

**ICL Pathway      Management Care Visit Programme  
   Procedure**

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Ref: CS/PRO/033  
Version: 0.2  
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## **0    DOCUMENT CONTROL**

### **0.1    DOCUMENT HISTORY**

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0.1	30/07/97	First draft for internal Pathway review

### **0.2    ASSOCIATED DOCUMENTS**

<b>Reference</b>	<b>Vers</b>	<b>Date</b>	<b>Title</b>	<b>Source</b>
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### **0.3    ABBREVIATIONS**

MCVP - Management Care Visit Programme.

POCL - Post Office Counters Limited

RLM - Regional Liaison Manager

### **0.4    CHANGES IN THIS VERSION**

None

**ICL Pathway      Management Care Visit Programme  
Procedure**

Ref: CS/PRO/033  
Version: 0.2  
Date: 07/08/97

---

## **0.6 TABLE OF CONTENT**

<b>1 PURPOSE.....</b>	<b>4</b>
<b>2 INTRODUCTION.....</b>	<b>4</b>
<b>3 TRAINING.....</b>	<b>4</b>
<b>4 PREPARATIONS AND DOCUMENTATION.....</b>	<b>5</b>
<b>5 ARRANGING APPOINTMENTS.....</b>	<b>5</b>
<b>6 THE INTERVIEW.....</b>	<b>6</b>
<b>7 FOLLOW UP LETTERS.....</b>	<b>9</b>
<b>8 FEEDBACK REPORTS.....</b>	<b>9</b>
<b>9 ANALYSIS.....</b>	<b>9</b>
<b>10 INTERVIEWER'S SUMMARY GUIDE.....</b>	<b>11</b>

**ICL Pathway      Management Care Visit Programme  
Procedure**Ref: CS/PRO/033  
Version: 0.2  
Date: 07/08/97

---

## **1      PURPOSE**

The purpose of the MCVP is to monitor the user's perception of ICL Pathway's Post Implementation Customer Service. The interviews will allow ICL Pathway to gain an understanding of the user's (Postmasters) problems, concerns, suggestions and good news. Where and when relevant ICL Pathway can act upon this information as an aid to resolving problems, taking pre-emptive action and learning from good news and positive feedback.

This programme is non contractual, and will be managed within the Customer Service department of ICL Pathway.

## **2      INTRODUCTION**

The MCVP will be carried out annually, visiting around 500 Post Offices per year after full roll out of the programme (1999 onwards). Until that time a small number of Post Offices will be visited in Q4 of 1997 and around 200 in 1998. Cumulative analysis will be carried out internally on a monthly basis, and results published quarterly.

A number of relevant senior ICL Pathway representatives will be selected to carry out the interviews (hereafter known as the interviewers).

## **3      TRAINING**

The Customer Satisfaction Manager will present the details of the procedure to the interviewers before they have contact with any Post Offices regarding the interviews.

The purpose and the goals of the MCVP will be presented. The interview procedure and questionnaire will be explained in detail and the interview process will be established. All other relevant documentation will be presented, and any questions or concerns raised by the interviewers will be addressed.

Section 9 of this document is the Interviewer's Summary Guide, which is designed to be extracted and used as a reference guide during the interviews.

It is important for the interviewers to understand why each interview must

follow a standard procedure, to ensure all results can be fairly compared and a true analysis obtained.

## **4 PREPARATIONS AND DOCUMENTATION**

The interviewers will be sent, electronically, copies of relevant documentation, plus hard copy 'Interview Packs' which should be maintained by the interviewers, containing all relevant reference documentation. These packs must be taken to the interviews.

The Interview Packs will contain the Procedure document (including Interviewer's Summary Guide), Phone Script, sample forms and documents (referred to in the questionnaire), the Questionnaire and the list of Post Offices to be contacted.

Before contacting the Post Offices, the interviewers must familiarise themselves with recent Horizon System Helpdesk call history. The call history should be assessed to check there is no reason why the Post Offices should not be contacted at this point in time to arrange a visit. The decision not to visit a particular post office will be made by the Customer Satisfaction Manager (or nominated representative).

For 1997 only the POCL RLM's will be supplied with the list of potential Post Offices, before they are formally chosen. Any Post Offices which they feel need excluding from the list will be discussed with the Customer Satisfaction Manager, and any agreed amendments to the list of Post Offices will be made accordingly.

## **5 ARRANGING APPOINTMENTS**

Once the list of Post Offices has been received by each interviewer, he or she can start to arrange the visits, after first requesting and having the Horizon System call history checked by the Customer Satisfaction Manager.

Details of the Post Offices, FAD Code, Address, Phone Number and Contact Name will be supplied to the interviewers. Each list will be personalised for each interviewer, only containing the Post Offices to be visited by that interviewer.

The interviewers should first familiarise themselves with the Phone Script (Ref: MCV 97/script.doc) and then telephone the Post Offices, using the script, to arrange the appointments.

