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Review of Post Office Ltd New Entrant Training Pilot December 2011

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Executive Summary
Introduction & Background

In April 2011, the new entrant training offer for both classroom and on-site, was revised along with the Post Transfer Contact process, and deployed in pilot for the remainder of Q1 & 2, with an intention to review in Q3.

Delivering the review

The following stages were planned to deliver the pilot review in Quarter 3 of 2011-12 Financial Year:

1. Revisit all of the original stakeholders to seek feedback.
2. Review the current packages and training materials, considering the feedback. revising as appropriate
3. Cascade the results of the feedback and any changes made to the training materials or processes to the Field Team
4. Final communication to stakeholders In Jan 2012

Headline Changes to New Entrant Training

The full detail of the changes can be found attached at **Appendix B** attached, but the **headlines** are:

- Many minor changes have been made to slides and supporting material to provide clarity
- The timetable will be reviewed in Q4
- The requirement for all newly appointed Agents to attend classroom has been clarified to say this must be the Officer In Charge of the branch and the 2 day refresher course for existing partners considered
- Improvement made to the checking of Prep box information to ensure all out of date material is removed before despatch
- Improvements planned for EASE navigation when the move to SharePoint is completed
- Enhancements made to the presentation of Grapevine throughout all training and Post Transfer Contact all security sessions reviewed with the Security Team
- User enhancements to Performance Standards Assessment (PSA) delivered
- Compliance Audit in Post Transfer Contact (PTC) process , moved to 3 month visit to reduce length of day at 6-9 month and to address any Compliance issues at an earlier stage
- Competent and confident Field Support Advisor's (FSA) now to deliver 3 month Post Transfer Visit (PTV)
- Bespoke PTC process introduced for PO Local

Next Steps

- Deliver training to FSA's through WTLs in Jan/Feb 2012
- Send report out to all stakeholders- All stakeholders will receive a copy of this report and appendices w/c 23rd January 2012
- All new materials will be deployed in training from February 2012.

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- Through Q4 complete and deliver new training package for Mains branches
- Update classroom timetables and materials following the Sales & Service Team review
- Pilot the new offer for all PO Local branches- including classroom training for new Operators

Introduction & Background

The Pilot Review

In April 2011, the new entrant training offer for both classroom and on-site, was revised and deployed in pilot for the remainder of Q1 & 2, with an intention to review in Q3.
The headline improvements included:

- An enhanced and updated package of pre-work including on-line Compliance training and testing and revised product distance learning packs.
- Classroom training mandatory for all new Agents.
- A consistent training offer across all segments, including conversational selling skills, skills to increase remuneration and to complete compliant transactions, to conform to Branch Standards and deliver great Customer Experience, with the consequences of failure to comply understood.
- Duration of course increased by one day to accommodate this.
- On Site Training - New Tools introduced to protect our Brand and to support new Agents to grow their remuneration by focusing on their specific customer base.
- Failure to demonstrate skills from Classroom Training challenged and recorded and reported to Contracts Advisors with hands on support given.
- Balance Support -now supports Agents to produce their first Branch Trading Statement
- Post Transfer Contact – enhanced to include extra support and checks through visits and telephone support in the first year.
- Bespoke Packages – having the capability to react in a timely manner to the introduction of all new Post Office® Formats, train in remote locations using mobile kits with classroom session "lifted off the shelf" specific to Branch and to react effectively to the needs of the Network and provide quality training.

Commencing the review

The following stages were planned to deliver the pilot review in Quarter 3 of 2011-12 Financial Year:

1. Revisit all of the original stakeholders to seek feedback.
2. Review the current packages and training materials, considering the feedback. revising as appropriate
3. Cascade the results of the feedback and any changes made to the training materials or processes to the Field Team
4. Final communication to stakeholders in Jan 2012

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- **Revisit all of the original stakeholders to seek feedback**

All of the original stakeholders were approached for feedback on the piloted training package, and were asked to submit feedback using the Lose, Change & Keep approach that had been used successfully in the original project.

- **Review the current packages and training materials, considering the feedback:**

Engagement was undertaken with all of the Field Team Leader owners of the training materials and classroom sessions, to go through the stakeholder feedback and deliver any changes or enhancements made as appropriate.

- **Cascade the results of the feedback and any changes made to the training materials or processes to the Field Team**

There will be a number of training events early in Q4 to cascade the results of the review and give detail of any/all changes to formats, packages and materials used for training in Classroom and on-site including the Post Transfer Contact Process. These will be led by the Field Team Leaders with their teams, following their own event on 12TH January 2012.

- **Final communication to stakeholders January 2012:**

All changes will be communicated to the stakeholders during January/February 2012.

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Stakeholders Approached for Feedback

Directorates:

- Network — Julia Marwood
- Operations — Paul W Martin
- Compliance — Paul Meadows
- Agents Policy & Contracts — Tracy Marshall
- Legal — Susan Crichton
- Marketing — Sarah Munro
- NFSP — Anita Turner
- Sales & Service — Michael Larkin
- Sales & Service — Julie Thomas

Other stakeholders:

- Network Services Field Support Team – Regional Managers, Team Leaders, Field Support Advisors, Scheduling & Admin Team and Field Change Advisor

Stakeholder Feedback

All Internal stakeholder feedback is detailed in **Appendix A**

Output:

Internal Stakeholders

Areas highlighted by our Internal Stakeholders that should be considered for removal.

