Mails conversation

The science behind the 5Ws

	WHERE is it going?	WHAT'S inside? For the purpose of safety	WOULD you like it to get there tomorrow? Inland	WHEN would you like it to arrive? International	WHAT'S the value?	WOULD you like a signature or tracking?

It is important to ask the right questions to find out the customer's needs and to be able to offer the correct service. There are reasons why we ask certain questions when a customer comes in to post an item, to make sure we are recommending the most appropriate service that matches their needs.

WHERE is it going?	You need to know if the item is an inland or international item to make sure you quote the correct service and price. Customers sometimes don't offer the destination and will assume you can tell. In addition, the rules for Prohibited and Restricted items are different between inland and international, and even if you have seen where the item is going to or the customer has given you the information already, there is no harm in confirming the fact, as this displays confidence in what you are doing.
WHAT's inside? For the purpose of safety	Firstly, the customer needs to understand why you are asking the question. You need to be sure that the item the customer is sending is not prohibited or restricted. You do this by asking "for the purpose of safety what's inside the parcel?", as this explains why you need to know. In doing so, the customer is more likely to give you the information. Refrain from simply asking "what's inside?" as the customer may think you don't need to know and give a negative response.
WOULD you like it to get there tomorrow? **WHEN would you like it to arrive? (International)**	These are the Inland/International 'speed' questions and they will give you information that you can use to offer the correct service to the customer quickly and efficiently. The customer may answer yes to the question (Inland) or indicate how many days they want the item delivered in; in which case you would be able to recommend our Inland/International Guaranteed services straight away. However, always remember to ask the next question to find out the value of the item as all guaranteed services offer different levels of cover for the customer's item.
WHAT's the value?	Keeping it simple by asking "what's the value?" will prompt the customer to give you an actual amount, rather than you having to ask multiple questions to ascertain the value. You need to know the value in order to understand the compensation requirements. Don't simply ask "is it worth more than...?" There are two main reasons why this question does not work effectively: **1.** The customer may answer yes to the question and you then have to ask another question to clarify further. **2.** The customer can also be suspicious about the question and they think if they answer "yes" to the question it will likely cost them more money to send their item. Direct yet simple keeps you on track.
WOULD you like a signature or tracking?	This helps you to understand the importance of the item. If the item is important enough to require a signature or tracking, then it is important that your customers get peace of mind that their item has been delivered.

Remember: Ask the 5Ws questions for all mails items, letters and parcels. It is important to remember that customers often come in and ask for a particular service without fully understanding the features and benefits of the service they have asked for, or all of the options available to them. It's our job to ask customers the right questions, to make sure we understand their requirements and advise them of products and services accordingly.

POL00448125

Mail Services

Royal Mail Inland

Royal Mail offers different levels of inland mail service at Post Office. Asking the 5Ws questions to every customer posting an item will help you to offer the right services to meet their needs:

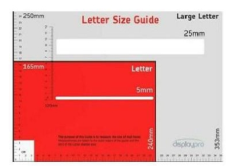
- **Special Delivery by 9am and Special Delivery by 1pm:** tracked, guaranteed and includes a photo and signature on delivery. Saturday delivery also available
- **Tracked 24 and Tracked 48**: tracked, photo on delivery, delivery aim of 24/48 hours. Tracked 24 and Tracked 48 with signature captures a photo and signature on delivery
- **1st Class Signed For and 2nd Class Signed For:** signature on delivery
- 1**st Class and 2nd Class:** standard delivery

Note: Please see Section 07 and Section 08 for International services and customs information

Measuring items of mail

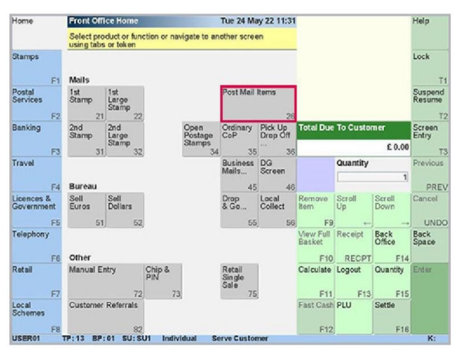
Always use the size guides available to correctly identify the format of an item of mail. If you don't get the format right each item and simply guess wrong, a customer will be charged too much or too little and this will impact on the delivery of their item. To determine the format of an item:

