



Branch Operational Training Catalogue



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V10.0 June 2023

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1. Introduction

At Post Office we have a blended learning approach to operational branch training. For new Branch Managers, Postmasters and assistants it gradually builds up knowledge of Post Office products and services and how to provide an excellent customer experience in branch. The aim is to ensure that new Branch Managers, Postmasters and assistants can do the basics brilliantly and are safe, legal and compliant to trade.

The learning offer is also available to existing Branch Managers and Postmasters to train new people or to provide refresher training.

In this catalogue we explain:

1. The blended learner journey for all new Branch Managers, Postmasters and assistants
2. How the operational training can be accessed by existing Branch Managers, Postmasters and assistants
3. The further operational learning available to all

We will also explain how the training is assigned to learners, how long it will take to complete, where to go to for help with your learning needs and how to give us feedback on the learning offer.

Note: Throughout this document we will use the term Branch Manager to mean a postmaster, branch manager or person in charge of running a Post Office branch.

Operational Training Catalogue updates

There might be a later version of this catalogue available when you next refer to it, so please always check. For Strategic Partners go to [Operational Guidance | One Post Office](#), all other branches go to Branch Hub BranchHub.postoffice.co.uk/bh for the latest version.

How to Contact Us

For further information on compliance or to give us feedback on the compliance training, please email:

GRO

For further information on branch training or to give us feedback on the operational training, please email:

GRO

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2. Branch blended learning

When a new Branch Manager is appointed or an existing Branch Manager requests training, we ask for the details of the individual learners. We then create the learner accounts and assign the online learning on our web-based learning system. Learners receive an email confirmation.

The learning website can be found at postoffice.learning.uk.com

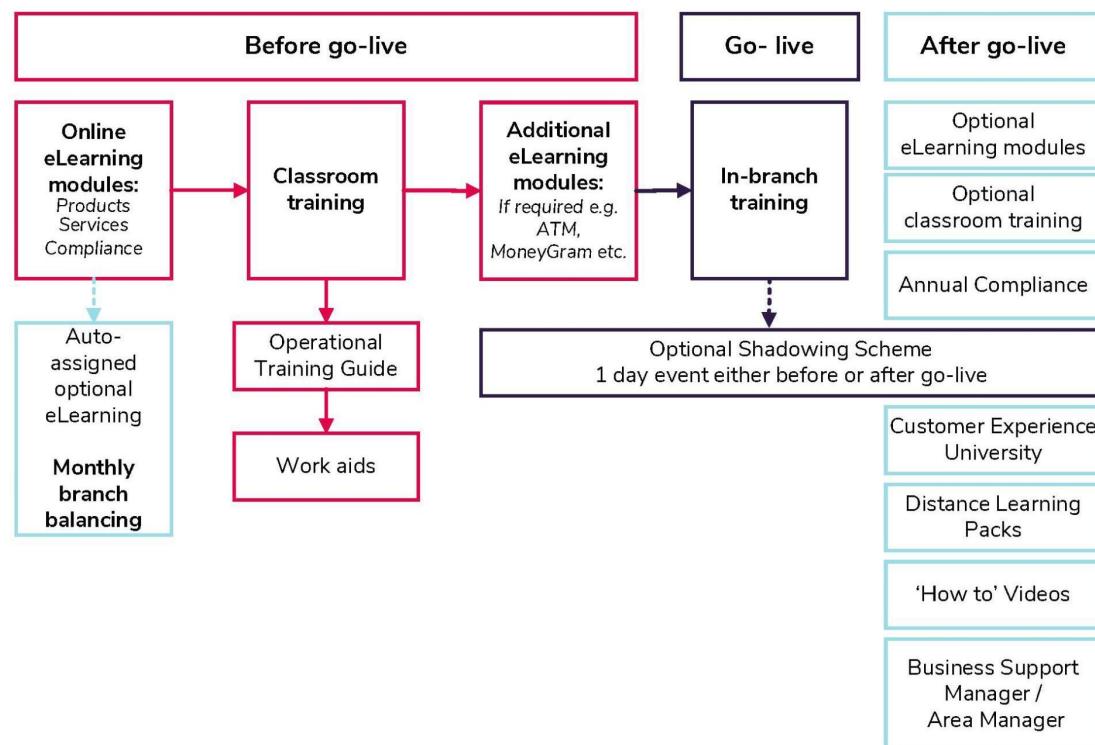
Note: It is also possible to go to the learning website and self-register for an account. Once approved, you can self-assign any of the branch learning. See the 'Summary of available training' section of this catalogue.

We can also book the learners onto the face-to-face classroom courses. All learners need to complete the online learning programme(s) before attending the classroom course, so we give everyone a few weeks to complete it.

At the face-to-face courses learners consolidate what they have learned so far, use a Horizon training system to practise transactions and practise the customer conversations. We also hand out an operational training guide and work aids to support learners back in the workplace.

After that, if the branch has additional services such as ATM and/or a Camelot Lottery terminal there are eLearning modules to complete before go-live. We then have further optional training available.

