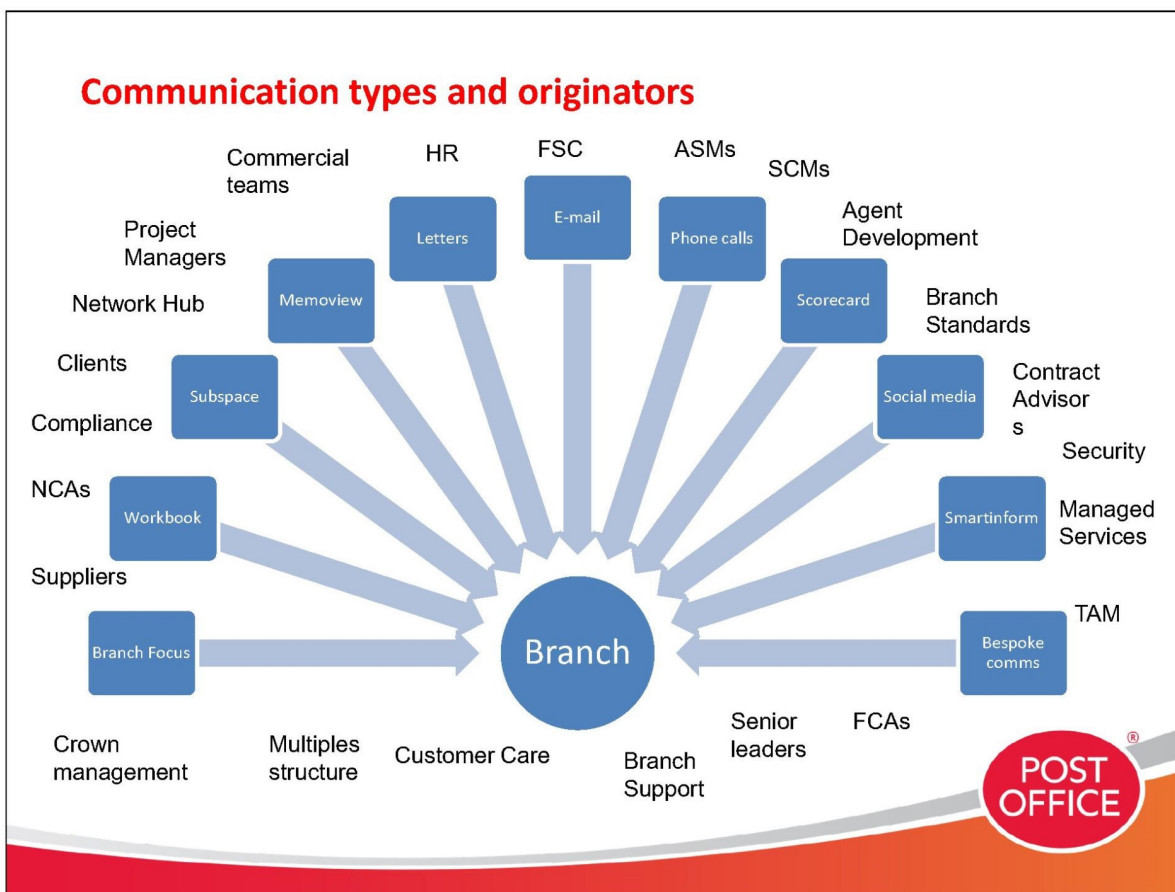
The way the business operates means that there are inconsistencies in the quality of the communication produced and everybody thinks they own branch communication. There is no visibility of who is saying what to branches.
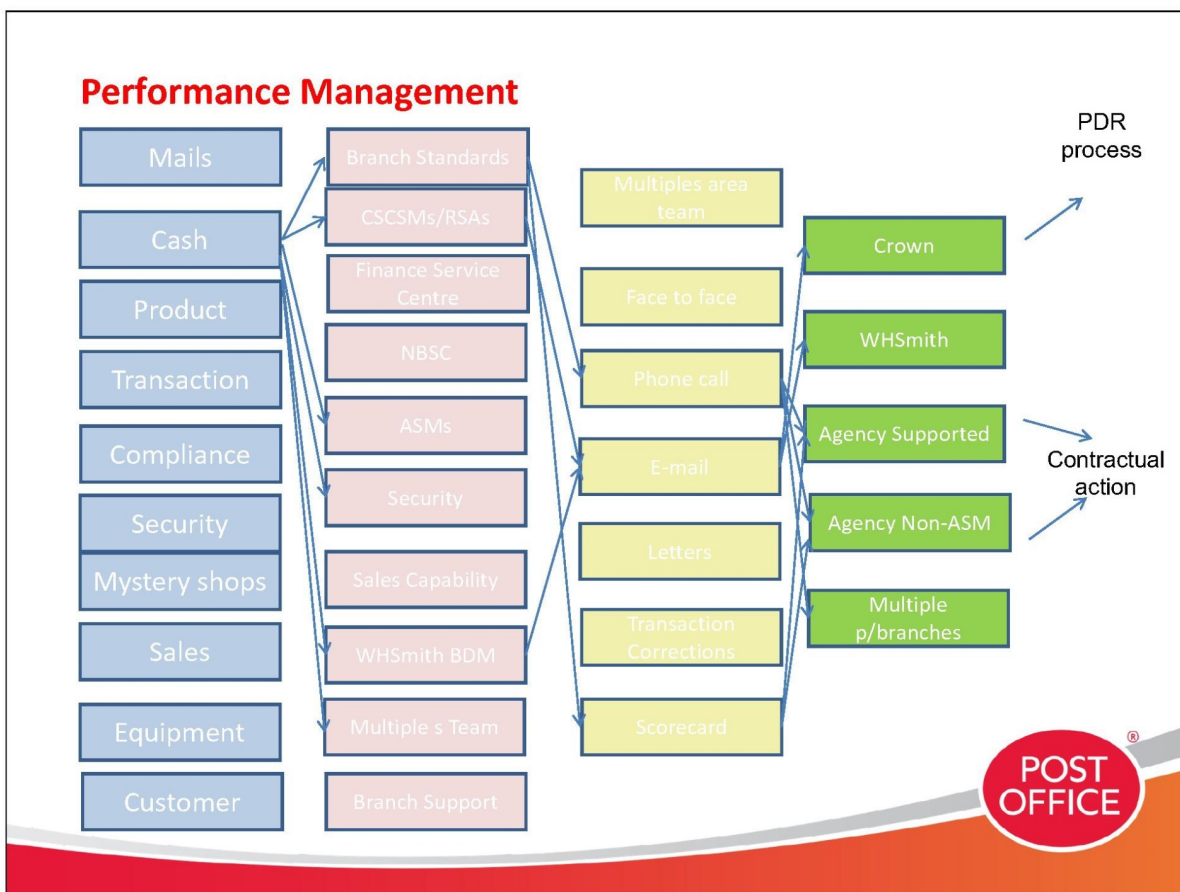
The slide just indicates the process for cash. This is high level but represents the complexity of the process, the number of people involved and the touchpoint with the branch.

