POL00374558

Branch Support Programme

Programme Board – "to-be" processes

7th November 2013

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Our commitment to branches – What should we sign up to?

POST OFFICE

VISION– Trusted partnership working together to deliver for our customers. Together, we are the Post Office

LEADERSHIP

- Visible, accessible
- Seeks to understand with an open mind
- Genuine, authentic, fair and courteous
- Situational/relevant
- Collaborative at all levels
- Committed to deliver – not turning a blind eye

EXPECTATIONS

(1) Easy to do business with

(2) Treat people as individuals

(3) We'll listen, act and keep you informed

(4) Talk to the person first

(5) Role model POL and personal brand

DEVELOPMENT

Knowledge

- branch/network/product awareness
- Wider business awareness

Skills

- Tone of voice, clear and concise
- Customer care skills
- Listening skills
- Problem management

MEASURES – (1) individual branch feedback (2) Escalations (3) Complaint numbers (4) spmr/colleague engagement (5) Call quality handling (6) Compliance/conformance (7)Sales (8) Contact volumes (9) Business growth/sustainability

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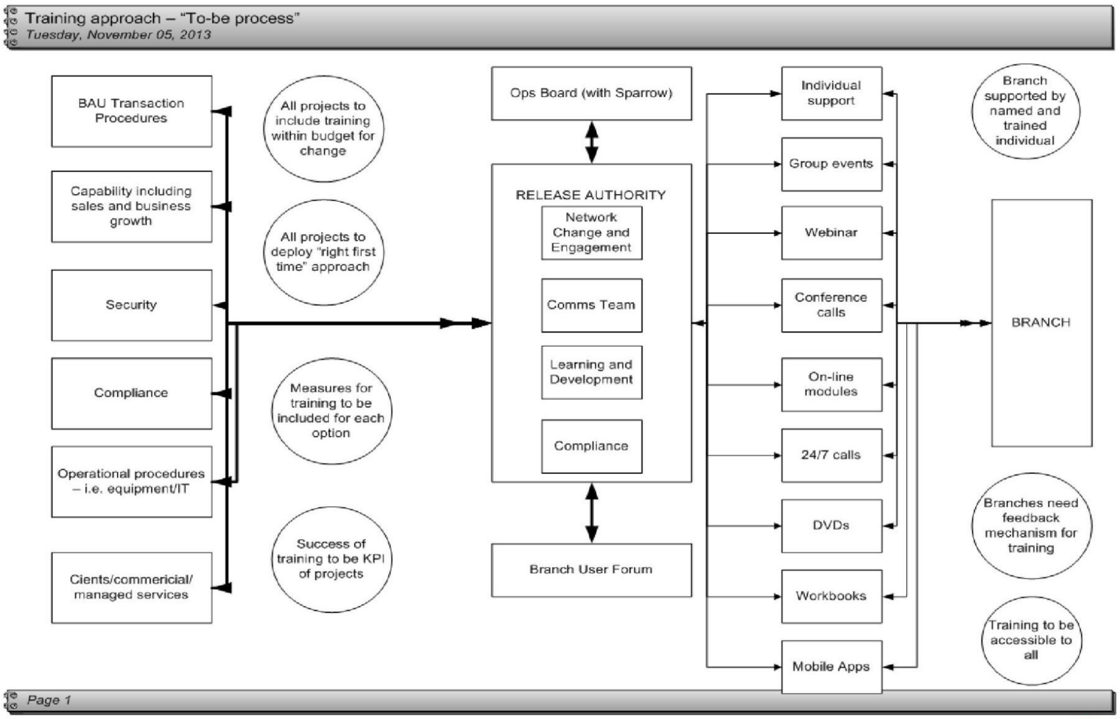
Training approach



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Communication Vision

Communication vision – "to be" principles
Wednesday, November 06, 2013

PERSONAL
- Talk to people
- Treat them as people
- Use it to build relationships
- Warm yet professional

SIMPLE
-Only use words you need
- Clear and concise

CO-ORDINATED
- Agree who needs to know what and when
- Don't overload
- Visibility
- Share
- All recorded

RELEVANT
- Know your audience
- Tailor messages
- Multi-channel

ACCURATE
- Make sure the content is right
- Get the right people to input

TIMELY
- Give people time to digest before change
- Share with colleagues in advance

Release authority – All communications to be approved by release authority, made up of an agreed stakeholder group which is linked to Training Forum and business change process. This includes review of standard letters etc used by branch and customer facing teams. General rule of no clients to communicate to branches directly.

