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Horizon Additional Content Trial Report & Findings

Authors: Antony Durdin
Dave Ireland

Signed Date

Authorised: Sue Harding
Business Partner
Group Change & IS

Authorised: Tim Batterbee
Project Manager
Business Partner Team –
Group Change & IS

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Document Control

0.1 VERSION HISTORY

Version	Dated	Change Details
0.1	11 December 2006	Initial draft for discussion within the project team
0.2	21 December 2006	Revised draft following initial review amongst project team
0.3	10 January 2007	Final draft for wider review
1.0	6 February 2007	Final Version for submission

0.2 DOCUMENT REFERENCES

Ref.	Title	Version Number	Reference
1.	High Level Blueprint Document	1.0	RS1138
2.	Intranet Exploitation Assessment	0.3	IEA02
3.	Proposal to cease production of Operations Manual booklets in hard copy format	0.3	Feasibility Report RS1051
4.	Automated Stock Ordering Feasibility Report	2.0	
5.	Regulatory Compliance Workbook, January 2006	Final	

0.3 DISTRIBUTION LIST

Name	Title
Ric Francis	Operations Director
Dave Smith	Head of Change & IS
Adrian Baker	Head of Strategy Development
Tim Connold	Delivery, Integration & Assurance Manager
Deirdre Joy	Senior System Manager (Group Technology)
David Gray	Strategy & Architecture Manager
Tom Fitzgerald	Business Solutions Manager
Steve Page	Business Solutions Manager
Karen Hillsden	Business Solutions Manager
Mauro Liverio	Business Solutions Manager
Alana Renner	Head of Engagement & Internal Communications
Ann Cruttenden	Business Partner Network & Sales
Sue Harding	Business Partner Group
Carol Ayres	Business Partner Marketing
Mark Burley	Horizon On-line Programme Manager
Damion Taylor	Head of Accounting, Reporting & MI
Keith Woollard	Head of Compliance
Neil Ennis	Head of Supply Chain Programme
Crispin Beale	Head of Marketing Services
Tim Batterbee	Project Manager, Business Partner Team, Group Change & IS
Mike Gallagher	Senior Design Authority

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Alan Brompton	Business Consultant (Fujitsu Services)
Dave Baldwin	Business Unit Director, Post Office Account (Fujitsu Services)
Liam Foley	Director, Business Development, Post Office Account (Fujitsu Services)
Steve Ironside	Account Manager, Post Office Account (Fujitsu Services)
Giacomo Piccinelli	Customer Solutions Architect, Post Office Account (Fujitsu Services)
All Contributors, see 0.6 Acknowledgements below	

0.4 DOCUMENT AND CHANGE CONTROL

Changes to this document will only be made through the C&IS Change Control procedure. For these purposes the document owner shall be the C&IS Project Manager, Tim Batterbee.

0.5 GLOSSARY

AP-ADC	Automated Payments – Additional Data Capture
APOP	Automated Payments – Out Payments
C & IS	Change and Information Systems
CBT	Computer Based Training
CFPO	Converted Franchise Post Office
CYC Form	Crown Your Colleague Form
DVLA	Driver and Vehicle Licensing Agency
EDG	Electronic Data Gateway
HLBP	High Level Blue Print
HTML	Hyper Text Mark-up Language
iPlatform	Royal Mail Group's new Intranet Platform
IPS	Identity and Passport Services
MSPO	Modified-contract Sub Postoffice
NBSC	Network Business Support Centre
OFp	Operational Focus <i>plus</i>
OMI	Operations Manual Interim
PCs	Personal Computers
POL	Post Office Limited
RMG	Royal Mail Group
SIP	Systems Integration Partnership
SLA	Service Level Agreement
SPSO	Scale Payment Subpostoffice

0.6 ACKNOWLEDGEMENTS

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Denise Hutchinson, Manager, Burnham SPSO
Janet Polsakowska, Manager Caversham CFPO
John Naish, Sub Postmaster, Milton under Wychwood SPSO
Pat Patel, Manager, Twyford MSPO

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Tracey Stacey, Assistant Branch Manager, Reading Crown Office

The project team would also like to thank the following people for their involvement in ensuring that the trial content was prepared and delivered to the branches within a very demanding timescale.

Allan Hodgkinson, Horizon Design Authority, Fujitsu Services
Andy Corbett, APADC Reference Data Manager, Post Office Limited
David Wilcox, Reference Data Manager, Fujitsu Services
John Burton, Horizon Programme Manager, Fujitsu Services
Mark Cunningham, Production Manager – Sales and Service, Post Office Limited
Rabia Cody, Reference Data Manager, Post Office Limited
Steve Lewin, Application Designer, Fujitsu Services
Steve Port, Reference Data Business Analyst, Post Office Limited

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1. EXECUTIVE SUMMARY

Royal Mail Group (RMG) launched its new Intranet platform (iPlatform) in November 2006. This new platform substantially increases the flexibility and capability of the Post Office Intranet. An investigation was initiated to establish how this capability might be leveraged to deliver increased usage and access to the business and its employees across the entire network.

In parallel to this wider assessment activity, a technical trial was undertaken across five branches. The trial, as reported in the sections that follow, presented four items of additional content within the Horizon application to demonstrate that intranet-type content could be displayed across the branches using existing technology.

The four elements made available included the **Operational Focus Manual Interim** and **Operational Focus plus** publications, **Regulatory Compliance test material** allowing on line completion, **a one-way corporate form** (Crown Your Colleague) and a short **set of self-help instructions** detailing how to reset the counter printer. These were made available for three weeks in branches across the Thames Valley region selected to represent the characteristics of the branch network.

Feedback from the branches was generally positive to new uses for existing technology with some, such as Reference Material, being more positively received than others such as the Regulatory Compliance test. As these trial elements were created using existing technology it demonstrates that a cost-effective approach to the provision of additional functionality is readily available. However, the full impact on support and delivery teams must be identified before firm recommendations can be made.

In addition to the direct feedback from the branches a number of observations were made that may impact future use of Intranet connectivity across the entire network. The only approach that can universally provide connectivity to all branches requires that the Horizon terminal is used as the standard access point. Whilst it is considered technically feasible to connect the Intranet to the terminal (work is in progress to confirm this), there remains significant doubt about the ability of the terminal, as currently configured, to provide an acceptable user interface.

With emphasis on delivering customer service and transactions as a priority for all counter staff, accessing new and additional content may only be feasible outside of normal working hours or practices. The impact this could have on working regulations, shift patterns or branch dynamics has not formed part of this review but it should not be underestimated and requires further investigation.

If the Horizon terminal and current working practices will prevent intranet access for practical reasons, alternative methods will need to be identified. Limited real estate and access to standard PCs in many branches present a further challenge.

The project team acknowledges that a previous business case for the provision of PCs across the network was prepared and subsequently rejected. This work was completed some four or five years ago and is believed to have been passed on to Royal Mail Group for further consideration. It has not been possible to gain an update on any progress or

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locate the business case to analyse the assumptions and metrics within but it is understood that there is no intention to revisit it at this time.

The resultant conclusion from these findings is that there is no single approach to delivering the Intranet that can be guaranteed to be successful across the entire branch network. This contradicts the original guiding principal for the trial that all branches must be treated equally.