The other point is also that the end result depends on the type of branch, and again, the consequences are inconsistent, depending on branch type.

There is no single view for the branch in terms of what they are being measured against and what the priorities are.

Exit process – No performance issues

Reason

- Resignation
- Death in Service
- NT Leaver

Appointment process

Contact points
- NFSP
- HR
- Website
- AAPT
- FCA
- Multiples Rel. Manager
- ASM
- Business T/A
- Other POL people
- Temp subpostmaster advisor

Audit and transfer

Contact points
- Contracts Advisor
- Network Scheduling
- FSA
- Temp subpostmaster advisor
- ASM

Late Account

Contact points
Former Agent Debt team
Contract Manager

POST OFFICE ®

Exit process – No performance issues

Reason

- Resignation
- Death in Service
- NT Leaver

Appointment process

Contact points
- NFSP
- HR
- Website
- AAPT
- FCA
- Multiples Rel. Manager
- ASM
- Business T/A
- Other POL people
- Temp subpostmaster advisor

Audit and transfer

Contact points
- Contracts Advisor
- Network Scheduling
- FSA
- Temp subpostmaster advisor
- ASM

Late Account

Contact points
Former Agent Debt team
Contract Manager

POST OFFICE

Exit process – Performance issues

Issue identified → **Audit** → **Investigation** → **Decision/Outcome**

Issue identified
- Contractual breach
- Legal issue
- Audit risk model
- Business concerns
- Random audit

Contact points
- Contract Advisor
- Branch Standards
- Security
- Branch Support
- ASM
- FSC
- Retail cash

Audit
- Suspension decision with Contract Advisor and member of Senior Lead Team
- Temp spmr advisor involved where suspension is carried out
- Security notified and make a decision whether to investigate
- Decision may not be to suspend but bring in spmr for interview

Investigation

Issues
- Contracts Advisor and Security running investigation in parallel
- Lack of investigation before suspension – suspension is trigger rather than result
- Inconsistent treatment of agent
- Further financial hardship to agent
- Inconsistent info share with agent
- Lack of quality measure for casework handling
- Lack of MI to identify cause of loss

Decision/Outcome

Scenarios
- Resignation to avoid termination
- Summary termination
- 3 months notice

And/or prosecution

Appeals allowed for summary termination, leading to:

- Up-held leading to application process starts
- Overturned and reinstated
- 3 months notice given either with or without charge changed

POST OFFICE ®

Glossary of terms

FSA	Field Support Advisor
CA	Contracts Advisor
RBL	(Contractor managing NT changes)
NCA	Network Change Advisor
ASM	Area Sales Manager
SSM	Stakeholder Support Manager
SCM	Sales Capability Manager
FCA	Field Change Advisor
HR	Human Resources
AAPT	Agent Application and Appointment Team
PTV	Post Transfer Visit
TAM	Telephone Account Managers

POST OFFICE®