**ICL Pathway      Management Care Visit Programme  
Procedure**Ref: CS/PRO/033  
Version: 0.2  
Date: 07/08/97

---

As each visit is arranged details of the Post Office and appointment must be sent to the Customer Satisfaction Manager for entry onto an Appointments Database.

The interviewers must ensure the Post Offices have a contact number and the interviewer's name so that they can contact the interviewers should a problem arise with the arranged appointment. If an interviewer is difficult to get hold of in general then they should leave the contact number for the Customer Satisfaction Manager as an alternative.

The interviews should always be arranged at a time to suit the Post Office. This may involve a lunch time, or in some cases an evening meeting. The interviewers should also stress that the interviews need take no more than half an hour, but that there is no time limit applied.

If the interviews are arranged significantly in advance (more than 10 days) the interviewer should contact the Post Office nearer the visit (no more than 2 days before) to confirm it can still go ahead.

It is up to the interviewers to obtain directions to the Post Offices.

## **6 THE INTERVIEW**

Before going to the Post Offices the interviewers must familiarise themselves with the questionnaire.

The questionnaire has eleven sections. Before commencing with Section 1 onwards the interviewers should explain a little more about the purpose and objectives of the visit, as stated in the notes on the front sheet of the questionnaire.

### **Section 1**

This section can be pre-filled, where possible, before the interviews, to save time. However, all information must be checked with the interviewees before moving on to the next section.

## Section 2

The interviewers should gain a very brief understanding of how the implementation of the Post Office went in general. This will not form part of the statistics, but it will help ICL Pathway understand if any implementation experiences have influenced the subsequent views of the interviewees, either positively or negatively.

## Sections 3 to 10

All the answers to the questions in these sections will be analysed. There is an 'N/A' (Not Applicable) option for each question, but it should be avoided if at all possible. When asking each question the interviewers should read out the positive and negative answer options, and only then offer 'N/A' if it appears unavoidable.

Where 'N/A's are recorded the number of Post Offices we can analyse against that question is reduced, thus giving a smaller sample of Post Offices' views.

The interviewers must mark the boxes appropriate to the answers given. The interviewers must not suggest answers or influence answers in any way, other than to try to avoid 'N/A' answers where possible, but must ensure the interviewees understand the questions fully before they answer.

There is an opportunity for the interviewees to comment further on the response given to each question. The interviewers should ask if there are any comments after each question is answered.

It is especially important to get comments when the questions have a negative answer, in order to help ICL Pathway understand the reasons behind the negative comments, and thus enable them to take any possible corrective action, either generically or for a single Post Office, if relevant.

**Section 6 - Payment Card Helpline, IS NOT APPLICABLE TO OBCS (1B) Post Offices, and is therefore not applicable for the 1997 interviews. This section should either be removed or skipped over during the interviews.**

## Section 11

**ICL Pathway      Management Care Visit Programme  
Procedure**Ref: CS/PRO/033  
Version: 0.2  
Date: 07/08/97

---

This section gives the interviewees a chance to express any concerns, problems or suggestions for improvement to the Horizon system or services. The interviewers should also encourage any positive comments or experiences the interviewees can share. This will help to keep this section balanced.

At this point the interviewers should try to engage general conversation in order to get opinions free flowing and less 'closed' than those given during the questionnaire, but remembering to keep the conversation relevant to the purpose of the interviews (i.e. about the services provided after implementation).

Questions such as:

*'What else would you want ICL Pathway to do to improve services?*

*What sort of things do we do well and what sort of things do we need to improve on?'*

If the interviewees ask any questions, the interviewers should note them down and explain that they are not in a position to answer any specific questions as part of the interview process. If required an ICL Pathway representative could contact the interviewees at a later time to respond to any specific questions. These questions should be noted down in Section 11 or in the additional notes area.

At the end of Section 11 the interviewers must ask whether the interviewees are willing to be contacted again, if necessary, after the interview results are analysed. The interviewers must delete either the 'willing' or 'unwilling' part of the statement accordingly.

The interviews can then be terminated. The interviewers should remember to thank the interviewees for their time and co-operation, and then leave the premises.

## **7 FOLLOW UP LETTERS**

As soon after the visit as possible the interviewers should write to the interviewees confirming the main points of the interview, to ensure there is no future controversy or misunderstanding about the information provided by the interviewees.



**ICL Pathway      Management Care Visit Programme  
Procedure**Ref: CS/PRO/033  
Version: 0.2  
Date: 07/08/97

---

The first and last paragraphs of the letter will be supplied as a standard. The middle section of the letter will be the summary of the interview (as compiled by the interviewers). This does not need to include details about sections 3 to 10 of the questionnaire, but should cover the information provided for sections 1, 11 and any additional notes made.

## **8      FEEDBACK REPORTS**

The completed questionnaires and reports must be treated as confidential within ICL Pathway. They must be kept securely until they can be passed on to the Customer Satisfaction Manager, as quickly as possible.