- Ask the customer to place the item on the scales
- For Letter and Large Letters use the Letter template
- Small parcels can be checked using the small parcel guide, but if in doubt, use the tape measure
- For medium and large parcels always use the tape measure
- Size and weight limits information can be found in the 'Royal Mail Our Prices' leaflet, and on Horizon Help



To process an item of mail

- Weigh the item and check the size to determine the format
- Select 'Post Mail Items' from the Front Office Home screen
- Ask the customer the 5Ws questions, and use their answers to make the relevant selections on Horizon
- Offer the appropriate service to the customer that best meets their needs, and press 'Select' next to the service
- For relevant mail items and all Special Delivery items, follow the process for processing prohibited and restricted items (see next page)
- Input address details when prompted and continue to print a label



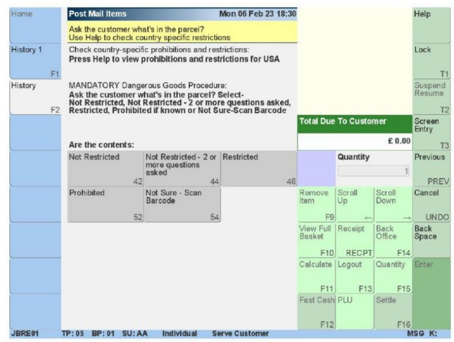
POL00448125

Mail Services

Prohibited and Restricted items

Always ask the 5Ws questions to every customer sending an item of mail. When a Royal Mail or Parcelforce parcel service, or Special Delivery is selected, the Dangerous Goods screening options will appear. Depending on the contents of the customer's item:

- Clarify the contents with the customer
- Select the appropriate option on the DG Screening screen and follow the prompts
- For restricted items a label may need to be applied – read all screen prompts carefully
- If an item is prohibited, politely refuse the item. Horizon will produce a receipt for the customer. Hand this to them with a copy of the Dangerous Goods leaflet
- The option to scan the laminate is available if you are unsure of the contents



Top Tip: You can complete the Dangerous Goods process before processing a mail item if you think that the item might be prohibited and therefore cannot be sent. Select 'DG Screen' on the Home screen, and you will be taken straight to 'DG Screening'.

Parcelforce

When processing a Parcelforce item, it is important to remember:

- For Parcelforce Guaranteed services, a Horizon label is not printed
- The customer receipt will print before the transaction is settled – remember to take payment
- Hand all Parcelforce customers a copy of the 'Conditions of Carriage' leaflet and ask them to sign their receipt to confirm they have received it
- Complete the date of despatch details on the label
- Fill in the boxes on the label to show how many parcels there are, for example, for a customer sending one parcel, you would write '1 of 1'

POL00448125

Mail Services

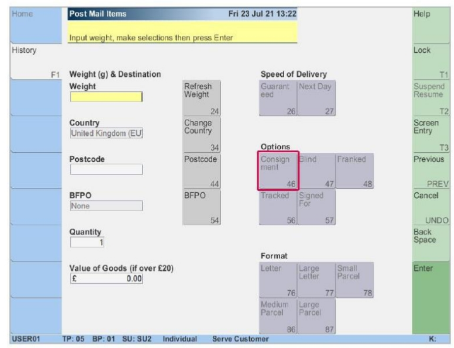
Parcelforce Consignment

If a customer has more than one item going to the same address by the same service, the parcels can be sent as one consignment.

A maximum of 15 separate items can be sent as a single consignment, and the customer is charged for the total weight of the items.