Based on the findings above, the following recommendations are made. Some of these are already in progress and where appropriate, this is noted. The recommendations are not presented any specific order. All recommendations relevant to the exploitation of the Intranet will be carried forward into the *Intranet Exploitation Assessment Document* (reference IEA02).

1. Implement on-line stock ordering as a matter of urgency to provide confidence and reliability in the supply chain. Examples of incorrect, incomplete and duplicated orders represent significant opportunities to reduce costs and improve business efficiency¹.
2. Identify clear business requirements for intranet expansion to cover the entire branch network in order that solutions can be designed to meet true business needs.
3. Identify the capability and feasibility of connecting the Post Office Intranet to the Horizon terminal. Work to establish the technical feasibility is in progress but it should be extended to cover the suitability of the current hardware to meet future functionality requirements.
4. Investigate access options to connect the branch network to the Intranet. If the Horizon device is not considered suitable then wider access options must be considered.
5. Identify further process automation options to maximise the current Horizon system functionality and remove existing manual operations.
6. Confirm the possibility of, and requirements for, the provision of Operations publications through the Horizon terminal and initiate a project to deliver them.
7. Assess the impact on current processes, procedures and teams to render content in a format that is suitable to being published electronically via different channels.
8. Investigate production of product-related training material that could be made available via Horizon utilising both the AP/ADC and APOP functionality.
9. Investigate further options to provide self help material and reduce the number of calls made to the Horizon Service desk.
10. Investigate work to ascertain the range and severity of the anomalies reported by the branches within current Horizon transactions to ascertain potential improvements. This may lead to some enhancements and improvements or may highlight those that are already planned or in progress.
11. Improve printing capability and identify potential ways to enhance the details printed or displayed on receipts and labels².

These recommendations will be referenced in the *Intranet Exploitation Assessment* document (Reference IEA02) to be published as part of the Intranet Exploitation Assessment exercise. Please note however that recommendations 10 and 11 above

¹ Automated Stock Ordering project has produced a Feasibility Report which is currently being reviewed.

² A project to replace counter printers is due to commence early in 2007.

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(with the exception of the potential for on-demand printing within recommendation 11) relate specifically to the current Horizon implementation. Consequently these are not considered to impact future exploitation of the Post Office Intranet and will not be reflected in *IEA02*.

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2. INTRODUCTION & BACKGROUND

Royal Mail Group (RMG) launched its new Intranet platform (iPlatform) in November 2006. This new platform substantially increases the flexibility and capability of the Post Office Intranet and an investigation was initiated to establish how this capability might be leveraged to deliver increased usage and access to the business and its employees across the entire network.

A request was submitted to Fujitsu Services to supply resource, under the Systems Integration Partnership (SIP) agreement, to ascertain ways to “exploit the Post Office Intranet”. In particular, the challenge set by Ric Francis (Operations Director) was to make the Intranet available in all branches.

After initial work to assess the scope of the exercise a high-level blueprint (HLBP) document was submitted, and approved. It included the two elements below.

- An Intranet Trial within a defined number of branches
 - This trial was to take place over a three to four week period before the December peak-time activity commenced
- A wider, benefits-driven, assessment of ways in which the Intranet could be exploited to support the Post Office business.

In defining the scope of the trial activity two guiding principals were provided by POL Senior Management.

All branches must be treated equally with content provided in a consistent manner. Whilst recognising the inherent difficulties of both electronic and manual content delivery any mixture of approaches should be avoided due to cost and inefficiency. The impact of any recommended course of action must also be contractually viable whether relating to network providers or the working practices of branch employees and staff.

Provision of PCs to all branches is not to be considered at this stage. A previous business case for the central provision of PCs as a standard access mechanism was previously prepared and rejected by the business.

The trial activity and the findings are outlined in the following sections. They will also be used as part of the wider assessment exercise and will be included in the *Intranet Exploitation Assessment* document (Reference IEA02) outlining the potential exploitation of the Post Office Intranet. These findings and recommendations will be presented to the Executive Committee for their review.

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3. APPROACH

3.1 INITIAL APPROACH

The initial approach focussed on the connection of web servers to the Horizon network to enable the demonstration of basic intranet connectivity, content delivery and functionality on the Horizon terminal.

Whilst conceptually possible, many aspects needed to be understood to ensure that the operation of the live system would not be compromised. The list below identifies some of the issues.

1. The implications on performance were not clearly understood. Detailed analysis would be required to understand whether this approach represented limited or manageable operational risk to the live system.
2. The impact on risk, contractual obligations and performance against Service Level Agreements (SLA) was also not clear and required analysis and confirmation that any impact would be minimal and manageable.
3. The Horizon screen presents content at the 640x480 resolution, and is a touch-screen interface with no mouse. This imposes significant limitations on the way content can be presented and substantially impacts the user interface.
4. Procurement, configuration, testing and verification of any hardware to be connected to the network, to ensure that items above were not compromised, was not possible within the proposed trial window.

Consequently, the initial requirement was analysed in more detail. Based on the collective knowledge of the network and the technology it provides, it was agreed that the delivery of the content was more important than the means by which it was made available.

Therefore, it was recommended that the content could be delivered using existing technology to provide a meaningful and secure trial within the live environment. Most importantly, this approach was designed to deliver a cost-effective exploitation of the existing network and technology to meet the agreed objective.

This approach, and the content trialled, is outlined in the section that follows.

3.2 REVISED APPROACH

Working with business functions the four types of content considered to offer the greatest potential benefit were selected and are listed below.

1. Operational reference material
2. Training material currently delivered in hard or physical media
3. An operational or corporate form
4. Self help Material

Four specific pieces of content to be trialled were then selected as described below.

3.2.1 Trial Content

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3.2.1.1 Operational Reference Material

Two editions of the **Operations Manual Interim** and **Operational Focus *plus*** content were rendered into HTML format and displayed via the Smart Help interface and are listed below.

1. Operations Manual Interim Euro-Checking instructions published 9 November.
2. Operational Focus *plus* detailing the Christmas arrangements published on the 23 November.

3.2.1.2 Regulatory Compliance Material

Two aspects of the **Regulatory Compliance Workbook** were presented to assess the feasibility of delivering Computer Based Training (CBT) and achieving greater control over adherence to compliance standards.

Firstly, using an AP/ADC transaction a **read-receipt** was created with details being sent across the Electronic Data Gateway (EDG) and captured in a recipient file on the Post Office side of the EDG.

Secondly, as presented in the Regulatory Compliance Workbook, the **Final Assessment Test** was rendered into an AP/ADC transaction with results being captured in the same file. These results carried a different and therefore identifiable transaction reference to the read receipt above.

3.2.1.3 Crown Your Colleague Form

The **Crown Your Colleague Form** (CYC) was rendered into an AP/ADC Transaction with details being sent to the same recipient file as above. This also carried a separate, and therefore distinguishable, reference.

3.2.1.4 Self Help Material

Seen as a significant opportunity to provide help and support to the branch network a **self-help** page was also made available. Presented in both graphical and textual format, this fourth element provided detailed instructions on how to reset the counter printer.

Screen shots of this content can be found at Appendix I – Trial Content.

3.2.2 Participant Branches

The branches selected to participate in the trial are listed in the table below.