Measurement – All communications to have a success measure.

Recording and reporting – All communications to be documented (and recorded where appropriate) and accessible

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IT Vision

IT vision
Wednesday, November 06, 2013

To provide effective support and meaningful MI to colleagues, POL customers and clients, enabling sales and improving support.

Customer Requirements
- Customers know what products are available in-branch and on-line
- Customers know where our branches are and when they are open
- Transactions are easy for customers
- Customers have a choice of multi-channel ways of doing business with us

Branch Requirements
- Transaction processes are easy to follow
- Multi-channel access for help and support
- Ability to view and store history of contact requests
- Up-to-date support materials including Horizon On-line help. More user friendly, improved search engine and ability to split screens
- Warm transfer between business teams

Network Requirements
- Full view of branch history and record (restricted where appropriate)
- Flexibility to add, delete, change categories to align to other teams
- Ability to view and store history of contact requests
- Generate forms, templates, letters and automatically up-date central data systems
- Run reports as required and produce meaningful MI

Business Requirements
- Ability to see, manage branch interaction
- Ability to understand branch, network, product, client and supplier performance
- Accurate, one version of the truth with one central system for up-dating supporting
- simple, integrated transaction and client processes (eg. Managing cash and stock using different systems)

Tools Required dependent on IT Road Map, Service Integration and future structure.

Contact centres with call recording, answered at source and the facility to warm transfer between POL teams and suppliers..

More flexible tools in branch, Tablet, Mobile Phone, Email enabled (eg via Horizon),

Internal people directory up to date with line management details and team roles and responsibilities. Search engine to enter key words to identify who can help or resolve issues.

A single software product capable of providing the above requirements, used consistently throughout POL providing one view of colleague journey and/or linked to suppliers.

Benefits.

Up to date and consistent master data flow to feed internal colleague and client MI requirements and external websites.

Branch contact requests answered straight away and transferred without hang up and redial.

Ability to contact branch through more flexible methods and at a time to suit branch.

Accurate record of contact request and resolution.

Less time wasted in branch through repeated contacts and duplicated calls.

Improved colleague and customer journey/experience.

Quality MI providing the ability to view performance, identify trends, support branches more effectively and prevent loss

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Pre-appointment approach

Pre-appointment process – guiding principles
Wednesday, November 06, 2013

We want applicants and incoming agents to feel…………..

INFORMED
- They know what their responsibilities will be
- They have an awareness of what it will be like to operate a branch
- They are kept up to date throughout the process
- They are aware what they can expect from Post Office to support them to grow their business

SUPPORTED
- One point of contact throughout the process
- They know where to go to for help if needed
- Consistent quality regardless of the model or person delivering support
- Individual induction, training and development plan to suit their needs

KNOWLEDGEABLE
- Trained how to operate the branch
- Trained how to balance the branch
- Trained how to manage the branch
- Trained how to go the business
- Knowledgeable of the wider business and expectations

CONFIDENT
- Able to deploy the training

PART OF POST OFFICE

We want our outgoing agents to feel…………..