To process a customer's items as a consignment:

- Select 'Post Mail Items' from the 'Home Screen'
- Ensure the total weight of all the items is entered on the 'Post Mail Items' screen
- Select 'Consignment' from the service selection criteria
- Continue the transaction following the usual mails acceptance process, including Dangerous Goods where applicable
- When requested, scan a barcode for each item until you have captured all of the consignment items
- Press 'Enter' to continue. A certificate of posting will be printed for the whole consignment
- Fill in the boxes on the label to show how many parcels there are, for example, for a customer sending three parcels as a consignment you would write '1 of 3', '2 of 3', '3 of 3'



Remember:

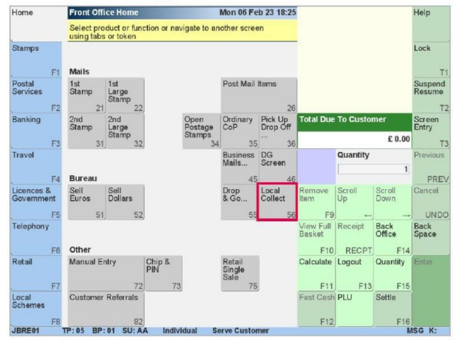
- There is no limit to the weight of a multi-parcel consignment but individual parcels cannot exceed 30kg. When you select 'Consignment' on the 'Post Mail Items' screen, Horizon will remind you to enter the total weight of the consignment
- Compensation included is for the entire consignment, so the value of all the items together should be entered into the 'Value of Goods' field

Collections and Returns

Customer collections

Royal Mail and Parcelforce Worldwide provide customers with the option to collect their mail from Post Office branches. There are four collections services:

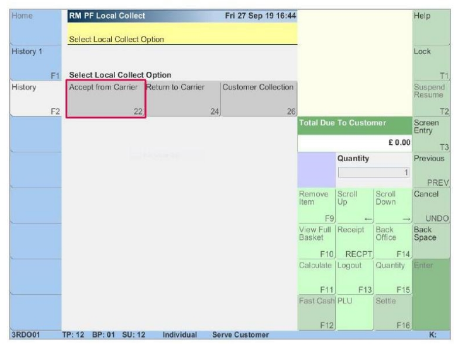
- Royal Mail Local Collect
- Royal Mail Redelivery
- Parcelforce Worldwide Convenient Collect
- Parcelforce Worldwide Convenient Delivery



Accepting mail items into the branch

The Royal Mail delivery officer will scan the items as they are handed over to you:

- If a signature is needed, the Royal Mail delivery officer will ask you to sign the PDA device. When the customer tracks the delivery, they will see the branch name
- If a signature is not needed, simply accept the mail item/s from the delivery officer
- The Parcelforce delivery officer will scan the items before handing them over to you, and you will need to sign the delivery officer's PDA device



You need to confirm receipt of all Royal Mail and Parcelforce items by scanning them into Horizon as soon as possible after accepting them from the delivery officer. Scanning the items acknowledges that they are in your branch and forms part of the tracking process.

To enter them into Horizon:

- From the 'Home Screen' select 'Local Collect', then 'Accept from Carrier'
- Scan the barcode
- Then store the item/s securely
- A notification will be sent to the customer to inform them their item is ready to collect

Remember:

- All items need to be scanned in on the same day they are accepted from the delivery officer
- For Royal Mail Tracked, Royal Mail Special Delivery Guaranteed and Royal Mail Signed For items, scan the service barcode
- Only keep uncollected items for the agreed retention period, before scanning them out by selecting 'Return to Sender' on the 'Local Collect' screen

Service	Barcode to scan	Example
Royal Mail Redelivery (standard non-barcoded items)	Barcode on the 'Redelivery to Post Office' label	
Royal Mail Redelivery (Special Delivery, Tracked 24 and Tracked 48 and Signed For)	Service barcode on original label	
Royal Mail Local Collect	Service barcode on original label	
Parcelforce Worldwide	Service barcode on original label	

Collections and Returns

Customer collections

Local Collect Age and ID Verification

Local Collect items with 'Age Verification' printed on the label, as shown, can only be collected by customers who are over 18 years old. The only acceptable ID for this service is a valid passport, driving licence or the Post Office Easy ID app.