Table One – Participant Branches

Branch Code	Branch Name	Branch Type	Branch Contact
002939	Reading	Crown Office	Tracey Stacey (Assistant Branch Manager)
134939	Twyford	MSPO	Pat Patel
102939	Caversham	CFPO	Janet Polsakowska
053946	Burnham	SPSO	Denise Hutchinson
159137	Milton under Wychwood	SPSO	John Naish

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Initial identification of branches was conducted by Steve Moakes (Transformational Change Manager). Subsequent communication and liaison was carried out by Dave Ireland and Antony Durdin as outlined below.

3.2.3 Trial Duration

The trial ran for a period of three weeks from Monday 13 November to Saturday 2 December.

3.2.4 Trial Communication

As detailed below, three sets of visits were conducted to the participant branches.

3.2.4.1 Initial Branch Visits

Initial visits were made to each of the branches on Tuesday 7 or Wednesday 8 November to outline the objectives of the trial and the expectations of each branch. A communication pack was prepared and left with each branch along with appropriate contact numbers in the event of difficulties³.

3.2.4.2 Interim Visits

Part way through the trial each branch was visited again to ensure that the Christmas Arrangements were available on all of the counter positions. A feedback form was also given to each branch contact and is provided at Appendix II – Branch Trial Feedback Form.

3.2.4.3 Post Trial Feedback Visits

Due to staff availability and Christmas activity final evaluation visits could not be conducted until Tuesday 5 and Friday 8 December. For the same reasons the Twyford branch was unable to spend time reviewing the material until January 2007 and was therefore not consulted. As records show that no use of the transaction material was made, no further evaluation was arranged at this branch.

At the time of visiting, the Caversham branch was extremely busy and with the same level of activity recorded as at the Twyford branch no further visit was scheduled.

³ This exercise was not linked to the Network Business Support Centre (NBSC) and all support and assistance enquiries were handled by the project team.

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4. BENEFITS AND METRICS

4.1 PERCEIVED BENEFITS

Although detailed work to quantify the benefits that this approach represents is not being conducted at this stage it is evident that they are potentially numerous. Some examples of these are shown below.

1. The processes and work flows are already in place to produce the proposed content and therefore additional content of its type can be supported at relatively low cost.
2. No new technology is required to deliver content in this way.
3. The technologies are understood and maintained by in-house Post Office teams.
4. The incremental cost of delivering additional content is likely to be less than the current costs in hard-copy production and delivery.
5. Additional content, although different in nature, can readily be presented across the network.
6. Since the processes, teams and technologies already exist, the timescale to deliver new and additional content may be less than that for a detailed analysis and feasibility of the initial approach.
7. This interim means of distributing content, if communicated well, could begin to demonstrate value to the branch network and create a foundation for newer ways of working as we move towards Horizon On-Line and its proposed developments.

4.2 TRIAL BENEFITS

For the trial, and wider assessment, the project team identified a number of benefits and corresponding measures which could be used to judge the potential business benefit of making these types of content available via the Horizon Terminal. Eight high-level benefits were identified and are described below.

1. **Business Efficiency** (Bus Eff) – focussing on cost and its reduction
2. **Agility** – focussing on speed of response to change
3. **Knowledge Management** (Know Mgmt)
4. **Employee Satisfaction** (Emp Sat) – Promoting the sense of belonging to Post Office Ltd
5. **Customer Satisfaction** (Cust Sat) – Increased levels of customer service and satisfaction
6. **Client Satisfaction** (Client Sat) – Increased confidence from our Clients in our performance and operations
7. **Compliance** (Comp) – Improved adherence to Compliance standards set by industry regulators
8. **IT Efficiency** (IT Eff) – Improved value from IT spend

Table Two below identifies the Primary (PRIM) and Secondary (Sec) benefits that each of the Trial elements seeks to deliver. Whilst, it could be argued that each option addresses all of the listed benefits in some way, only the key benefit areas have been identified in the table below.

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Table Two – Primary and Secondary Benefits

	Trial Element						Benefit	
	Bus Eff (Cost)	Agility	Know Mgmt	Emp Sat	Cust Sat	Client Sat	Comp	IT Eff
OMI & OFp	PRIM	Sec		Sec			Sec	
Compliance	Sec					Sec	PRIM	
CYC Form				PRIM				
Self-Help	PRIM			Sec				

4.3 TRIAL METRICS

Table Three below outlines the measures associated with the Primary and Secondary Benefits. Some of these measures have been taken from direct observation and quoted statistics whereas others have been inferred through interview with trial participants.

Table Three – Trial Metrics

Trial Element	Primary Measures	Secondary Measures
OMI & OFp	<i>Business Efficiency</i> <ul style="list-style-type: none"> Preparation Cost Printing Cost Distribution Cost Time and Materials for electronic media 	<i>Agility</i> <ul style="list-style-type: none"> Total time from production to arrival at branch
		<i>Compliance</i> <ul style="list-style-type: none"> Must demonstrate that it is being read
		<i>Employee Satisfaction</i> <ul style="list-style-type: none"> Interview with participants
Compliance	<i>Compliance</i> <ul style="list-style-type: none"> Compare against existing level of compliance Time to achieve compliance Current level of reminder activity Ability to deliver Individual and Branch compliance 	<i>Client Satisfaction</i> <ul style="list-style-type: none"> Ability to produce accurate and up-to-date assessment of compliance to relevant standards
		<i>Business Efficiency</i> <ul style="list-style-type: none"> Production Costs Delivery Costs Distribution Costs
		Interviews with participants also used to identify ease of use and practicality
CYC Form	<i>Employee Satisfaction</i>	
	<ul style="list-style-type: none"> Interviews with participants to establish ease of use and practicality 	

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<p>Self-Help Text</p>	<p><i>Business Efficiency</i></p> <ul style="list-style-type: none"> • Number of calls to Service Desk related to printer errors / resets • Average total fix time • Call Duration 	<p><i>Employee Satisfaction</i></p> <ul style="list-style-type: none"> • Interviews to be held with participants to assess ease of use, accessibility, relevance and additional information that could be provided
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5. ASSESSMENT AGAINST METRICS

Each of the sections below outlines, where possible, an assessment against the metrics presented in Section 4.3-Trial Metrics.

5.1 OPERATIONAL PUBLICATIONS MATERIAL

Work has already been completed by Dave Ireland (Network & Product Change Communication Manager) around the benefits to be gained by removing hard-copy versions of the forty booklets that comprise the Operations Manual. A draft proposal (version 0.3) was submitted to Ann Cruttenden (Business Partner Network & Sales) on 10 September 2006 for the removal of hard copies in favour of electronic versions. As this document has not yet been approved, any figures quoted should be considered as indicative and for illustrative purposes only.

The following indication is provided of the potential benefit that could be realised through electronic delivery of the operational publications material.

Table 4 – Operational Reference Material Benefits

Benefit Area	Estimated Benefit / Saving
Production and Distribution Cost (Operations Manuals)	£200,000 per annum (approx)
Production and Distribution Cost (Additional Operations Material)	£475,000 per annum (approx)
Production Cycle Time	7 – 10 working days (approx average)

It is accepted that content generation overheads will remain and that initially some work will be required to create the publication and delivery mechanism. It is also acknowledged that whilst realising savings on print and storage costs it will be necessary to incur an initial recycling cost to remove existing stocks (approx £150,000) and that activity at the NBSC may increase. An approximate 40% increase in calls was predicted but as this should reduce over time, and recycling is a one-off cost, the case for removal of hard copies remains. The tables below provide further detail in support of these projections.