This is the Local/Main/Directly Managed branches onboarding learner process:



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Benefits of the different learning methods

Online eLearning purpose

- To provide bitesize training on products, services and procedures
- To provide consistent and up-to-date learning that is available 24 hours a day / 7 days a week
- To allow learners to learn at their own pace
- To provide a consistent test of the key learning points
- To allow learners to repeat the learning at any time to refresh their understanding

Classroom training purpose

- To practise transactions using the Horizon training system
- To build capability on completing transactions and processes
- To build confidence in talking to customers about our products and services
- To receive face-to-face feedback and support from a Post Office trainer

There are three courses that make up the onboarding training for learners new to Post Office.

Course name	Audience
2 day Basic Transactions	All Branch Managers and assistants and Directly Managed Branches
1 day Back Office	All Branch Managers or anyone responsible for running a branch All branch assistants who complete the monthly balancing of a stock unit
1 day Basic Transactions Part 2	All Main Branch Managers and Main assistants and Directly Managed Branches

In-branch training purpose:

- To give a new branch manager on-site support for setting up their new branch
- To help embed the learning when serving customers for the first time
- To provide in-branch training on products/services/procedures that could not be done in the classroom
- To provide support during the first monthly branch balance

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Online eLearning

Basic Transactions – all branch types

Learning aim:

To introduce learners to the basics of Post Office products and services available in their branch.

Each module includes an assessment quiz to test the learner's knowledge.

Learners need to pass all modules with a score of 100% (there's no limit to the number of attempts).

Audience:

All new Branch Managers and branch assistants

Learning assigned by:	Support team
Post Office Limited	<p>For newly appointed Branch Managers and assistants the learning is assigned by: GRO</p> <p>For existing Branch Managers with a new assistant to train, please email: GRO</p>
Location	Detail
Online Learning website	postoffice.learning.uk.com
Course name	Module names
Introduction	Introduction to Post Office and Learning
Mails	<p>Mails Basics</p> <p>Royal Mail: Inland Mail</p> <p>Parcelforce Worldwide: Inland Services</p> <p>Royal Mail: Collections and Returns</p> <p>Royal Mail: International Mail</p> <p>Inland Mail Redirection Services</p>
Travel	Travel Money Services
Banking Services and Automated Payments	<p>Banking Services</p> <p>Payment Exception Service: i-movo voucher service</p> <p>Automated Payments</p> <p>Postal Orders</p>
Procedures	Physical Security
Compliance	<p>Information Security and Data Protection</p> <p>Anti-Money Laundering and Counter Terrorist Financing Awareness</p> <p>Mails Compliance</p> <p>Mails Prohibited and Restricted</p> <p>Modern Slavery and Human Trafficking</p>

Approximate timing

On average it will take 9 hours to complete the programme. It should be done over a number of days or weeks. We recommend that learners use the planner available in the Introduction to Post Office & Learning module to plan when they will complete each training module.

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Basic Transactions Part 2 – SPSO, Main & Directly Managed Branches

Learning aim:

To introduce learners to the basics of Post Office products and services that are available in Main and Directly Managed Branches and some SPSO branch types.

Each module includes an assessment quiz to test the learner's knowledge.

Learners need to pass all modules with a score of 100% (there's no limit to the number of attempts).

Please note: There are four variations of the programme. You will be assigned the correct one based on whether your branch completes DVLA and/or Passports transactions.

Audience:

All new Branch Managers and branch assistants

Learning assigned by:	Support team
Post Office Limited	For newly appointed Branch Managers and assistants the learning is assigned by: GRO
Post Office Limited	For existing Branch Managers with a new assistant to train, please email: GRO

Location	Detail
Online Learning website	postoffice.learning.uk.com
Course prerequisites	

Learners will complete the Basic Transactions programme (approx. 9 hours) before starting Basic Transactions Part 2 programme

Course name	Module names
Travel Services	Travel Insurance
Mails	Parcelforce Worldwide: International Services
Financial Services	Savings Products Life Products Car and Home Insurance
Compliance	Financial Services Insurances
Programme varies depending on branch needs	DVLA Driving Licence DVLA Vehicle Registration DVLA Taxing a Vehicle Passport Services

Approximate timing

On average it will take 4 to 5 hours to complete the programme.

We recommend that learners use the planner available in the Introduction to Post Office & Learning module to plan when they will complete each training module. It should be done over a number of days or weeks.

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Classroom training

2 day Basic Transactions course – all branch types

Learning aim:

The aim is to consolidate the product and service knowledge gained from the Basic Transactions online programme and introduce the learners to the Horizon system and customer conversations.

Audience:

- All new Branch Managers and branch assistants and Directly Managed Branches
- For existing Branch Managers with a new assistant to train
- Existing Branch Managers or branch assistants who have had little or no experience on the counter since their initial training and need refresher training to provide cover in branch

Learning assigned by:	Support team
Post Office Limited	For newly appointed Branch Managers and assistants the learning is assigned by: GRO
Post Office Limited	For existing Branch Managers with a new assistant to train, or for refresher training for existing Branch Managers or assistants, please email: GRO
Location	Detail
Classroom	A Post Office Centre of Excellence There are approximately 16 of them across the UK

Course prerequisites

Before attending the classroom course, learners need to complete:

- Basic Transactions online learning programme

Course content

Day 1	Security Introduction to Horizon Customer Experience Banking Services Automated Payments Inland mail End of day activities
Day 2	International mail Travel money Dealing with difficult customers

Support materials

Operational Training Guide

Timing

2 day

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1 day Back Office course – all branch types

Learning aim:

The aim is to provide basic back office training on the daily, weekly and monthly balancing processes using the Horizon system.