You don't need to check Age Verification ID if the customer is clearly over 25 years old.

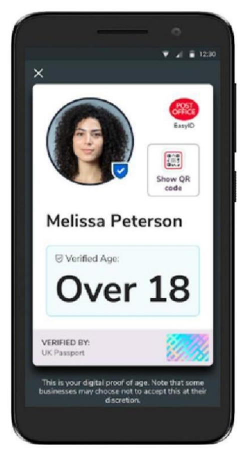
Local Collect items with 'ID Verification' printed on the label, as shown, can only be collected by the **addressee** (the person named as the recipient on the label). Only valid photo ID is acceptable for this service, such as passport, driving licence, other photo ID cards such as an NHS or Royal Mail employee card or the Post Office EasyID app.

You should not give ID verification labelled items to friends, family or neighbours of the intended recipient, even if they produce valid photo ID of the addressee.

Customers using EasyID to collect items

Customers can use the Post Office EasyID app to prove who they are when collecting parcels at Post Office. EasyID will also confirm their age for Age Verification items.

The customer simply shows their EasyID on their smartphone.



Local Collect Inflight

Local Collect Inflight is a delivery option for customers receiving items sent by retailers using Royal Mail Tracked 24/48 and Special Delivery Guaranteed by 9am/by 1pm items. It allows the recipient to change when and where their item is delivered, after it has been posted by the sender. One of the delivery options for customers is a Post Office branch.

- Customers who opt to change the delivery to a Post Office branch will see a list of the five nearest branches
- Royal Mail will apply an Inflight label with the new delivery address to the mail item next to the original label. Normal acceptance procedures apply when you accept an Inflight item into your branch
- There is no fee payable by the customer for this service

Collections and Returns

Customer collections

Customer collecting an item from the branch

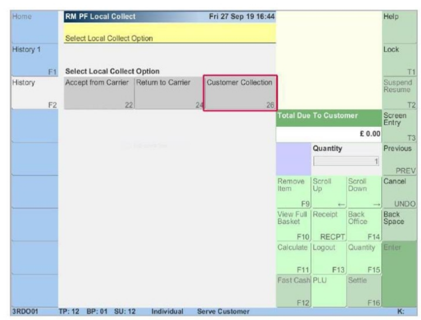
Before you do anything on Horizon, please accept the missed delivery card or order confirmation from the customer and check their ID. If a customer doesn't have a missed delivery card or order confirmation, they will need to produce two forms of ID, one of which needs to show their address. There is a complete list of acceptable ID on Horizon Help.

Locate the parcel and check the following:

- Is the tracked barcode number the same as on the missed delivery card OR the order confirmation email/text message?
- Is the name on the parcel the same as the ID shown? (remember – if someone else is collecting the parcel for the recipient, they need to show ID for the recipient, not for themselves)

To complete the collection on Horizon:

- From the 'Home Screen' select 'Local Collect', then 'Customer Collection' and scan the barcode on the Local Collect label
- Check the customer's ID and complete the Alternative Collection Service card P5769
- Obtain a signature and press 'Enter' to continue. Horizon will identify any extra checks for Local Collect age and ID verification
- Select option: 'No Fee payable' or 'Fee payable'. For some Parcelforce Convenient Delivery items there is a £1 fee to pay, so make sure to check the label
- If there is a £1 fee, collect it from the customer and place it in the till



Note: If a fee is applicable and the customer does not have or refuses to pay it, do not issue the item to them and cancel the transaction.

- Press 'Settle' to complete the transaction and hand the item to the customer. If a fee was payable, then the system will print a receipt
- Destroy all missed delivery cards that you have accepted from customers in return for their items, either after each transaction or at the end of the day. It is important that these are destroyed completely (i.e. so that all personal details recorded on them can no longer be read), as they contain customers' names and addresses etc.

Important: Please retain all P5769 Alternative Collection Service cards in branch for two years.