Production costs for the remaining Operational Materials are shown below. Table Five below details recent print costs for the Operations Manual Interim.

Table 5 – OMI & OFp Production Costs

Number of Pages	Instances	Number of Copies	Unit Cost	Average Cost per Copy
4	2	30,000	£2,392.00	£0.08
8	8	30,000	£3,265.00	£0.11
12	13	30,000	£4,392.50	£0.15
16	2	30,000	£5,520.00	£0.18

For the purposes of calculations the total circulation for each publication is assumed to be 29,500 with, where appropriate, an average number of 12 pages.

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Table 6 – Estimated Production Costs

Publication	Frequency per annum	Average No Pages	Unit Cost	Total Cost
CD Version	6	N/a	£1,800.00	£ 10,800.00
Operations Manual Interim	45	12	£4,319.29	£ 194,368.1 3
Operational Focus	52	12	£4,319.29	£ 224,603.1 7
Operational Focus <i>plus</i>	3	12	£4,319.29	£ 12,957.88
Monthly Update	8	12	£4,319.29	£ 34,554.33
Total Cost				£ 477,283.51

With regards to the production cycle, in the case of the Operations Manual Interim, this commences three weeks in advance of the publication date. The electronic version is usually available on the Intranet within seven or eight working days from content submission with hard copies arriving in branches approximately two weeks later. Full timescales are provided at Appendix III – Operations Manual Interim Production Cycle.

Note however that any potential savings associated with these manuals will be dependent upon:

- any electronic version being available to all users;
- material being available in a format that is suitable to the device upon which it is being displayed;
- the ability of the material to support the delivery of organisational compliance and customer transactions, without compromising expected levels of customer service, and
- the ease with which the manuals can be searched or interacted with.

Any shortcoming in meeting these criteria would naturally lead to an increased dependence on the NBSC and other more experienced colleagues and call into question the benefits of a move toward electronic content.

For further evidence on this recommendation and the supporting evidence please refer to the original proposal itself (document reference *RS1051*).

5.2 REGULATORY COMPLIANCE MATERIAL

Regulatory Compliance activity is conducted in a number of ways as listed below.

- Annual training for the entire network spanning a three month period in January⁴

⁴ Regulatory Compliance activity for 2007 is to be conducted during April

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-
- Sub Postmaster training on induction
 - Business as usual training for staff as required
 - Refresher training as changes are introduced
 - Training driven by audit findings

This training covers all four areas of Regulatory Compliance and is delivered through a combination of classroom-based sessions, automated telephony service (provided and administered by a third party for approximately 10,000 individuals in Crown and high-risk offices) and Sub Postmasters' contractual requirements. The latter is evidenced via a receipting function provided within the Horizon system.

Quoted costs (not a complete representation of total cost) for producing and delivering Regulatory Compliance material and the automated telephony service are shown in Table Seven below.

Table 7 – Regulatory Compliance Material Production Costs

Cost Element	Cost
Production of Workbooks	£50,000 for 40,000 Workbooks
Telephony Service	£40,000 for 10,000 members of staff

Currently, the only use of technology for Sub Postmasters to support training of their staff is a Horizon transaction receipt attached to the workbook. This is used as proof that the training has been completed. There is no means of assessing the level of compliance at an individual level outside of the 10,000 individuals referenced above. This leaves an estimated 40 to 50 thousand individuals across the network at the responsibility of the Sub Postmasters.

Theoretically, if the material could be made available to all staff, the following could be achieved.

- Compliance training could be delivered and measured at an individual level;
- Control could be retained within Post Office Compliance team.

However, to be successful the electronic version made available via Horizon needs to replicate the functionality and benefits offered by the use of the third-party voice recognition service. As the cost presented above includes administrative management (from initial delivery through to progress reporting, reminder activity and statistical analysis to identify fraudulent answers) the ability and cost of replicating this internally may prove prohibitive.

Therefore, it appears that in the field of Regulatory Compliance, further detailed investigation and requirements definition would be required before an indication of potential benefit can be returned. That said, the opportunity to supply product and transactional-based training remains and was openly welcomed by those interviewed during the trial.

5.3 CROWN YOUR COLLEAGUE FORM

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With no defined numeric metric being applicable, the benefit observed during the trial is difficult to assess. Based on branch feedback the concept of forms is one that they would very much welcome. In addition, questions were posed over the ability to create a simple messaging or communication function using the existing technology.

Other uses of the form concept were suggested by the branches and are listed below, some of which relate to the automation of specific manual forms.

- Passport Application Receipt & Notice – reference P4921 (Jan 2006)
- Daily Schedule of Driver Licence Applications Received – DVLA reference D762
- Daily Passport Schedule – reference P5035 (08/05)
- Fraud reporting
- Registry of complaints
- CWU information and voting requirements

The ability to complete these activities from the Horizon Terminal was viewed as a positive move as it enabled privacy and allowed for completion without the need to use the back office PC (if it existed). For the non-Crown Offices the concept was further endorsed as this was potentially the only means of accessing such content.

Whilst the concept was favourably received, the technical options and limitations need further investigation. The business need for creating any such functionality also needs to be established before any development is undertaken.

Since visiting the branches we have been able to confirm that some of these issues are being investigated by Tom Fitzgerald (Business Solutions Manager) and his team. An HLPB has been issued that is aimed at changing the Passport Application Receipt & Notice form and where possible automate the process via a Horizon transaction.

The Daily Schedule of **Driver Licence Applications Received** forms part of continuing discussions with DVLA. Investigations are in progress to assess the ability to automate the entire transaction, including the receipt, further updates are awaited.

With regards to the **Daily Passport Schedule**, a number of demonstrations have been made to the **Identity and Passport Service** (IPS) on the benefit of automation. No further development is envisaged as the form is used within the IPS organisation and no commitment to change the process has been observed.

5.4 SELF-HELP MATERIAL

During the trial period the following activity was observed relating to counter printer resets across the network.

Table 8 – Printer Reset Call Log

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Statistic	Total
Total number of calls resulting in a factory reset	25
Number of calls resolved by Postmaster reset	20
Number of calls resolved by Engineer reset	5
Number of one counter branches affected (branch outages)	4
Number of two counter branches affected	9
Percentage of Offices losing at least 50% capacity	52

Work is ongoing at the Horizon Service Desk to analyse some of the routine issues that are handled. The material that was displayed electronically during the trial had been piloted on laminated cards in branches to assess its viability. Other potential material is being investigated.

The figures quoted below have been sourced from this work and are taken from the total number of printer-related calls during May and June of this year.

Table 9 – Indicative Savings Linked to Printer Reset Material

Statistic	Total
Number of Counter Printer calls in May / June 2006	4,730
No calls resolved by factory reset	426
Average call length to talk caller through a factory reset	6 mins and 24 secs
Average number of printer calls per month	217
Average cost per call	£11.40
Potential cost saving (approx)	£30,000

Of the calls received approximately ten per cent were resolved with a reset of the Counter Printer. Through provision of self-help material there is clear potential to reduce the total number of calls made to the Service Desk along with the associated call cost savings. Providing a near instant fix in approximately ten percent of cases using such material represents a potential increase in transaction processing and customer throughput.