Audience:

- All new Branch Managers and branch assistants and Directly Managed Branches
- For existing Branch Managers with a new assistant to train
- Existing Branch Managers or branch assistants who have had little or no experience on the counter since their initial training and need refresher training to provide cover in branch
- Branch assistants new to completing the back office activities

Learning assigned by:	Support team
Post Office Limited	For newly appointed Branch Managers and assistants the learning is assigned by: GRO
Post Office Limited	For existing Branch Managers with a new assistant to train, or for refresher training for existing Branch Managers or assistants, please email: GRO
Location	Detail
Classroom	A Post Office Centre of Excellence There are approximately 16 of them across the UK

Course prerequisites

Before attending the classroom course, learners need to complete:

- Basic Transactions online learning programme

Course content

Completion of Horizon basic transactions
Daily accounting activities
Weekly (Balancing Period) accounting activities
Cash Management
Remittances
Monthly (Trading Period) accounting activities
DVLA (optional based on branch needs)

Support materials

Operational Training Guide

Work aids

Timing

1 day

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1 day Basic Transactions Part 2 course – SPSO, Main & Directly Managed Branches

Learning aim:

The aim is to consolidate the product and service knowledge gained from the Basic Transactions Part 2 online programme and allow learners to practice the Horizon system transactions and customer conversations.

Audience:

- All new appointed Branch Managers and branch assistants in **SPSO, Main and Directly Managed Branches**
- For existing Branch Managers with a new assistant to train
- Existing Branch Managers or branch assistants who have had little or no experience on the counter since their initial training and need refresher training to provide cover in branch

Learning assigned by:	Support team
Post Office Limited	For newly appointed Branch Managers and assistants the learning is assigned by: [REDACTED] GRO
Post Office Limited	For existing Branch Managers with a new assistant to train, or for refresher training for existing Branch Managers or assistants, please email: [REDACTED] GRO
Location	Detail
Classroom	A Post Office Centre of Excellence There are approximately 16 of them across the UK

Course prerequisites

Before attending the Basic Transactions Part 2 classroom course, learners need to complete:

- Basic Transactions online learning programme
- Basic Transactions Part 2 online learning programme
- Basic Transactions classroom course

Course content

DVLA
Parcelforce Worldwide International services
Travel Services:

- Travel Money
- Travel Insurance

Introducing Post Office products:

- Financial Services
- Customer Referrals

Information security and data protection
Passport Check and Send
End of day activities
Weekly balancing

Support materials

Operational Training Guide

Timing

1 day

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Additional online eLearning: complete before go-live

Additional online eLearning purpose:

The additional eLearning has been created to cover products and services that are not widely available in all branches. The modules can be completed any time before a new Branch Manager goes live and they will receive further training from the in-branch trainer.

The modules are also available for existing learners to self-assign, as branch assistants may be asked to provide cover for the Branch Manager at different times.

ATM (Automated Teller Machine)

Learning aim:

To provide learners with an introduction to ATMs and the basics on daily and weekly accounting and how to balance your ATM.

The module includes an assessment quiz to test the learner's knowledge.

Learners need to pass with a score of 100% (there's no limit to the number of attempts).

Audience:

New Branch Managers and branch assistants who will maintain and run an ATM

Learning assigned by:	Support team
Post Office Limited	For newly appointed Branch Managers and assistants the learning is assigned by: GRO
Self-assign	Learning website users can also self-assign the module
Location	Detail
Online: Learning website	postoffice.learning.uk.com
Course prerequisites	None. The modules can be completed any time before go-live

Support materials

Work aid
'How to' video x 2

Approximate timing

45 minutes

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Camelot Lottery

Learning aim:

To provide learners with an introduction to Camelot Lottery and the basics on daily and weekly accounting.

The module includes an assessment quiz to test the learner's knowledge.

Learners need to pass with a score of 100% (there's no limit to the number of attempts).

Audience:

New Branch Managers and branch assistants who will manage Camelot Lottery transactions

Learning assigned by:	Support team
Post Office Limited	It will be assigned by <u>GRO</u> to all new Branch Managers that have a Camelot Lottery terminal.
Self-assign	Learning website users can also self-assign the module
Location	Detail
Online: Learning website	postoffice.learning.uk.com
Course prerequisites	None. The module can be completed any time before go-live
Course content	Scratch cards Prize payments Lottery accounting
Support materials	Work aid
Approximate timing	30 minutes

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MoneyGram

Learning aim:

To provide learners with an introduction to MoneyGram Send and MoneyGram receive transactions.

The module includes an assessment quiz to test the learner's knowledge.

Learners need to pass with a score of 100% (there's no limit to the number of attempts).