INFORMED
- They are pro-actively informed of the progression of the application process
- They can support the applicant where necessary

SUPPORTED
- One point of contact throughout the process
- They know where to go to for help if needed
- Consistent quality of intervention

VALUED
- Recognised for the contribution they have made to the business

Ideas for pre-application include awareness events, "find out more" literature etc

Dependent on structure review for owning application process

Training approach also needs to be revised, including options for paying

Also dependent on field structure review

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Operational support model

Operational Support Model – "to be"
Wednesday, November 06, 2013

Expert Domain Teams
This would include the likes of Finance Service Centre, Network Teams, Agent Remuneration, etc

Branch Support Line
Transaction processes
Accounting Process
Business policies and procedures
Contact requests
Royal Mail
Escalations
Stock requests
Branch complaints
Branch closures

Security
Robbery
Burglary
Personal emergencies
Grapevine

Cash
Coin changes
Note changes
ATM requests
Bureau

IT/Equipment
Horizon
Telephones
Safes
Alarms
Post & Go
ATMs
Paystation
Scales
Lottery
AEI
Date stamps
Signage
Roller-cash
Mobile vans
Career wear
Security cases
Property & Facilities

HR
Resignations
Recruitment
Remuneration
Sick
Holiday/Leave
Registering of assistants
Telephone reimbursement
Contractual enquiries
Access to learning and development
Access to employee recruitment and support

Principles would be ability to warm transfer. Option to have funnel approach or multi-numbers

Longer term vision would be multi-channel access 24/7

Branch

Shared logging reporting system – all teams whether point of contact or expert domain to use same logging system to see branch contact record

Consistent training and knowledge – all teams to be trained in line with the vision

Problem issue and resolution – supporting business processes to review branch contact to understand repeat branches, issues or wider business problems

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Physical support model

Physical Support Model (Separate Central Support function may be developed – part of wider business structure review)
Wednesday, November 06, 2013

Branch Relationship Team

- 4000 Mains Branches – supported by Relationship Managers who have c.20 branches. Intensive support to build capability
- C.7200 Locals and SPSO branches – supported by a Relationship Manager who is responsible for c. 100 branches. More remote support to build and sustain engagement, deal with operational issues and call on business experts to grow branch business
- Supported by desk based admin support. Roles to be clearly defined. Data team to be in place to support. Works on principle of telephone resolution to support in first instance where possible

Branch Operational Support

- Field Support Advisors – designed to be specialists in branch operational training and support
- Dependant on decision regarding where training sits in the organisation. Could be an argument that operational and sales training all sits within one place
- Individual skill set requirements to be broken down in this area – i.e. audit, classroom training etc

Branch Sales Support

- Sales Development Team
- Regional Sales Team/ Crown Sales Team
- Sales Capability Managers
- Telephone Account Management Team
- Mails Development Managers

Branch Physical Change

- Field Change Advisors
- Network Change Advisors
- Plan would be to merge the two roles

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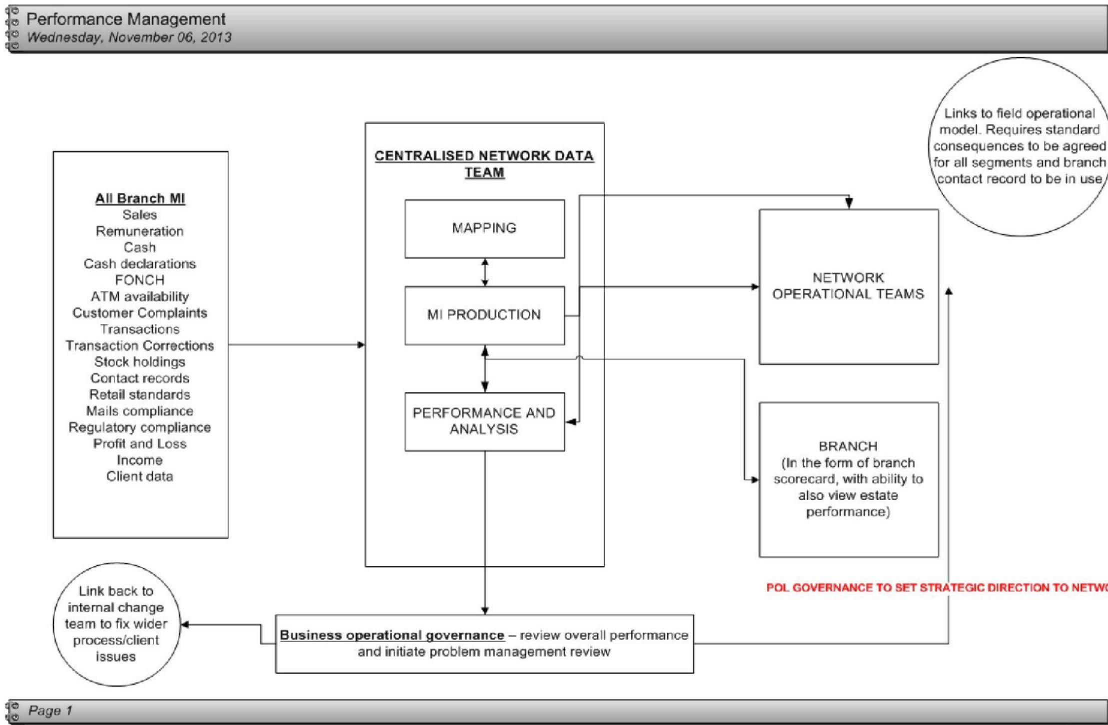
Performance Management