Further work is in progress concerning similar issues with Pinpad calls. This demonstrates that with sufficient analysis some of the less complex issue resolution activities could be removed from the Service Desk delivering both cost and efficiency savings.

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6. DIRECT RESULTS & FEEDBACK

In addition to the assessment against the metrics presented in the previous section direct feedback was sought from the participant branches. This feedback comes in two forms as listed below and detailed in the two sections that follow.

1. Quantitative results from the Branch Trial Feedback Form (Appendix II – Branch Trial Feedback Form)
2. Direct Feedback from the branch staff during the post trial evaluation visits

6.1 QUALITATIVE RESULTS

As shown on the Branch Trial Feedback Form, five questions were asked to gauge views on how useful each element had been and could be if it were to be developed further. A scale of 1, Strongly Disagree, through to 5, Strongly Agree, was adopted and the responses are shown in the tables below.

6.1.1 Operations Manual Interim and Operational Focus *plus* Material

Table 10 – Branch Feedback Regarding OMI and OFp Material

	Reading	Burnham	Milton under Wychwood	Average Response
This material was easy to access	4	3	2	3.00
This material was easy to use	5	3	2	3.33
This material (or similar material) would benefit you and your staff?	5	5	4	4.67
This material (or similar material) would enhance your ability to serve your customers	4	5	4	4.33
The Horizon terminal is an appropriate vehicle to display this (or similar) material	4	5	4	4.33

6.1.2 Regulatory Compliance Material

Table 11 – Branch Feedback Regarding Regulatory Compliance Material

	Reading	Burnham	Milton under Wychwood	Average Response
This test was easy to access	4	1	2	2.33
This test was easy to use	4	1	3	2.67
This material (or similar material) would benefit you and your staff?	5	1	4	3.33
This material (or similar material) would enhance your ability to serve your customers	4	1	4	3.00

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The Horizon terminal is an appropriate vehicle to display this (or similar) material	2	DNA ⁵	4	3.00
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6.1.3 Crown Your Colleague Form

Table 12 – Branch Feedback Regarding the Crown Your Colleague Form

	Reading	Burnham	Milton under Wychwood	Average Response
This form was easy to access	4	5	2	3.67
This form was easy to use	4	5	2	3.67
This form (or forms in general) would benefit you and your staff?	4	5	4	4.33
This form (or forms in general) would enhance your ability to serve your customers	N/a	5	4	4.50
The Horizon terminal is an appropriate vehicle to display forms in this way	4	DNA	4	4.00

6.1.4 Self-Help Material

Table 13 – Branch Feedback Regarding Self-Help Material

	Reading	Burnham	Milton under Wychwood	Average Response
This help material was easy to access	3	5	2	3.33
This help material was easy to use	4	5	2	3.67
This help material (or similar help material) would benefit you and your staff	2	5	4	3.67
This help material (or similar help material) would enhance your ability to serve your customers	N/a	4	4	4.00
The Horizon terminal is an appropriate vehicle to display this (or similar) help material	4	4	4	4.00

The table below provides a summary of these results.

6.1.5 Summary of Results

The table below details the average responses to each of the questions for each of the trial elements.

⁵ DNA – Did Not Answer

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Table 14 – Summary of Branch Feedback

	OFI	Compliance	CYC	Self-Help Material
Trial element was easy to access	3.00	2.33	3.67	3.33
Trial element was easy to use	3.33	2.67	3.67	3.67
Trial element (or similar examples) would benefit them and their staff	4.67	3.33	4.33	3.67
Trial element (or similar examples) would enhance their ability to serve their customers	4.33	3.00	4.50	4.00
The Horizon terminal is an appropriate vehicle to display this (or similar) trial element	4.33	3.00	4.00	4.00

Notes

1. Where a value of N/A or DNA has been recorded no value has been included when calculating the average value.
2. Answers to Question One were expected to be non-committal as members of staff were aware that this was not the final placement of the material and that work is needed to ensure that any material is available in a logical structure.
3. Operational Focus material and Forms scored highly on areas of benefit to branches and their staff and their ability to serve their customers.
4. The same could not be said of the Regulatory Compliance Material although these figures are skewed by the responses from Burnham. It was reported that the screen froze on a number of occasions when trying to complete the test and could therefore explain the low values. Conversely, both of the other branches rated training highly in terms of its potential use and impact on customer service.
5. Forms were seen as an opportunity to provide a communication route into other destinations (such as Sorting Offices, Head Offices and other Branches) and also to widen access to the reporting of faults and levels of performance. Performance reporting could apply to individuals, systems or functions across the network.
6. The Self-Help material was relatively well received but in their commentaries all branches stressed the need for it to be instantly available relative to the transaction being carried out. Also, any help material must be easy to access and return to the customer transaction and, in the case of transactions conducted infrequently, more detailed.

6.2 DIRECT FEEDBACK FROM BRANCH STAFF

In general discussion during the visits a number of key points were echoed by all when it came to potential improvements in the information and functionality that could be made available to them. These points are listed below. Where possible, they are related to the content or functionality of the device and the Horizon application. Wider issues are covered in Sections 7 and 8 (Observations and Conclusions).

1. Stock ordering process is unreliable, inaccurate and prone to error. A reliable and accurate electronic option is required that allows orders to be tracked and checked at any point during the process.

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2. Any improvement that eradicates the need for paper form handling should be encouraged. Some manual forms are being completed in significant numbers and were therefore questioned. Particular examples of these are those shown below (as previously stated in Section 5.3).
 - a. Passport Application Receipt & Notice – reference P4921 (Jan 2006)
 - b. Daily Schedule of Driver Licence Applications Received – DVLA reference D762
 - c. Daily Passport Schedule – reference P5035 (08/05)
 3. Staff in branches felt that some processes didn't appear to have been thought through to completion or had some glitches that either required manual intervention to complete or caused irritation due to additional process time and steps. Whilst not necessarily related to the delivery of the Intranet, examples of these anomalies are provided below.
 - a. When printing labels staff need to hand write "Small Packet" or "Printed Material" on the label before attaching to the parcel or envelope. It was asked whether this could be printed directly onto the label itself.
 - b. On completing remittances missing items are only reported once the entire remittance has been processed. Once notified of the omission staff members are required to resubmit all details anew. This posed the question as to why a notification of the missing items, and an ability to key them, could not be given before the final remittance calculation is processed.
 - c. Staff are unable to scan barcodes on stamp books.
 - d. Within the "Print Stamps" screen the "Print Stamps" and "Stamps" button were reported to be too close together resulting in errors and rework. A request was therefore made to investigate the possibility of moving these further apart.
 - e. When using National Savings Cards two options are presented, one above the other, and regularly used - "Cheque Deposit" and "Cash Deposit". Pressing the wrong one of these requires the clerk to exit the transaction and resume from the beginning adding considerable time. Again therefore a request was made to investigate the possibility of separating the two buttons on the screen.
 - f. Provision of a "Special Deliveries" button was also requested as currently their barcodes cannot be scanned. Consequently the entire transaction (weighing through to final processing) has to be completed when it is deemed unnecessary.
 4. Providing on-line content was greeted with mixed reaction as cases could be made for both electronic and hard-copy delivery mechanisms in often similar proportions. If the help material was quick and easy to use during transactions then moving to electronic formats was possible. However for large quantities of data, the only way to make this available to staff was often in the printed version in communal areas or during breaks in activity.
 5. With regards to terminal or computer-based training a similarly equal split between advantages and disadvantages. If designed to mirror the operational environment with an ability to suspend and resume from the same point to serve a customer, then it was a potentially viable option. The priority of serving customers remains and therefore any activity which limited activity at any one (or numerous) terminal was considered unworkable. Delivery of the same material via a standard PC posed both issues of availability of PCs and also the need to remove
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staff from counter positions. Clearly this carries similar implications to those mentioned previously.