Audience:

New Branch Managers and branch assistants who will complete MoneyGram transactions

Learning assigned by:	Support team
Post Office Limited	It will be assigned by <u>GRO</u> to all new Branch Managers and assistants if their branch completes MoneyGram transactions.
Self-assign	Learning website users can also self-assign the module
Location	Detail
Online: Learning website	postoffice.learning.uk.com
Course prerequisites	None. The module can be completed any time before go-live
Course content	MoneyGram Send MoneyGram Receive Other services

Support materials

Operational Training Guide

Approximate timing

20 minutes

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Western Union

Learning aim:

To provide learners with an introduction to Western Union Send and receive transactions.

The module includes an assessment quiz to test the learner's knowledge.

Learners need to pass with a score of 100% (there's no limit to the number of attempts).

Audience:

New Branch Managers and branch assistants who will complete Western Union transactions

Learning assigned by:	Support team
Post Office Limited	It will be assigned by GRO to all new Branch Managers and assistants if their branch completes Western Union transactions.
Self-assign	Existing learning website users can self-assign the module
Location	Detail
Online: Learning website	postoffice.learning.uk.com
Course prerequisites	None. The module can be completed any time before go-live
Course content	Western Union Send Western Union Receive Other services

Support materials

Operational Training Guide

Approximate timing

20 minutes

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Teller Cash Recycler

Learning aim:

To provide learners with an introduction to the Teller Cash Recycler.

The module includes an assessment quiz to test the learner's knowledge.

Learners need to pass with a score of 100% (there's no limit to the number of attempts).

Audience:

- New Branch Managers and branch assistants who will use a Teller Cash Recycler
- Existing Branch Manager and branch assistants who have had a Teller Cash Recycler installed

Learning assigned by:	Support team
Post Office Limited	For newly appointed Branch Managers and assistants the learning is assigned by: [REDACTED] GRO
Post Office Limited	For existing Branch Managers with a new assistant to train, please email: [REDACTED] GRO
Self-assign	Learning website users can also self-assign the module
Location	Detail
Online: Learning website	postoffice.learning.uk.com
Course prerequisites	
Course content	<p>None. The module can be completed any time before go-live</p> <p>An introduction to the Teller Cash Recycler</p> <p>Teller Cash Recycler transactions</p> <p>Top Tips</p>

Approximate timing

20 minutes

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Banking Hub branches only

Learning aim:

To introduce learners to the basics of Post Office products and services that are available in a Banking Hub.

Each module includes an assessment quiz to test the learner's knowledge.

Learners need to pass all modules with a score of 100% (there's no limit to the number of attempts).

Audience:

All new Banking Hub Operators and Banking Hub branch assistants

Learning assigned by:	Support team
Post Office Limited	For newly appointed Banking Hub Operators and assistants the learning is assigned by: GRO
Post Office Limited	For existing Banking Hub Operators with a new assistant to train, please email: GRO
Location	Detail
Online Learning website	postoffice.learning.uk.com
Course name	Module names
Introduction	Introduction to Banking Hub and Learning
Banking Services and Automated Payments	Banking Services Payment Exception Service: i-movo voucher service Automated Payments Teller Cash Recycler
Procedures	Physical Security
Compliance	Information Security and Data Protection Anti-Money Laundering and Counter Terrorist Financing Awareness Modern Slavery and Human Trafficking

Approximate timing

On average it will take 4 hours to complete the programme.

We recommend that learners create a plan to decide how they will complete the training modules.

It should be done over a number of days.

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In-branch training

Learning aim:

The in-branch training builds on and embeds the learning from the online learning programme and the classroom training sessions, providing on-the-job training when new Branch Managers and assistants start to complete live transactions for the first time.

The on-site trainer also provides support for the set-up of a branch for a new Branch Manager.

The key elements of the in-branch support are:

- Up to six days of on-site learning from a Post Office Trainer
- Support in completing a Trading Period balance (follow-up balance)
- Specialist ad hoc training for new (and existing) Branch Managers and assistants

A Business Support Manager is also assigned to the branch for the first six months and they will consolidate and reinforce the training delivered. After that an Area Manager will take over the support of the branch.

Please note: No in-branch training is provided for new branch assistants in existing Post Office branches or Banking Hubs. This should be completed by the existing Branch Manager, Banking Hub Operator or Strategic Partner.

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3. Operational Training Guide

Learning aim:

To provide operational guidance on common transactions to support the learner during the practice sessions in the classroom and back in the workplace.

Audience:

- All new Branch Managers and branch assistants
- For existing Branch Managers with a new assistant to train, or for refresher training for existing Branch Managers or assistants

Learning assigned by:	How
Post Office Trainer	The classroom trainer will hand out the Operational Training Guides as part of the classroom event
Download	Download soft copy PDFs of the operational training guide sections
Location	Detail
Classroom	Hard copy documents printed and handed out in the classroom
Online: Learning website	postoffice.learning.uk.com
Online: Branch Hub	BranchHub.postoffice.co.uk/bh - go to 'Training', 'Operational Training Guide'
Online: One website	For Strategic Partner branches go to: Operational Guidance One Post Office
Operational guides	Content
Individual sections are:	01 Useful information 02 Getting started on Horizon 03 Security 04 Banking & PES 05 Automated Payments 06 Inland Mail 07 International Mail – Royal Mail 08 International Mail – Parcelforce Worldwide 09 Travel Money 10 End of day activities 11 Weekly accounting 12 Monthly accounting 13 Back Office transactions 14 Cash & Stock management 15 Postal Orders 16 Money Transfer Services 17 Passport Check & Send 18 Financial Services products 19 DVLA 20 Troubleshooting

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4. Work aids

Branch Work aids

Learning aim:

To provide a reminder of key processes that need to be completed in branch.