POL00448125

Collections and Returns

Mail Returns and pre-paid items (Click & Drop)

The Royal Mail Returns service allows internet retailers to provide a customer with a special label they can use to return an item. This can be done at any Post Office branch for free.

There are two main types of Royal Mail Returns:

- Labels to Go, including Click & Drop pre-paid items
- Tracked Returns using a barcode supplied by the retailer

Note: You don't need to follow the Prohibited and Restricted process for any Royal Mail Returns services.

1. Labels to Go returns and pre-paid postage (Click & Drop)

Labels 2 Go is available to customers using a Royal Mail pre-paid returns service or where a customer has purchased postage online using the Royal Mail Click & Drop service:

- Customers will bring a barcode, either on their phone or printed out, and their parcel which will have no labels on it
- Make sure the barcode is a standalone barcode within an email and not part of a returns label
- From the 'Home Screen' scan the barcode
- Insert a Post2 postage label into the printer – this will print the recipient's address and barcode

Note: Check the quality of the printed label. If it is not clear, select to reprint the label. Poor label quality results in delayed items, or tracking not being available to the customer

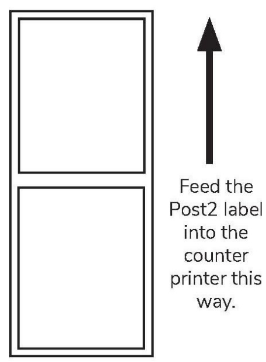
- Attach the label onto the front of the item
- Input the weight and press 'Enter'
- Issue the customer with a free certificate of posting receipt

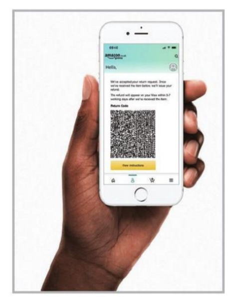
2. Tracked Returns using a barcode supplied by the retailer

- From the 'Home Screen' scan the 2D barcode on the label
- Check that the return address that appears on Horizon matches the destination address on the pre-printed label; if it doesn't, politely refuse the parcel
- Input the weight and press 'Enter'
- Issue the customer with a free certificate of posting receipt

Remember! Please check that pre-paid return items do not exceed the size and weight limits for the Returns product:

- 1.5m length (3m combined length+width+height), with a 20kg weight limit
- Segregate all return items into the correct mail bags





Important! Check that all Tracked Returns labels have all the required fields, as indicated on the label above in red. If any are missing, please politely refuse to accept the item.

Segregating mail

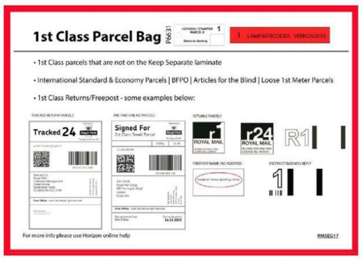
Mails segregation is an important part of mail acceptance in your branch and involves separating certain items before the Royal Mail collection.

Mail is segregated first by format (size) and then by product (class or type of mail).

Organise the 'ordinary' bags in this order:

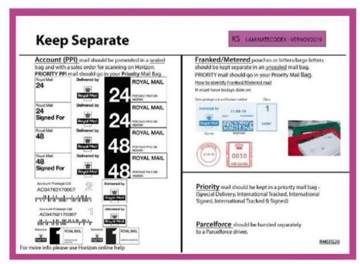
Important: If a customer pays for a parcel to be sent 1st Class and it's placed in the 2nd Class Parcel bag in error, the item will be delayed for the recipient and the customer won't receive the service they paid for.

Royal Mail prioritise the processing of 1st Class mail.