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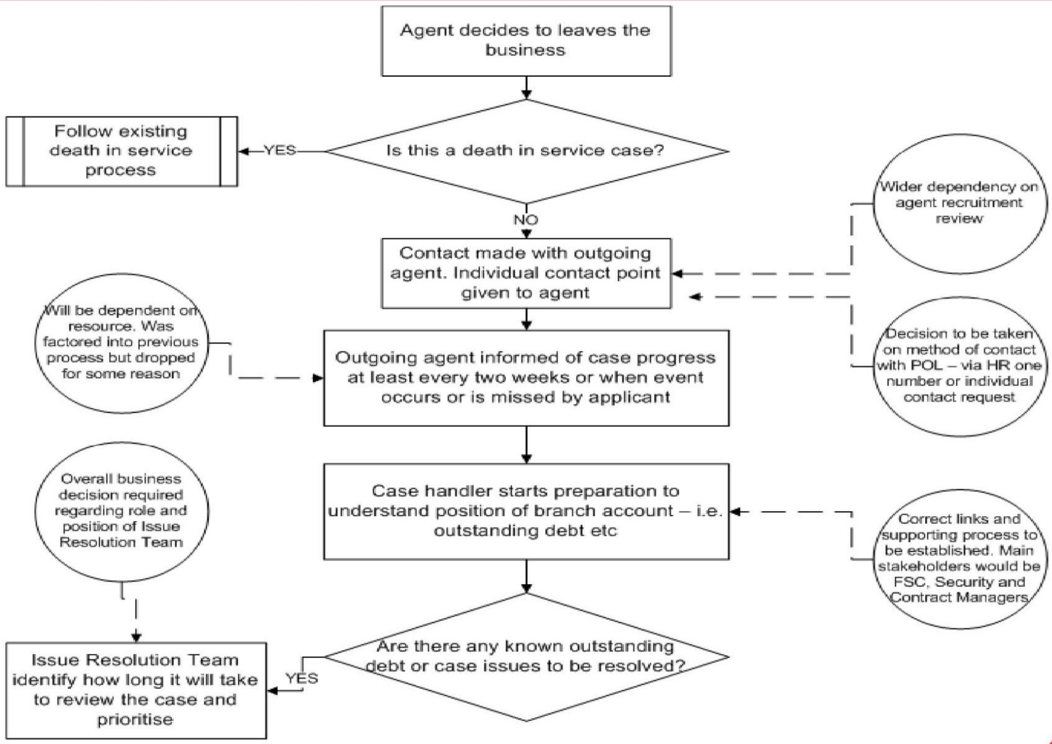
Exit process – no performance issues