The work aids are A5 laminated sheets held together by a metal ring so they can be put on a hook in branch for easy access.

Audience:

- All new Branch Managers and branch assistants
- For existing Branch Managers with a new assistant to train, or for refresher training for existing Branch Managers or assistants

Learning assigned by:	How
Post Office Trainer	The classroom trainer will hand out one work aid per branch as part of a classroom event
On request	Existing Branch Managers can request a hardcopy work aid by emailing: GRO
Download	Download soft copy PDFs of the work aids
Location	Detail
Classroom	Hard copy documents printed and handed out in the classroom
Online: Learning website	postoffice.learning.uk.com
Online: Branch Hub	GRO go to 'Training', 'Work Aids'
Online: One website	For Strategic Partner branches go to: Operational Guidance One Post Office
Work aid titles	
ATM	
Camelot Lottery	
Remittances	
Investigating Discrepancies	

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Tablet User Work aids

Learning aim:

To provide a reminder of key steps when using the tablet in branch.

Audience:

- All new Branch Managers and branch assistants who use a tablet
- For existing Branch Managers with a new assistant to train, or for refresher training for existing Branch Managers or assistants, who use a tablet

Learning assigned by: How

Download	Download soft copy PDFs of the work aids
----------	--

Location Detail

Online: Learning website	postoffice.learning.uk.com
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Online: Branch Hub	GRO go to 'Training', 'Work Aids'
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Work aid titles

Passport
Tablet Device
DVLA
SIA (Security Industry Authority)

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5. Shadowing scheme for new branch managers

Shadowing Scheme

Learning aim:

To give a new Branch Manager an opportunity to experience life in a branch, ask questions and observe an experienced branch team. It covers some of the activities that can't be covered by the online learning or in the classroom.

This is an optional activity that Branch Managers can sign up to during the suitability assessment interview when taking on a Post Office branch.

Audience:

New Branch Manager

How to register:	Support team
Sign up at suitability assessment interview	The onboarding team will schedule a shadowing day. The Branch Manager can decide if this will be before or after they go live in their own branch
Location	Detail
Post Office Directly Managed Branch (DMB)	We have approx. 70 Directly Managed Branches across the UK who have signed up to provide the shadowing experience in their branch
Shadowing	Areas you might cover
	<ul style="list-style-type: none">• Opening the branch• Security procedures• Back Office processes• Remittances• Mails including managing Drop & Go• Paystation• ATM• Stock Management• MoneyGram• Closing the branch
Support materials	
Branch Shadowing Programme Check List	
Requirements document	
Approximate timing	
1 day	

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6. Further eLearning modules

Monthly Branch Balancing

Learning aim:

To learn the key stages for completing a monthly trading period balance in a Post Office branch.

This is an optional module as new Branch Managers will have:

- completed the classroom training
- received in-branch support at go live
- received follow up training for their first Trading Period balance

Audience:

Branch Manager or branch assistant who is responsible for the monthly Trading Period balance and requires further support.

Learning assigned by:	Support team
Automatically assigned	When a learner completes the Basic Transactions eLearning programme, the balancing module is automatically assigned
Self-assign	Learning website users can also self-assign the module
Location	Detail
Online: Learning website	postoffice.learning.uk.com
Course prerequisites	
Learners will complete:	
• The Basic Transactions online learning programme	
Course content	
	The five key stages of a monthly Trading Period balance Stock unit types and stock discrepancies
Support materials	
PDF versions of these operational guides are available as part of this course:	
• Operational Training Guide	
• Investigating Discrepancies work aid	
Approximate timing	
30 minutes	

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7. Other classroom training courses

½ day Investigating Discrepancies

Learning aim:

To provide training on how to investigate balancing discrepancies in branch.

Audience:

Branch Manager or branch assistant who is responsible for branch balancing and requires further support in identifying common causes of discrepancies and how to correct them.

Learning assigned by:

Support team

Post Office Limited

Please email [\[REDACTED\]](#) **GRO** or the local classroom trainer

Location

Detail

Classroom

A Post Office Centre of Excellence
There are approximately 16 of them across the UK

Course prerequisites

Learners need to be competent in completing counter transactions

Course content

Importance of cash declarations
Back office reports
How to identify the common causes of discrepancies
How to correct a discrepancy

Support materials

Investigating Discrepancies Reports handout

Work aid

Timing

½ day

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8. Distance Learning Packs

Learning aim:

A Distance Learning Pack will provide you with the details of the product or service, some conversation examples to help you to confidently introduce it to your customers and how to avoid common errors to get things right first time.

You can use it in its entirety or pick the relevant sections and print them to help build capability among your team.