Areas that our Internal Stakeholders believed should be changed.

Areas that our Internal Stakeholders believed should remain.

Other areas where issues were raised by Internal Stakeholders.

Proposal:

All Feedback provided has been considered / included in the review of the New Entrant Training Offer.

Gathering the evidence – MI

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Throughout the pilot, supporting MI was collected to identify strengths and weaknesses in the training programme. These are the headline results:

Performance Standards Assessment (PSA)

This action planning tool is used throughout both the classroom and on-site training, to track the progress of candidates and their confidence levels as they develop their skills and knowledge. The following headlines are taken from 59 branches within the pilot:

- **82%** scored a **Green** rating in classroom training
- **18%** were at **Amber** – with development actions identified, agreed and cascaded
- **90%** scored a **Green** rating during on-site training
- **7%** were at **Amber** – with development actions identified, agreed and cascaded
- **3%** were **Red** – with development actions identified, agreed and cascaded

\PSA tracker v1 2.xls

In all cases the Performance Standards Assessment will be followed up at the 1 month phone-call and 3 month visit to the branch. Further support will be given and if necessary an additional training intervention visit will be completed.

Conversations

During the classroom and on site training, all candidates are trained and coached to deliver the Minimum Service Standards Conversations. At the 3 month and 6-9 month visits as part of the Post Transfer Contact process, these are observed and further assessed to establish any further support and coaching that may be required.

Using a sample of 124 candidates and a range of 17 different conversation area's, the results were disappointing. In only 2 area's out of 17 was the result either a ''Good'' or ''Top Quality'' performance. Seventeen area's were assessed as either '' Room for improvement or Poor''.

Minimum Service Standards Assessmer

MSS Conversations Summary Pilot sample

Whilst this feedback is disappointing, the anecdotal feedback that accompanied it told a story of a lack of will to deliver the conversations rather than a lack of skills and knowledge of them. The vast majority agreed that they were aware of the conversations and recalled the training, but felt that they had a better idea of what their customers wanted/needed and felt uncomfortable using

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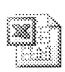
them. This feedback has been passed back to the Contracts Advisor for performance management where appropriate.

New Agent Feedback

Throughout the pilot and at the end of the on-site training, new Agents were asked to complete a brief feedback form about the training package. Here are some headlines:

- **73%** felt they had sufficient training to enable then to process all PO transactions
- **81%** felt they had sufficient training to enable them to prepare the office balance (BTS)
- **100%** understood the requirement to log on to the Horizon system in their own name / user ID, and were able to tell us why this important.
- Only 8 out of 48 **(17%)** felt there any areas where they needed more training / support. This was primarily about accounting.
- All but 1 person understood the branch standards requirements and their responsibilities in regard to them.
- **100%** of people found their time with the training team worthwhile.



Customer Satisfaction SUMMAR

What is new? - Changes to the Classroom & On site Training Packages and Post Transfer Contact Process for new entrants

The full detail of the changes can be found attached at **Appendix B** attached, but the **headlines** are:

- Many minor changes have been made to slides and supporting material to provide clarity
- The timetable will be reviewed in Q4 once the outputs of the Sales & Service Team review have been included in the sessions
- The requirement for all newly appointed Agents to attend classroom training has been clarified to say this should be the Officer In Charge of the branch and where they are an existing partner, the 2 day refresher training should be considered as an alternative to the full 6/8 day offer.
- Ready to Serve document reviewed to include some weekly actions rather than all daily
- Confidential waste instruction added to Ready to Serve Document
- A bespoke Ready to Serve Document has been created for PO Local
- Improvement made to the checking of Prep box information to ensure all out of date material is removed before despatch
- DVD’s are now embedded within the classroom sessions

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- General comments section added to PSA regarding site issues for follow up during the PTC.
- Improvements planned for EASE navigation when the move to SharePoint is completed
- Enhancements made to the presentation of Grapevine throughout all training and Post Transfer Contact
- Security sessions reviewed with the Security Team
- User enhancements to PSA delivered
- Question added to SharePoint to detail opening time after transfer - to inform decision about scheduling of day 1 of on site training
- Compliance Audit in PTC process , moved to 3 month visit to reduce length of day at 6-9 month and to address any Compliance issues at an earlier stage
- Competent and confident FSA's now to deliver 3 month PTV in addition to the continued role of the Team Leaders
- Bespoke PTC process introduced for PO Local
- Improvements to supply of DDA and Welcome packs for new Agents secured with HR.

Next Steps

- Deliver training to FSA's through WTLS in Jan/Feb 2012
- Send report out to all stakeholders- All stakeholders will receive a copy of this report and appendices w/c 23rd January 2012
- Return to BAU revision timetable for maintenance of materials
- All new materials will be deployed in training from February 2012.
- Through Q4 deliver new training package for Mains branches
- Update classroom timetables and materials following the Sales & Service Team review
- Pilot the new offer for all size of PO Local branches- including classroom training for all new entrants