When segregating mail items, remember the following points:

- The 'Keep Separate' laminate shows which items should be stored separately from the ordinary mail
- Franked/Metered pouches or letters should be kept separate in an unsealed mail bag. The 'Keep Separate' laminate shows how to identify Franked/Metered mail
- Letter/Large Letter sized items over 750g are treated as a parcel
- International Standard Letters/Large Letter should be placed in the Letters/Large Letters bag
- International Standard Parcels should be placed in the 1st Class Parcels Bag
- Standard grey mail sacks should be used, except for Royal Mail Special Delivery items which should be placed in green sacks where available
- Seal all bags with a plastic tie and the appropriate bag label attached (except Franked/Mailmark and Account Mail) and tuck in the long end of the tie
- Bags should weigh no more than 11kg each
- For branches with Self-Service Kiosks all mail should be checked and fully segregated
- Franked/Signed for Large Letter sized items should be placed in the loose items bag for franked mail
- Do not put Account Mail (PPI) in any mail bag. These items should be kept separate in a sealed bag for each customer. For PPI operational instructions go to Horizon Help, Postal Services, Inland Operational Instructions, Account Mail bearing Printed Postage Impressions (PPI)
- Clear all items from your branch at each collection



Top Tip! Each laminate shows which items go into each Horizon bag. If you are not sure, check the item against the information on the laminates.

The 2D labels contain a segregation indicator, in the bottom right corner, to assist with mails segregation.

Drop & Go in branch

To access Drop & Go services, select ‘Drop & Go’ on the ‘Home Screen’. The options available in the Drop & Go menu are:

- Balance and Top-Up
- Count Mails
- Start Mails
- Open Account
- Edit Account
- Request Close
- Complete Close
- Replace Account/ Card Number

Count Mails: Customer drops off their items

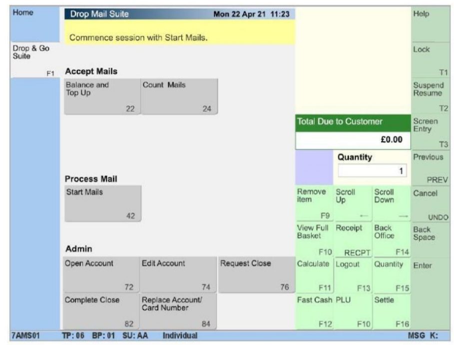
The customer will bring in their items with a completed manifest containing their 8-digit account number:

- Check that the customer has completed the manifest, listing the services they require for each parcel
- Ask the customer if they are sending prohibited or restricted goods. If any parcels contain restricted goods, they will need to use the normal counter service and the restricted items can be followed. If any parcels contain prohibited goods, advise them they cannot be sent
- From the ‘Home Screen’ select ‘Drop & Go’ and then ‘Count Mails’
- Enter the customer’s Drop & Go account number and press ‘Enter’
- Confirm the customer details are correct. The prompt will show if the customer has opted in to ‘Auto Top-Up’. If not, they will be given the option to top-up now
- Enter the number of items the customer is sending and check it matches the manifest
- Horizon will prompt to ask if the customer requires a Certificate of Posting, and will state the latest date it will be held in branch for them to collect
- Select ‘Settle’. Horizon will print two mails acceptance receipts. Give the customer one copy and staple the other copy to the manifest

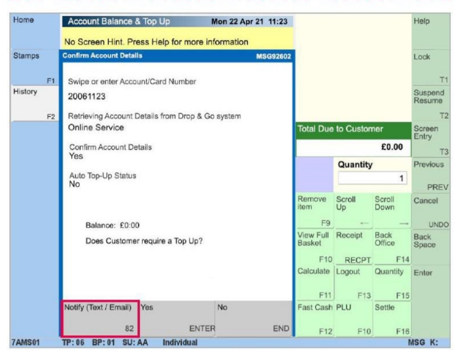
Auto Top-Up function

The Auto Top-Up function ensures that the balance on the customer’s account will always cover the services requested.

- If a customer does not have Auto Top-Up activated, an opt-in message will appear on Horizon when they top up in branch. An email is then sent to the customer explaining how to set this up online
- If a customer has opted in to Auto Top-Up but does not have enough balance to cover the transactions, from the Drop & Go home screen select ‘Initiate Auto Top-Up’. The customer’s account will then be topped up by an amount set by the customer



Remember: If some of the details don’t match, they can be updated by selecting ‘Edit Account’ in the ‘Drop & Go’ menu, or the customer can update them online. (ID is required for some changes made in branch, please check on Horizon Help for details).