Audience:

All Branch Managers and branch assistants who can transact the product or service

Learning assigned by:	How
Self-assign	Learning website users can self-assign the Distance Learning Packs
Download	Download soft copy PDFs of the Distance Learning Packs
Location	Detail
Online: Learning website	postoffice.learning.uk.com
Online: Branch Hub	BranchHub.postoffice.co.uk/bh - go to 'Training', 'Distance learning packs'
Online: One website	For Strategic Partner branches go to: Operational Guidance One Post Office go to 'One Resource Centre'
Distance Learning Pack	Product or service
	Customer Referrals Drop & Go DVLA services Everyday Banking services Inland Mail International Mail Life Protection MoneyGram Motor & Home Insurance Passport Check and Send PCI DSS branch audit Savings Self Service Kiosks Travel Insurance Travel Money Vulnerable Customers

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9. 'How To' Videos

Learning aim:

To provide operational guidance on transactions showing the process and Horizon interactions.

Audience:

- All new Branch Managers and branch assistants
- For existing Branch Managers with a new assistant to train, or for refresher training for existing Branch Managers or assistants

Learning assigned by:	How
Self-assign	The videos are available to watch as and when required
Location	Detail
Online: Learning website	postoffice.learning.uk.com
Online: Branch Hub	BranchHub.postoffice.co.uk/bh - go to 'Training', 'How to videos'
How to Videos	Content
Videos are:	ATM balance on an ATM ATM balance on Horizon Cash Declaration - individual stock unit Cash Declaration - shared stock unit Despatch Report – Amend for missing Special Delivery or Parcelforce items e Top Up Reversal End of Day Cheque Remittance Parcelforce Worldwide Reversal an item using PLU Paystation: Add a user Paystation: Processing an Electric Key or Gas Card Planned Orders: View and amend Postal Order: Encashing Postal Order: Selling Postal Order: Spoiling and Reversing Pre-order Currency Remitting In Cash Remitting In Coin Remitting In Currency Remitting In Stock Remitting Out Cash Remitting Out Coin Remitting Out Currency Remitting Out Stock Reversing a Cash or Currency Remittance Reversing a Stock Remittance

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10. Customer Experience University

Learning aim:

Self-study courses to help you understand the main customer experience drivers and to help improve the customer experience in your branch. This will help you to retain your current customer base and win new customers.

Audience:

All Branch Managers and branch assistants

Learning assigned by: How

Download Download soft copy PDFs

Location Detail

Online: Branch Hub BranchHub.postoffice.co.uk/bh - go to 'Training', 'Distance learning packs'

Module name Content

Foundation	Reflect on your current level of performance Retailer visits Customer surveys Key customer drivers What behavioural actions can you do to improve customer experience
------------	---

Advanced	Caring for Customers Soft Skills Customer Types Adapting to different customers Difficult customers Vulnerable customers Growing your business by delivering excellence
----------	---

Timing

Self Study over 3 months Foundation

Self Study over 3 months Advanced

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11. Sales Training

Learning aim:

To provide a toolkit of resources covering how to sell effectively and compliantly in branch.

Audience:

All Branch Managers and branch assistants who can transact the product or service

Learning assigned by: **How**

Download	Download soft copy PDFs Videos are available to watch as and when required
----------	---

Location **Detail**

Online: Branch Hub	BranchHub.postoffice.co.uk/bh - go to 'Training', 'Browse our Sales Training'
--------------------	---

Branch Hub tile **Content**

Sales Process	Customer Referrals Process
Conversation Starters	Protection Toolkit
Top Tips	Staying ahead of banking letter Staying ahead of banking guide
Videos	<p>Drop & Go 'How to':</p> <ul style="list-style-type: none">• Create a manifest from a linked eBay marketplace• Link an eBay marketplace to an existing Drop & Go account• Search for sent items, top-up and check account history online <p>Travel Insurance – Getting it right for customers</p>

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12. Annual Compliance – Required Learning

Learning aim:

Annual compliance training is needed to meet the regulatory and contractual needs of the business and ensure that branches are safe, legal and compliant to trade.

Remember: The compliance calendar for the year can be found on Branch Hub.

Please note: The Compliance test needs to be completed on Horizon to maintain your access to the Horizon system and/or the product or service.

Audience:

- All Branch Managers and branch assistants need to complete compliance training annually
- New Branch Managers and branch assistants need to complete the compliance training before they can start serving in branch

Learning assigned by:	How
Post Office Limited	The compliance modules are part of the eLearning completed before the classroom training
Location	Detail
Horizon Help	Compliance workbooks
Online: Branch Hub	BranchHub.postoffice.co.uk/bh - go to 'Training', 'Annual compliance workbooks'
Online: One website	For Strategic Partner branches go to: Operational Guidance One Post Office go to 'Branch Focus & Useful Info', 'Compliance workbooks'
Audience by product	Product or service
Required for all branches	Information Security and Data Protection Anti-Money Laundering and Counter Terrorist Financing Awareness Mails Compliance Mails Prohibited and Restricted
Only branches that transact these products and services	Financial Services Insurances
Directly Managed Branches	Anti-bribery and Corruption
Drop & Collect branches	Complete a single compliance module covering all required areas once a year

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13. Refresher: Mails Toolkit

Learning aim:

To provide a collection of learning material that focus on mails, to help branches to get things right first time for our customers.