6. Printing capability was causing numerous problems due to the quality of the output. Printed barcodes were of inadequate quality, especially in the busy offices. This necessitated rework and manual intervention.
7. Staff in branches also asked whether receipts could be personalised to either the branch or to promote other Post Office products such as travel insurance or foreign currency.

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7. OBSERVATIONS

A number of observations were made during visits that will affect, albeit to varying degrees, the types of changes that could be accomplished across the network.

7.1 LIMITED REAL ESTATE

A common issue with all branches visited, and by inference replicated across the network, was the availability of space to provide additional terminals or access points to additional content or intranet capability.

7.2 SUITABILITY OF HORIZON HARDWARE

As a point-of-sale interface the Horizon terminal is not an ideal vehicle for accessing material outside of the direct customer transaction or transaction support. The low resolution and touch-screen interface without standard mouse and keyboard functionality may impair the ability to navigate through intranet content. The ability to connect the Intranet to the terminal is also yet to be fully demonstrated. Whilst this is considered possible technically with work in progress to demonstrate this, the previous concerns remain.

7.3 ACCESS TO PCs

The availability of PCs from which to connect to the Post Office Intranet is limited. In the branches visited only the Crown Office (Reading) had a PC on site that could be used solely for Post Office purposes. Of the remaining offices, two had PCs in their shop / back office environment that could be used with permission and the other two had them available at home. Of these two, one was prepared to use it for Post Office purposes with their own Broadband connection whereas the other was not.

If it is concluded that the Horizon terminal is not suitable then alternative options to provide access will be required. It is noted that a previous business case was prepared and subsequently rejected for the provision of PCs across the network. It is also understood that there is no intention to revisit that business case at this time. Note, however, that the possibility of using existing PCs available or owned by Sub Postmasters or other branch staff remains. Although this would present a number of challenges, the idea has been voiced a number of times during the wider assessment workshops and interviews. It is an approach that is clearly favoured by a significant number of senior POL employees.

7.4 IMPACT UPON WORKING PRACTICES

Accessing new and additional content may have to be done outside of standard working hours or practices. The impact this could have on working regulations, shift patterns or branch dynamics has not formed part of this review but it should not be underestimated and requires further investigation.

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The focus on serving customers remains the dominant force in the branch and the absolute priority from all of those interviewed. Any change to the terminals or the material made available must not hinder this priority and the use of counter positions for non-customer facing tasks should be kept to a minimum.

7.5 RELIANCE ON OFFLINE CONTENT AND THE NBSC

Based on the observations above branches rely on paper and offline content being made available in communal areas to communicate operational changes to their staff. This poses a problem in branches with limited storage space as the numerous manuals take up valuable back office space or have to be stored off site.

Linked to the above there is a prevailing culture of calling the NBSC before seeking resolution of queries through the printed or available media. This is particularly true of irregular transactions and therefore represents a significant challenge to the provision of on-line support.

7.6 HORIZON AS AN ENABLER FOR WIDER CHANGE

From the work conducted during this trial there appears clear potential to utilise current technology to start introducing changes to the way in which content is published and distributed to the Branch network. Given that wider technology change such as full Intranet provision, may not be available in the short term, wider use of Horizon may begin to create a “critical mass” of change and deliver significant business benefit due to the lower cost base.

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8. CONCLUSIONS

8.1 LIMITATIONS OF TECHNOLOGY AND EXPANSION REQUIREMENTS TO BE FURTHER INVESTIGATED

Providing the Intranet to the branches appears to offer as many challenges as opportunities. The business need for opening up this capability is as yet unclear, and with the potential advantages being counter-balanced by the limitations of the current operational environment, future development opportunities are complex.

Introducing new uses for existing system functionality presents a number of possibilities for the exploitation of the technology currently available. It will be important to gauge the views and opinions of the branch network (initially addressed during the wider assessment) to develop relevant content. It will also be important to understand the impact on existing processes and the teams in place to deliver them.

8.2 AUTOMATION AND CURRENT OPERATIONAL DIFFICULTIES SHOULD BE PRIORITY

In discussion with the participant branches there are a number of issues that are at the forefront of their minds – namely stock ordering and printer capability. Means of providing a stock ordering capability via the Horizon terminal are being investigated and will have a considerably positive impact on the branches. Other operational issues, such as printer capability, are also clouding judgements on potential new developments. Once updated counter printers have been rolled out (forecast for early 2007) it may be that other opportunities could be pursued. At the moment however these operational issues are influencing their opinions.

8.3 INTRANET CAPABILITY REPRESENTS MAJOR STEP CHANGE

It should also be noted that it is difficult for branch staff to understand what could be delivered via the provision of the Intranet. It requires a level of vision in a context that is unfamiliar to them. Consequently, they may express views at this stage that might not be upheld following delivery of a live environment.

8.4 ACCESS REMAINS THE ISSUE

Although able to access all terminals in all branches the validity of using the point-of-sale terminal to display the Intranet is widely questioned and yet to be proved. Should this prove an invalid means of displaying the Intranet then potential alternatives need to be established that do not compromise the issue of limited real estate yet provide a standard access method for all branches.

The conclusion that arises from the findings is that there is no single approach to delivering the Intranet that can be guaranteed to be successful across the entire branch network. This contradicts the original guiding principal for the trial that all branches must be treated equally.

8.5 MAXIMISE CURRENT SYSTEM USE FOR EXISTING HARD COPY MATERIAL

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Following on from this, some very simple changes to processes, system functionality and distributed media could actually have more impact than opening up an entirely new capability. Indeed one of the branches stated that provision of simple help and reference material (Christmas Arrangements) was more favourably received than the idea of being able to browse the Intranet.

8.6 ADDITIONAL HORIZON CONTENT TO BRING SHORT-TERM BENEFIT

The trial demonstrated that the branch network was receptive to change and development. It also proved that additional and useful content could be made available in the short term in a cost-effective way that could open up the Head Office network to the wider branch community. Provided that some of the operational issues referenced in this document are resolved, and some short-term improvements to the current interface and system are made, this should have a positive impact on the culture and mindset of the entire network. This could therefore lay a solid foundation for any developments and changes that the Horizon On-Line environment may bring as requirements are defined and confirmed.

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9. RECOMMENDATIONS

Based on the findings above the following recommendations are made.