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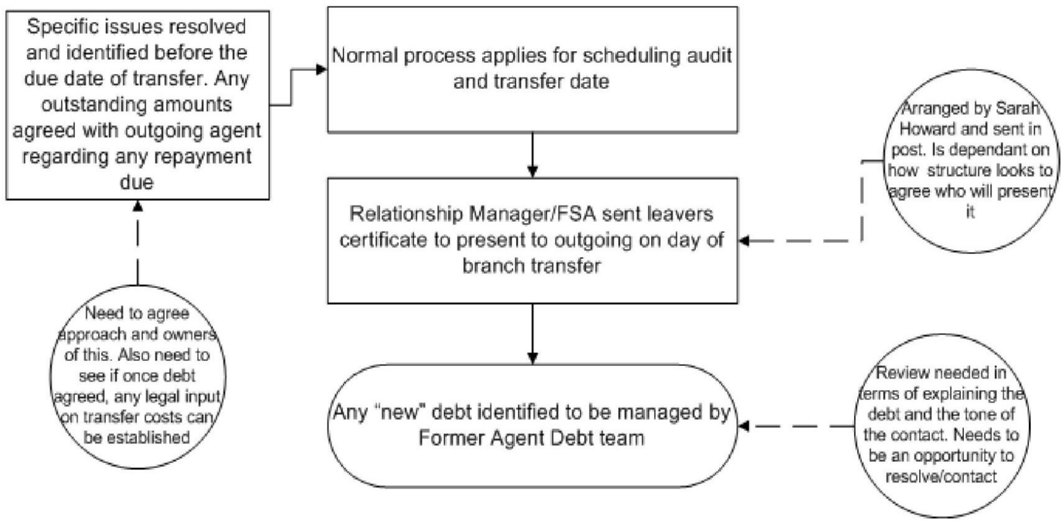
Exit process – no performance issues continued



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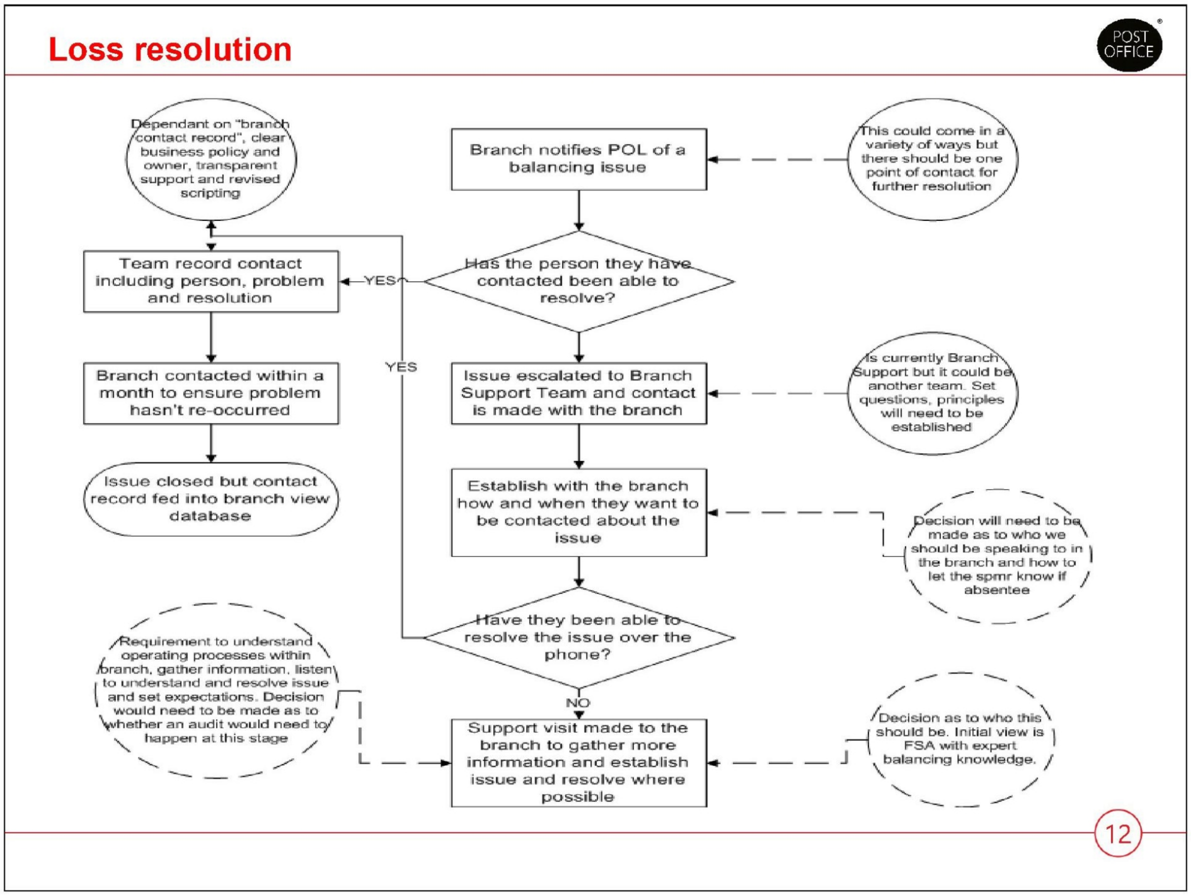