Note: In autumn 2023 it will also include videos and supporting material from the annual mails workshop.

Audience:

- All Branch Managers and branch assistants

Learning assigned by: How

Self-assign	The toolkit is available to view as and when required
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Learning assigned by: How

Download	Download soft copy PDFs
----------	-------------------------

Location Detail

Online: Branch Hub	BranchHub.postoffice.co.uk/bh - go to 'Training', 'Mails Toolkit'
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Toolkit content

Videos	Why the Prohibited & Restricted process matters
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Annual Workshop support documents	Available autumn 2023
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Annual Workshop Videos	Available autumn 2023
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14. Refresher: Mails Segregation Toolkit

Learning aim:

To explain some of the key issues on mails segregation and help branches to get it right every time for our customers.

Please note: This learning material is produced by the NFSP Mails Support team who work with branches to improve mails segregation in the network.

Audience:

All Branch Managers and branch assistants

Learning assigned by:	How
Self-assign	Learning website users can self-assign the course
Download	Download soft copy PDFs
Location	Detail
Online: NFSP website	www.nfsp.org.uk – Go to the Members Area – Note: only NFSP members can access this part of the website
Online: Branch Hub	BranchHub.postoffice.co.uk/bh - go to 'Training', 'Mails Segregation Toolkit'
Online: Learning website	postoffice.learning.uk.com – search for 'mails segregation'
Course	Content
PDF Documents	Franked meter mail Large Letter Bag guide Reducing Letter-Large letter bag errors How to segregate 1 st and 2 nd Class parcels correctly Top tips and best practice
Videos	How to tie a mail bag correctly Measuring a large letter Correctly measuring Royal Mail and Parcelforce items How to identify and segregate Franked/meter letters Uncommon 1 st class parcel labels Letter/Large Letter mail bag errors
Further help	Detail
Contact the NFSP Mails Support team	GRO

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15. Refresher: Travel Toolkit

Learning aim:

To provide a collection of learning material that focuses on Travel Money products, to help branches maximise the sales opportunities in branch. Also includes videos and supporting material for the annual travel workshop.

This learning material is created by First Rate Exchange Services (FRES) in partnership with Post Office

Audience:

- All Branch Managers and branch assistants who complete Travel Money conversations and transactions

Learning assigned by: How

Self-assign The toolkit is available to view as and when required

Learning assigned by: How

Download Download soft copy PDFs

Location Detail

Online: Branch Hub BranchHub.postoffice.co.uk/bh - go to 'Training', 'Travel Toolkit'

Toolkit content

Talking Travel	Cross selling opportunities Pre-order process on Horizon Retail Standards Post Office Travel Money Card (sale & top-up) 'Holiday chat' travel conversation Daily & weekly up-sell tracker
Annual Workshop support documents	Travel Toolkit Deal of the Day PL5608 Instruction Leaflet Travel Workshop TMC quiz Travel Workshop TMC quiz answers Bureau Sales Tracker Travel workshop learner journal
Annual Workshop Videos	Attracting Customers Growing your business Travel Money Card Measuring Success

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16. Online learning system: Self-registration

Introduction:

If you don't have an account on our Online Learning system you can self-register on the website. You'll then be able to self-assign any of the eLearning modules and the learning documents listed in this catalogue.

Note: For new Branch Managers and assistants going through the onboarding learner journey you don't need to self-register. We'll ask for the details of the individual learners and create the learner accounts and assign the online learning.

Audience:

Anyone who would like to complete the eLearning modules, 'How to' videos or download the learning documents such as the Distance Learning Packs

Self-registration	What you need to obtain an account
	A unique email address Your 4-digit Smart ID Your 6-digit branch code and branch name
How to register	Go to the website: postoffice.learning.uk.com Click: Create New Account button Complete the form – make sure you complete all the mandatory fields shown with a red asterisk*. Note: We recommend you use your email address as your username Answer the question: 'Do you want us to automatically assign the complete training for your Post Office?' Select: 'Yes' if you'd like us to assign the full eLearning programme(s) to you based on your branch type. For example, if you're working in a Local branch we'll assign the Basic Transactions eLearning programme (see page 6 for details) Select: 'No' if you'd like to just self-assign the individual eLearning modules Click: Request Account
What happens next	We'll send you an email Click: on the link in the email to verify your email account We'll review and validate your account request You'll receive an email when your account is approved. You can now log-in and start your learning Having issues getting an account? Please email: GRO

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17. Online learning system: Help

Learning aim:

To help new learners understand how the Online Learning System works.

Audience:

Anyone who has an online learning system account

Where to find help

Online: Learning website	postoffice.learning.uk.com On the Home page, click the 'Need help navigating the system?' tile
How to Videos	Topic
Desktop / Laptop users Mobile users	Dashboard tour Login tour How to find and self-enrol on learning Help completing a course – Part 1 Learning content Help completing a course – Part 2 Quiz content
Further help	Topic
Click 'Help' on the menu bar	Frequently Asked Questions (FAQs) Help completing a module Contact us

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18. Summary of all available training

eLearning modules available to self-assign

For the onboarding of new Branch Managers and their teams the full programmes are assigned by Post Office.