1. Implement on-line stock ordering as a matter of urgency to provide confidence and reliability in the supply chain. Examples of incorrect, incomplete and duplicated orders represent significant opportunities to reduce costs and improve business efficiency⁶.
2. Identify clear business requirements for intranet expansion to cover the entire branch network in order that solutions can be designed to meet true business needs.
3. Identify the capability and feasibility of connecting the Post Office Intranet to the Horizon terminal. Work to establish the technical feasibility is in progress but it should be extended to cover the suitability of the current hardware to meet future functionality requirements.
4. Investigate access options to connect the branch network to the Intranet. If the Horizon device is not considered suitable then wider access options must be considered.
5. Identify further process automation options to maximise the current Horizon system functionality and remove existing manual operations.
6. Confirm the possibility of, and requirements for, the provision of Operations publications through the Horizon terminal and initiate a project to deliver them.
7. Assess the impact on current processes, procedures and teams to render content in a format that is suitable to being published electronically via different channels.
8. Investigate production of product related training material that could be made available via Horizon utilising both the AP/ADC and APOP functionality.
9. Investigate further options to provide self help material and reduce the number of calls made to the Horizon Service desk.
10. Instigate work to ascertain the range and severity of the anomalies reported by the branches within current Horizon transactions to ascertain potential improvements. This may lead to some enhancements and improvements or may highlight those that are already planned or in progress.
11. Improve printing capability and identify potential ways to enhance the details printed or displayed on receipts and labels⁷.

These recommendations will be referenced in the *Intranet Exploitation Assessment* document (Reference *IEA02*) to be published as part of the Intranet Exploitation Assessment exercise. Please note however that recommendations 10 and 11 above (with the exception of the potential for on-demand printing within recommendation 11) relate specifically to the current Horizon implementation. Consequently these are not considered to impact future exploitation of the Post Office Intranet and will not be reflected in *IEA02*.

⁶ Automated Stock Ordering project has produced a Feasibility Report which is currently being reviewed.

⁷ A project to replace counter printers is due to commence early in 2007.

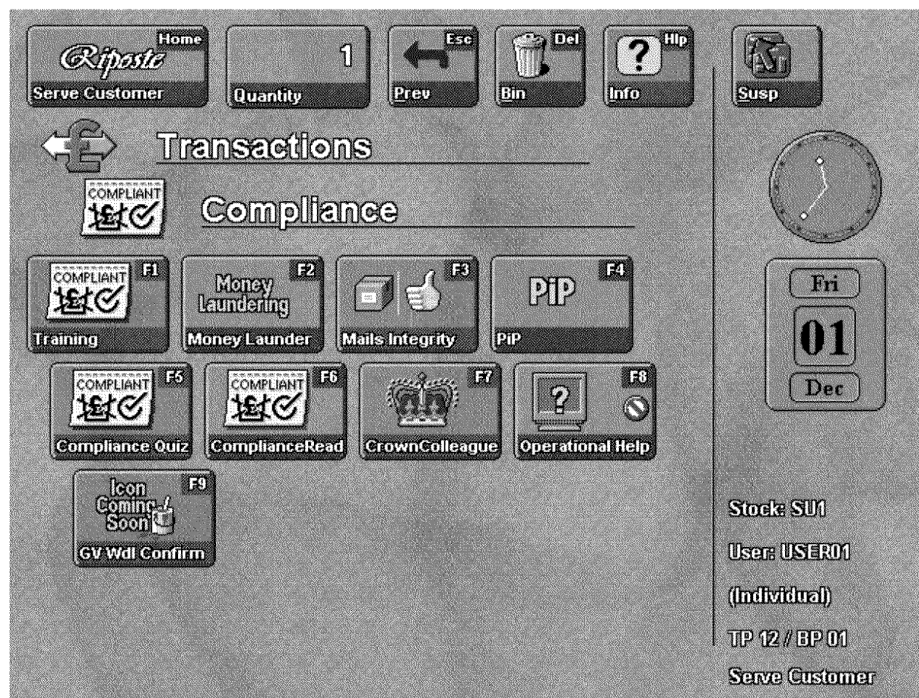
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10. APPENDICES

APPENDIX I – TRIAL CONTENT

The menu below was created to launch the Trial Material. Trial content was available from buttons F5 through to F8 inclusive.



Having entered their user details individuals were presented with each of the "Compliance Quiz" questions as below.

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The screenshot shows the Riposte software interface. At the top, there is a 'Home' button with the Riposte logo and a 'Serve Customer' button. To the right are four navigation buttons: 'Prev' (with a left arrow), 'Bin' (with a trash can icon), 'Info' (with a question mark icon), and 'Susp' (with a suspension icon). Below these, the interface is split into two main panels. The left panel, titled 'Q1', contains the text: 'If a customer asks if they should opt for fully comprehensive car insurance cover would you recommend that for greater protection they do?'. At the bottom of this panel is a large button with a checkmark icon and the text 'OK'. The right panel, titled 'Comp Qs', contains the text: 'Intranet Trial 9826935100353'. Below this, there are two checked items: 'ROLE: Crown Office Colleague' and 'CONTINUE'. At the bottom of the right panel, there is a label 'Q1:' followed by a small empty box.

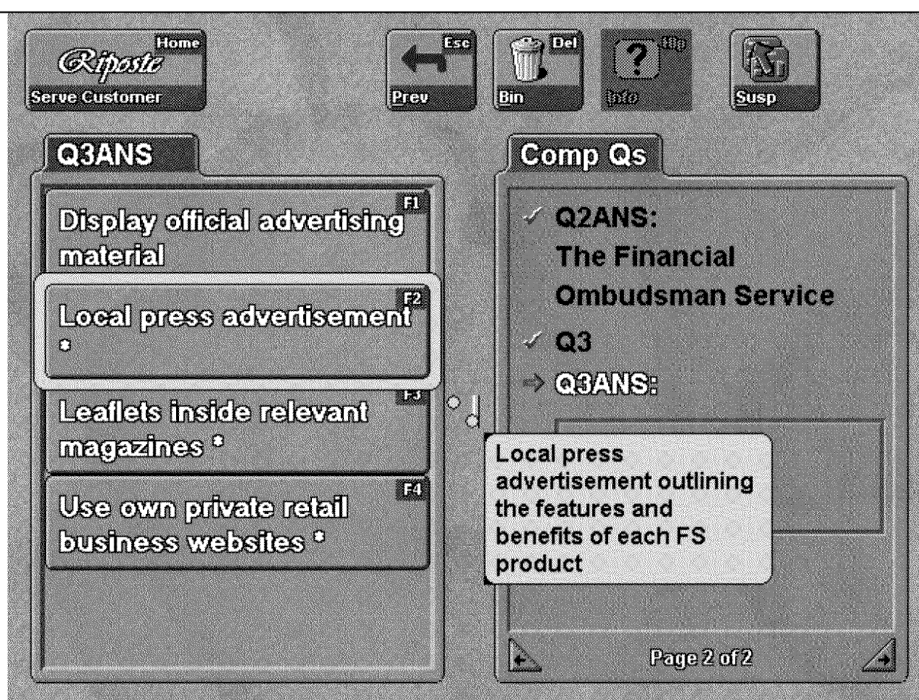
Multiple Choice answers were then presented as shown below. Asterisks were used to notify individuals that the answer had been truncated in order to fit on the button.

The screenshot shows the Riposte software interface with multiple choice answers for question Q1. The top navigation bar is identical to the previous screenshot. The left panel, titled 'Q1ANS', contains four buttons, each with a truncated answer and a function key label: 'Yes - all should be fully covered *' (F1), 'No - third party only as it's cheaper *' (F2), 'Not before calculating price *' (F3), and 'Advise to contact Helpline *' (F4). The right panel, titled 'Comp Qs', contains the text: 'Intranet Trial 9826935100353'. Below this, there are three checked items: 'ROLE: Crown Office Colleague', 'CONTINUE', and 'Q1'. At the bottom of the right panel, there is a label 'Q1ANS:' followed by a large empty rectangular box.