Important: Auto Top-Up ‘Opt-In’ and ‘Opt-out’ options are available via ‘Edit Account’. The customer will then be notified by email how to add/remove this via their online account.

Drop & Go in branch

Processing Drop & Go items

Process the items the same working day, or as agreed with the customer if the last collection time has passed:

- From the Horizon 'Home screen' select 'Drop & Go' and then 'Start Mails'
- Enter the customer account number and press 'Enter'
- Check the customer account details are correct and that there is enough balance available
- If the available balance is low and the customer has Auto Top-Up activated, the 'Initiate Auto Top-Up' button will be available. Select this button and the customer's account will be topped up with an amount set by the customer
- If the available balance is low and the customer does not have 'Auto Top-Up' activated, the 'Notify (Text / Email)' button will be available. Select this button and the customer will be notified (via their preferred communication preference) that a Top-Up is required

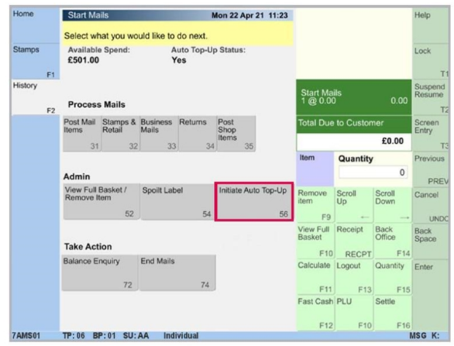
Important: The 'Initiate Auto Top-Up' and 'Notify Text/ email' buttons should only be selected when there is not enough balance to cover the items being posted

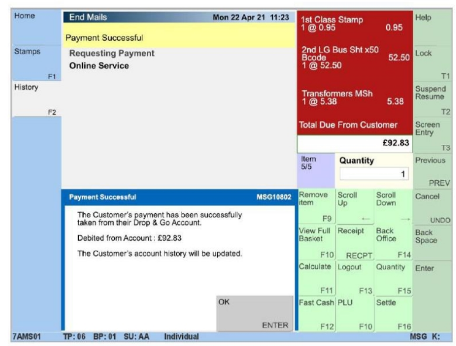
- From the 'Drop & Go' screen select 'Post Mail items
- Process the items as detailed on the manifest
- Once completed, select 'End Mails' and then 'Settle'. The customer's account will now be charged
- Retain all the receipts and attach these to the manifest, to return to the customer when they are next in branch

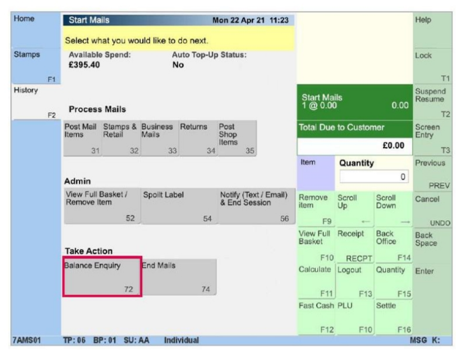
Close to 'real time' account balance

When you process mail items using Drop & Go, the customer's balance is displayed on the screen:

- As Drop & Go mail items are processed the customer's balance will update on the screen as each item is added to the basket
- If Horizon is left idle it is advised to the screen to keep the balance updated; select 'Balance Enquiry' on the 'Start Mails' screen
- If the balance falls below what is needed to complete processing all of the items and Auto Top-Up is not enabled, select 'Notify (Text/Email) & End Session' on the 'Start Mails' screen to notify the customer that a top-up is required







Remember! Support with all Drop & Go process can be found on:

- Horizon Help
- Branch Hub: Type 'Drop and Go' into the search bar on the home page, or select the 'Training' tile to access the Drop & Go Distance Learning Pack