

ICL Pathway Pathway Programme Monthly ReportRef: PA/TEM/0011
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1 MONTHLY SUMMARY

1.1 GENERAL

- Replan activities being finalised now allows us to make progress again, especially in relation to detailed costings and plans for the advertising and PR work.
- Although training is 'wrapped up' in the replan commercial proposal, we continue with Peritas and POCL to look at ways of ameliorating the additional cost of the extended training.
- Migration continues to be another irritating hang-out. I believe there is a way forward and a meeting on 7/3 will progress this.
- Business Development initiatives continue. Magistrates Courts has been identified by the ICL account team as a potential revenue earner across the Post Office counter.
- Management of Change continues to progress. Good work with the POCL management of change programme. Also significant input into training, user awareness and evaluation.
- Management Awareness events have received very good feedback and have been a success.

1.2 MARKETING COMMUNICATIONS

1.2.1 Customer Education

- ICL Pathway's recommendations for customer education were submitted on 15 January. Feedback was received, albeit partial. The activity of submitting the recommendations revealed the extent of the PDA disagreement with our customer education planning (and therefore costing) assumptions.
- A contractual meeting to discuss the variances is scheduled for 6.3.97.
- Until this meeting is held all of the PDA team are refusing to meet and plan communication. However, now that the next stage of the implementation is clarified, some progress will be made with the PDA in terms of setting real deadlines by which information is needed. The real challenge is to get the PDA to agree any timeplans and to identify how the various sub-groups add value to the CWG or CSC. I have raised this issue with Mena Rego and am arranging a meeting with her to discuss. The real challenge is to influence the BA side.
- We will now proceed with detailed costings for the communication programme for the rest of 1997 now that re-plan is bedding down and the specifics of the 2,200 offices are known. We are also costing the impact of CAPs delays. We will also cost the extension of the McE & FD contract.

1.2.2 Special Interest Groups

- Plan completed covering all key deliverables and production schedules. Chrissie is trying to get PDA agreement.

1.2.3 Press Planning

- Most key deliverables have been drafted: no PDA agreement as yet.
- No further progress on their acceptance of our crisis communication plan and how they relate to our processes.
- We intend to up the ICL Pathway profile independently of the PDA: We will be targeting the business, quality and trade press. Target start date is June.

1.2.4 Internal Comms

- As our involvement here is less clear (contractually) than elsewhere, progress is less certain. However, Andrea has met with all key contacts to start a systematic approach and has been invited on to their sub-group on BA comms.
- All sponsor publications are now received and have been analysed in terms of audience, frequency and copy deadline. As a result, a list of stories, (with relevant timings and the magazine for which they are suitable) which convey our key messages, has been drawn up: we hope to get the PDA to accept these as “a good idea” for which they can claim credit!
- The matter of how BA & POCL intend to communicate the procedural changes of the Card is quite complex: PDA Comms are barring our involvement, but as this is a training issue we are talking to training from the perspective of how sponsor training can be supported by internal comms.
- Starting to talk to sponsors etc about Internet profile.
- Am still awaiting feedback on the involvement of the Sub-fed.

1.3 BUSINESS DEVELOPMENT

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- First Client Launch Day in Marketing Suite - revised agenda which works well, and has tangible outputs and deliverables.
- Top team approval of Strategic Partnership document. In addition, a number of useful discussions and follow-up meetings came out of Hedsor session.
- Selection of Business Development Manager progressing.
- Progress on Mails (although slow and painful - we now understand reasons for delay and are addressing), smartkey, bee-keeping, and scorecard mappings.

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- EFTPOS requirement progressing. ITT for merchant acquirer issued by POCL. We are costing the development impact.
- Household budgetting has surfaced pushed by the Water Services Association and by BA who are keen to get rid of their Direct Deduction free service.

1.4 MANAGEMENT OF CHANGE

- The Management Awareness programme is nearly complete . By the end of February, 17 events out of a planned 18, in this phase, will have been completed. The events are undergoing continuous improvement and all have been very well received. Following Stuart Sweetman's statement at the PSC that he " now owns the events" I have agreed with Mena Rego and Bruce McNiven that we will issue an invoice to Bruce who will handle it.
- We have been asked to run a Management Awareness event in Chesterfield. We are discussing terms and conscious that this will be a difficult audience.
- The Management of Change Strategy has been accepted by Lesley Lawson and Chris Robinson (French Thornton) as the Horizon part of the overall POCL Change Management Strategy (which is not yet documented). It is a document that itself will undergo change but will satisfy the action received at the Partnership Workshop for a jointly agreed Management Of Change Strategy.
- Dave Smith will take over Ian Gibbard's old position under the title of Head of Automation Transformation from April 97.
- French Thornton's findings include the fact that Retail Network Managers currently have planned demands on their time equalling 140% of actual time available. They are therefore reviewing with Stuart Sweetman the RNM's role.
- A lot of work has been done on the User Awareness events, and following the dry-run with PDA I am quietly confident that they will be successful. Ongoing work will undoubtedly be needed.
- Due to work on Help Desk rationalisation, a large opportunity with Help desk provision has been discovered with Post Office group perhaps totalling 30 million calls per annum. Steve Muchow is the key contact.
- The concept of Regional User Satisfaction managers has been discussed with all the RLMS. As a consequence 2 mini-projects have started:

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- Greg Couper is working on Information Flow with the RLM for North-East. The objective is to understand what information the POCL regions eg the Regional General Managers, Liaison Managers and Retail Network Managers will require to play their part in the project effectively.
- Jacqui Haxton is working on Red/Amber/Green with the RLM for the South West. The objective is to develop a process which identifies those Post Offices that will need extra help to ensure they are successful (Amber). Red offices will include serious contractual issues that can only be resolved by POCL and Green offices are those which should pass smoothly through the Implementation Process without needing any further attention. Jacqui will also document the regional structure and responsibilities as well as working closely with an RNM working group for Live Trial.
- A meeting has been organised between Bruce McNiven and Dave McLaughlin from PDA and Steve Muchow, Peter Burden, Dave Fletcher, Dave Groom and Steve Cowburn to discuss Evaluation and User Satisfaction. The objective is to define our joint approach and understand roles and responsibilities.
- An Horizon demonstration video has been agreed verbally with Bruce McNiven (written confirmation in hand). This will be used by RLMs and RNMs to illustrate system capability. £15K has been agreed as an outline figure pending firm quotations.

1.5 CLIENT MANAGEMENT

- The main event requiring the Pathway exhibition stand was the POCL Regional event on Sunday 23/2. This was extremely well received and “over-the-top” thank-yous have been received from Fiona Anderson (RLM).
- A further meeting with Microsoft was held where the Riposte system was explained to Richard Wilderspin. He is going to visit FEL01 (14:30 9/4) for a demonstration of the system.

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- Cards: War Pensions variants remain outstanding although the consultants were appointed in Nov 96. Tangible designs for DLR to work on were promised for the end of the month but, in the event, they are now promised for 14/3. Given that DLRCT receive the designs on 14/3 then approval should be completed by the end of June (23/6 current target).

NFSP

- Colin Baker has agreed to pay the outstanding invoice of £2.5K in early April. Sorbus are currently bidding for their h/w & s/w support contracts. However, they (Sorbus) may decline the s/w unless they can avoid some old applications which are still running.

FUTURE EVENTS

- Preparation is complete for the ICL Showcase (3 day) event at the Radisson Hotel 10-12/3.
- Plans are underway for the Paul Rich et al briefing on 25/3 by ICL Retail.

CARDS & TOKENS

- Activities on the War pensions will continue for some months. However, activities on the temporary tokens (secure paper/hologrammed....) and the postmasters' smart cards will ramp up during the coming months.
- Develop BA contacts. Martin Johnston is initially visiting Bev D'Alessio & John Down 7/3 to see how we might progress this and a general interchange of views.

- **STOP PRESS**

Pat Kelsey has agreed to pay £7.2K towards the card redesign work of last September. A major achievement in that this is additional to any contractual obligations and an admission that they have been a contributor to re-work on our part.

2 PROGRESS

2.1 LEVEL 1 MANAGEMENT OR HANDSHAKE EVENTS DUE FOR COMPLETION DURING FEBRUARY 1997

WBS No.	Description	Previous Complet'n Date	Current Complet'n Date	Progress Status
5.2.2.3	Dry Run User Awareness programme - BA	28-Feb-97	28-Feb-97	Complete

2.2 LEVEL 1 MANAGEMENT OR HANDSHAKE EVENTS DUE TO COMPLETE DURING MARCH 1997

5.2.2	TRAINING - DEVELOPMENT	28-Mar-97
5.2.2.4	Dry Run ""Train the Trainers"" Course - BA	04-Mar-97
5.2.2.5	Sign Off User Awareness programme - BA	07-Mar-97
5.2.2.6	Sign Off ""Train the Trainers"" Course - BA	12-Mar-97
5.2.2.7	Courseware Masters Available (TTT)	27-Mar-97
5.2.2.11	Dry Run User training courses - POCL	21-Mar-97
5.2.2.14	Sign Off User training courses - POCL	27-Mar-97
5.2.2.15	Sign Off User Awareness Programme - POCL	24-Mar-97

3 CURRENT CRITICAL PROBLEMS

None

4 ISSUES

- Migration and “going live” are still a key area of concern. A letter from Bruce McNiven clearly states the PDAs understanding of the contract that migration is a Pathway responsibility. This could have serious resourcing and cost implications. Strategy now adopted and meeting taking place Friday 7th to discuss.
- Delivering user satisfaction is a responsibility that is not clearly understood. The implementation teams are not focusing primarily on it, whereas the service teams

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are expecting it. It is imperative for both teams and ICL Pathway in general that User Satisfaction is actively managed and delivered. Funding will be an issue.

- Political/sensitive nature of all client re-engineering is becoming clear; presentations to DNS Union Reps, presentation to Chesterfield. Needs careful management and will require increasing support from MarComs (PR management) which is not in current MarComs resource/budget plans. This represents the most likely route for project leaks if we do not work closely with clients PR areas.
- Re-plan activities have been leaked by Girobank the supplier to Girobank the client. We need to plug this leak for MarComs (PR management), BusDev (Involvement on Bee-keeping as a partner), and credibility reasons. Richard Banks is raising re-plan impact at his meeting with Stuart Sweetman on 19/3, and if Stuart Sweetman deduces that there is an ICL Pathway leak he (or Paul Rich) is likely to discuss/write to JHB, who accordingly needs to be briefed. That said, we need to plug this leak sensitively, otherwise Girobank the client will stop telling us what they have heard from Girobank the supplier.

5 COSTS

Business Development continues to operate within budget taking into account the deferred expenditure due to the re-plan.

I have also undertaken a full review of the '97 budget with Finance and Programmes group to ensure accuracy with the overall plan. This has not uncovered any major discrepancies.