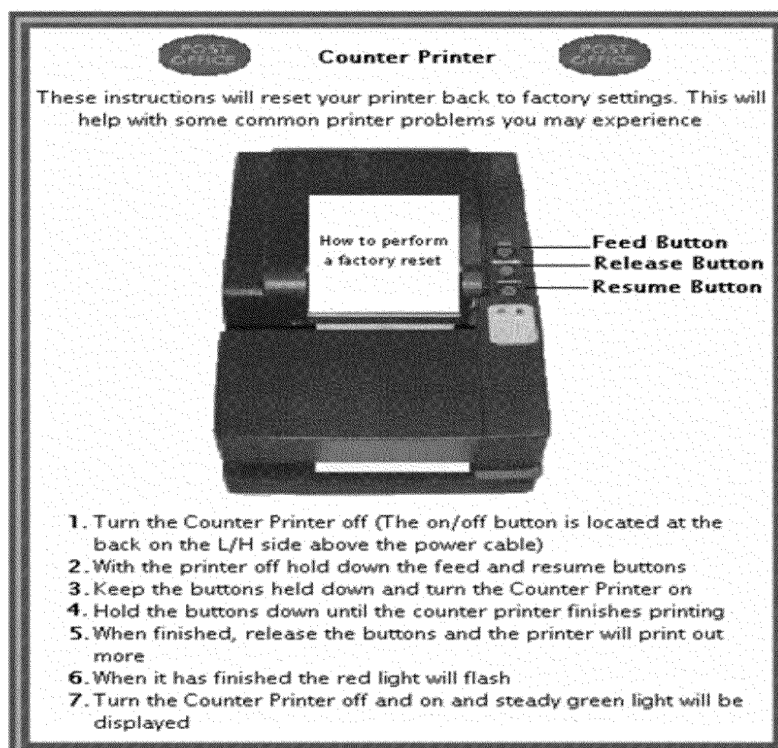
Using the "Info" facility, bubble help was used to provide the complete answer as it appears in the Regulatory Compliance Booklet.

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Within the Operational Help Menu the Printer reset Instructions were provided in the format shown below.



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Operations Manual Interim and Operational Focus *plus* Reference Material was presented in the standard Smart Help format and navigated in the same way. The contents page for the Operations Manual Euro Checking Instructions is shown below.



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APPENDIX II – BRANCH TRIAL FEEDBACK FORM

The form below was supplied to all branches to complete in readiness for the final visit at the end of the trial.

Horizon – Additional Content Proof of Concept						
Branch Trial Feedback Form - <Branch Name>						
Please complete the sections below relating to the trial elements that have recently been made available to you as part of the exercise.						
1. Operational Focus Reference Material						
	Strongly Disagree			Strongly Agree		
• This material was easy to access	1	2	3	4	5	N/a
• This material was easy to use	1	2	3	4	5	N/a
• This material (or similar material) would benefit you and your staff?	1	2	3	4	5	N/a
• This material (or similar material) would enhance your ability to serve your customers	1	2	3	4	5	N/a
• The Horizon terminal is an appropriate vehicle to display this (or similar) material	1	2	3	4	5	N/a
Please use the box below to provide any further comments on the Operational Focus material						
2. Compliance Test						
	Strongly Disagree			Strongly Agree		
• This test was easy to access	1	2	3	4	5	N/a
• This test was easy to use	1	2	3	4	5	N/a
• This material (or similar material) would benefit you and your staff?	1	2	3	4	5	N/a
• This material (or similar material) would enhance your ability to serve your customers	1	2	3	4	5	N/a
• The Horizon terminal is an appropriate vehicle to display this (or similar) material	1	2	3	4	5	N/a
Please use the box below to provide any further comments on the Compliance Test.						

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3. Crown Your Colleague Form

	Strongly Disagree			Strongly Agree		
• This form was easy to access	1	2	3	4	5	N/a
• This form was easy to use	1	2	3	4	5	N/a
• This form (or forms in general) would benefit you and your staff?	1	2	3	4	5	N/a
• This form (or forms in general) would enhance your ability to serve your customers	1	2	3	4	5	N/a
• The Horizon terminal is an appropriate vehicle to display forms in this way	1	2	3	4	5	N/a

Please use the box below to provide any further comments on the Crown your Colleague form

4. Printer Reset Help Material

	Strongly Disagree			Strongly Agree		
• This help material was easy to access	1	2	3	4	5	N/a
• This help material was easy to use	1	2	3	4	5	N/a
• This help material (or similar help material) would benefit you and your staff?	1	2	3	4	5	N/a
• This help material (or similar help material) would enhance your ability to serve your customers	1	2	3	4	5	N/a
• The Horizon terminal is an appropriate vehicle to display this (or similar) help material	1	2	3	4	5	N/a

Please use the box below to provide any further comments on the Printer Reset help material

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5. Wider Feedback

Please use the box below to notify us of any additional functionality or reference material that you would like to be made available to you and your staff either via the Horizon terminal or by some other means.

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APPENDIX III – OPERATIONS MANUAL INTERIM PRODUCTION CYCLE

The table below shows the current production cycle for the Operations Manual Interim publication.

Operational Publications Production and Distribution Timescales Operations Manual Interim		
Week 1	Wed 09:00	<ul style="list-style-type: none"> Deadline for submission (unlike an article in Operational Focus, OM+/OF+ must be pre-booked by the contributor)
Week 1	Wednesday Thursday Friday	<ul style="list-style-type: none"> Convert submission (incorporate text and graphics) in appropriate software for typesetting using OM+/OF+ templates Complete initial edit (text is re-written, restructured, operational gaps filled, issues resolved) Produce version 1 in PDF Send version 1 PDF to review group Check and collate reviewer's comments Produce version 2 PDF Submit version 2 PDF to contributor for final sign-off by Wednesday/Thursday, depending on complexity
Week 2	Monday Tuesday Wednesday	
Week 2	Thursday	<ul style="list-style-type: none"> Check and incorporate (if applicable) contributors' sign off amendments Finalise page layout Produce and check table of contents Complete proof read Complete print order Notify printers (Romec Print, Swindon) of number of pages, quality of paper etc
Week 2	Friday	<ul style="list-style-type: none"> Send the document to Romec Print via ISDN
		<ul style="list-style-type: none"> Publish OMI on intranet and Operational Publications PDF site
Week 2	Monday	<ul style="list-style-type: none"> Romec Print start print run
Week 2	Friday	<ul style="list-style-type: none"> Romec print complete print run
Week 3	Monday	<ul style="list-style-type: none"> Romec Print despatch in bulk to Optecon in Leicester (with the Operational Focus for the same week) to arrive by 12 noon
Week 3	Tuesday	<ul style="list-style-type: none"> Optecon despatch the Operational pouch containing the OMI, Operational Focus and other operational material via 1st class mail.
Week 3	Wednesday	<ul style="list-style-type: none"> Vast majority of Operational pouches arrive in branches
Week 3	Thursday	<ul style="list-style-type: none"> Distribution complete

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