The results of the questionnaires are entered on to an analysis spreadsheet (see document reference MCVP 97/analysis97.xls). The FAD code is used as the unique reference for each completed questionnaire. The hard copies will be filed securely in numerical order by FAD code. Any questions, concerns or required actions logged will be recorded against the FAD code.

## **9      ANALYSIS**

Pre-designed graphs will reflect Positive, Very Positive, Negative, Very Negative results for each section, from 3 to 10.

A report will be produced monthly showing graphs with the cumulative results to date and a brief summary on each section's results. Relevant information from Section 11, and any additional notes, will also be summarised. This report will be for limited distribution within ICL Pathway.

A quarterly report will be produced, similar to the monthly reports, which will reflect the cumulative, quarterly results. There will also be further recommendations for action on feedback of note.

Results will be formally published internally each quarter. The most appropriate method of publication to be decided at the relevant time.

The quarterly report will be presented to the PDA via the Satisfaction Forum.

General publication to all Post Offices is expected to be a brief write up, using the most appropriate method of publication, which will be decided at the relevant time.

**ICL Pathway      Management Care Visit Programme  
Procedure**

Ref: CS/PRO/033  
Version: 0.2  
Date: 07/08/97

---

Concerns, suggestions or comments which require further action will be recorded separately on the spreadsheet as a log for action. The FAD code, name of the Post Office, and details of the comments will be noted, and any actions taken can be recorded. The record will be kept open until a satisfactory conclusion is reached. The action can then be marked as closed. The Customer Satisfaction Manager will maintain and manage the log.

The Post Offices will only be contacted to follow up any feedback if they agreed at the interview to further contact, and only then when considered necessary by ICL Pathway.

## 10 INTERVIEWER'S SUMMARY GUIDE

### Preparation

If there are any outstanding questions or concerns regarding the visits or the procedure, contact the Customer Satisfaction Manager **before** contacting any Post Offices.

You should have received electronically the Phone Script (ref: MCVP 97/script.doc), Questionnaire (ref: MCVP 97/Quest&Report.doc), standard follow up letter (ref: MCVP 97/letter.doc) and MCVP Procedure document (ref: CS/PRO/033). A new questionnaire should be printed for each Post Office visit (always have a spare questionnaire in your Interviewer's Pack just in case).

You will have received an 'Interviewer's Pack'. This should contain:

Phone Script, Questionnaire, Sample documents, Interviewer's Summary Guide, Post Office list.

### Arranging Appointments

First check the Horizon System call history (to be supplied by the Customer Satisfaction Manager on request). Contact only the Post Offices on your list. Arrange a time to visit using the phone script. Make sure you cover all the information on the phone script.

Get directions to the Post Office.

Feed back immediately all appointments made to Customer Satisfaction Manager, giving:

FAD Code, PO Name, PO Contact, Phone Number, Date, Time.

If any appointment details change, notify Customer Satisfaction Manager asap.

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### The Interviews

**ICL Pathway      Management Care Visit Programme  
Procedure**Ref: CS/PRO/033  
Version: 0.2  
Date: 07/08/97

---

Section 1 can be completed before the interviews, where possible. You must check this information with the interviewees before moving on to Section 2. Make sure your handwriting is always legible.

Just get any points of note regarding the implementation work, as it may have a bearing on how the interviewees respond to the questionnaire. If nothing out of the ordinary happened during implementation and the interviewees appear fine about it, just enter OK in Section 2.

Don't rush the questions. Make sure the interviewees understand each question before giving an answer. Read out the four positive and negative options available as answers. Only volunteer the N/A option if you see no alternative.

The *small italic print in brackets* under some questions is for your information only, do not repeat it at the interview. Some will reference sample documents you have in your Interview Packs. These can be shown to help identify the documents referred to in the question.

Make sure you ask for any other comments after each question is answered, especially where negatives have been given.

When you get to Section 11 try to contain the responses to relevant issues, concerns and always ask if there are any good news stories the interviewees can share with us. Encourage discussion about their views. Use the additional notes section if needed.

Delete the 'willing/unwilling to be contacted again' statement as appropriate.

Thank the interviewee for their time, shake hands, and leave the premises.

## **Follow Up Letters**

A standard letter should be completed. The middle section should be your summary of the interviewee's views, questions, concerns, etc, but not the responses to sections 3 to 10 of the questionnaire.

## **Feedback Reports**

**ICL Pathway      Management Care Visit Programme  
Procedure**

Ref: CS/PRO/033  
Version: 0.2  
Date: 07/08/97

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Keep the completed questionnaires and reports confidential and secure.  
Return them to the Customer Satisfaction Manager as soon as possible.

Reprint the questionnaire and add it to the Interview Pack ready for your next  
Interview. If you are doing more than one a day make sure you take enough  
copies of the questionnaire with you.