For learners who want to refresh their learning or look at a new topic, each eLearning module is available to self-assign on the Online Learning System. The eLearning modules are:

Product Type:	Module Name:	Approx mins	Product Type:	Module Name:	Approx mins
Mails	Mails Basics	30	Banking and Payment Services	Banking Services	30
	Royal Mail: Inland Mail	45		PES: i-movo voucher service	15
	Parcelforce: Inland Services	30		Automated Payments (Bill Payment)	20
	Royal Mail: Collections and Returns	20		Postal Orders	20
	Royal Mail: International Mail	30		ATM	45
	Inland Mail: Redirection Services	20		Teller Cash Recycler	20
	Parcelforce Worldwide: International Services	30		Compliance: Money	Anti-Money Laundering and Terrorist Financing
Compliance: Mails	Mails	45		Travel Money Services	25
	Prohibited & Restricted	45		Travel Insurance	30
Money Transfer Services	MoneyGram	20		Passport Services	25
	Western Union	20	Financial Services	Savings	30
DVLA	Driving Licence	10		Car and Home Insurance	30
	Vehicle registration	10		Life Products	30
	Taxing a Vehicle	10		Compliance: Financial Services	Financial Services
Lottery	Camelot Lottery	30		Insurances	30
Security	Physical security	25	Other	Vulnerable Customers	30
Compliance: Security	Information Security and Data Protection	45		Modern Slavery and Human Trafficking	30
Branch Accounting	Monthly Branch Balancing	30			

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Summary of what learning is available by product, service or process

Product, Service or Process	eLearning	Classroom	Operational Training Guide	Work Aid	Distance Learning Pack	Compliance workbook	How to Video
Anti-Money Laundering - Compliance	✓					✓	
ATM	✓			✓			✓
Automated Payments	✓	✓	✓				
Banking Services	✓	✓	✓		✓		
Camelot Lottery	✓			✓			
Car and Home Insurance	✓				✓		
Cash & Stock Management		✓	✓				
Customer Experience University / Customer Service		✓			✓		
Customer Referrals		✓	✓		✓		
Daily, Weekly and Monthly balancing	✓	✓	✓				
DVLA: Licences, Register a vehicle, Tax a vehicle	✓	✓	✓		✓		
Financial Services - Compliance	✓					✓	
Payment Exception Service: i-movo voucher service	✓		✓				
Information Security & Data Protection, PCI DSS Audit	✓				✓	✓	
Insurances - Compliance	✓					✓	
Investigating Discrepancies		✓		✓			
Life Products	✓				✓		
Modern Slavery	✓						
Money Transfer Services (MoneyGram/Western Union)	✓		✓		✓		
Passport Services	✓	✓	✓		✓		
Paystation							✓
Physical Security	✓	✓	✓				
Postal Orders	✓		✓				✓
Remittances		✓		✓			✓
Royal Mail: Inland Mail	✓	✓	✓		✓	✓	✓
Royal Mail: International Mail	✓	✓	✓		✓	✓	✓
Savings Products	✓				✓		
Tablet: DVLA, Passport, SIA				✓			
Teller Cash Recycler	✓						
Travel Insurance	✓				✓		
Travel Money Services	✓	✓	✓		✓		
Vulnerable Customers	✓				✓		

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19. Glossary

Term	Meaning
Assistant	Someone who is employed by a Branch Manager or Postmaster to work in a Post Office branch.
Banking Hub Operator	Person under contract to Post Office to operate a Banking Hub branch.
Branch Manager	In this document we use the term Branch Manager to mean a Branch Manager, Postmaster, the person in charge of running a Post Office branch or the person employed by a Strategic Partner to manage a Post Office branch.
Customer Experience University	Customer Experience University offers foundation and advanced level customer experience training ideally completed within the first six months of starting work in a branch.
Directly Managed Branch	A Directly Managed Branch is a branch operated by Post Office Limited using directly employed people. It offers the full range of Post Office products and services.
Download	Means that the learning material is available in an electronic format (PDF) to download onto your own device. The specific websites are shown in this document.
FRES	First Rate Exchange Services. They are the supplier of foreign currency to Post Office customers.
Internal	The contents of this document are classified Post Office INTERNAL. Disclosing, copying, distributing the information contained within this document to any third-party not working on behalf of Post Office and for the purpose intended, is not permitted.
Local	Branch operated under contract to Post Office by a Strategic Partner, Branch Manager or Postmaster which offers a reduced range of Post Office products and services.
Main	Branch operated under contract to Post Office by a Strategic Partner, Branch Manager or Postmaster which offers a full range of Post Office products and services.
NFSP	National Federation of Sub-Postmasters.
Postmaster	Person under contract to Post Office to operate a branch. This could be an individual or a Strategic Partner.
Self-assign	This means an existing learner can log onto the learning website, search for the learning module by name and then assign it to their own learning plan.
Strategic Partner	Company that has a contract with the Post Office and operates 25+ post office branches and has centralised support functions/head office management.

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