This process would look slightly different if a loss was identified at a random audit.

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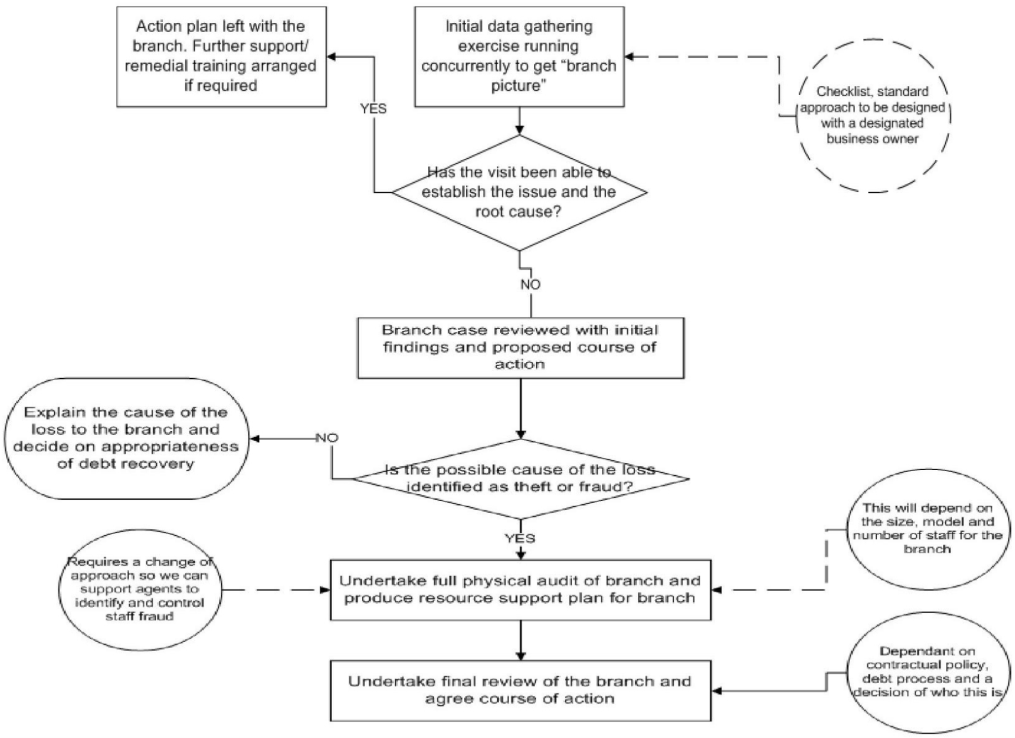
Loss resolution - continued



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Loss resolution - continued