



Postmaster

New Branch IT (NBIT) Engagement

**Postmaster Engagement Team
Business Transformation**

Last updated: 24 May 2024
Next update: 30th June 2024
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1. Document Purpose

This document has been created by the Postmaster Engagement Team, within the New Branch IT (NBIT) Programme.

This document aims to introduce the reader to the Postmaster community and set out NBIT engagement delivered to date with this audience. This document is intended to be a “live” record of Postmaster engagement and will be updated monthly to reflect recent activity.

2. Introduction to Postmaster community

Our Postmaster community is made up of c9500 independent business owners who operate a majority number of Post Office branches across the UK, delivering c74% of Post Office overall income. Postmaster branches operate on a franchise partnership basis and remuneration paid is (usually) directly related to the daily transactions carried out in branch, according to transaction and branch model type.

Postmaster branches are made up of 3 model types:

Mains: Our largest branches, where Post Office remuneration is expected to be the main source of income for the operator, with the retail offer (in most cases) supplementing this. Mains branches usually offer a full range of Post Office products and services, including transactions that can take a significant amount of time to complete. As a result, operators are paid a rate of remuneration that reflects the additional staff (and other) costs related to operating this branch model type.

Local/Local+: The majority of Postmaster branches operate under this model type. The operator’s retail business is usually the main source of income, and they operate a 1 or 2 position Post Office along-side their retail point of sale. In a Local model branch, this Post Office and retail may be manned by just 1 person at a time. The Post Office supplements the primary business through driving increased footfall and an extra source of income. There is a reduced product offer in these branches with shorter, simpler transactions such as Mails and Banking making up many daily transactions. Some branches also provide limited on-demand travel services such as Euro & Dollar sales. Remuneration rates reflect lower operating costs.

Traditional: There is a mix of traditional model branches that operate under legacy contract types. These vary in nature across the Network, with many branches in receipt of fixed payments of different types. These branches may offer some of the services offered by a Mains model branch, although they are likely to fall under the Local Model category if the contract were to change. Some of these are hard to place (there is no alternative retailer in the area). Others are branches that are required to meet Post Office access requirements and many operate outreach services in rural locations across the UK*.

*All model types may offer additional outreach or mobile Post Office services to some of the most rural and hard to reach locations across the UK.

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2.1 Communication & ways of working with Postmaster's

Head Office – Postmasters receive a weekly email from Martin Roberts – Group Chief Retail Officer, updating them on key business priorities relating to our business. The email contains links to other sources of information and includes recognition for Postmasters in the community and across the Network. This email also includes a commercial business update showing Week on Week and Year on Year trends, particularly in core products such as Mails, Banking and Travel. All Postmasters have access to Branch Hub, an on-line platform where they, and their teams, can access information and operational updates relating directly to their branch.

Branch Level – Each Postmaster has a dedicated Area Manager or (in the case of new Postmasters) Business Support Manager to provide support and guidance to them in all aspects of operating their Post Office business. This can include, but is not restricted to, support to achieve contractual obligations, maximise sales & remuneration or make savings on operational costs. There are 12 Regions across the UK, each headed up by a Regional Manager. Most Area Managers have c100 branches, although some have significantly more or less than this. Business Support Managers support 10 – 15 Postmasters through the first 6 months of their Post Office journey, before being handed over to the Area Manager for on-going support.

2.2 Post Office operating system “Horizon”

The current IT operating system “Horizon” is the system used in all Postmaster Branches, and is accessed using an individual Smart ID. All branch staff are vetted prior to being issued with a Smart ID and these must not be shared between team members. However, there is nothing currently in place to prevent this from happening. NBIT will introduce MFA (Multi Factor Authentication) to daily log in and therefore should provide a higher level of protection to individual operators of the system.

3. Retail Team

The Retail team within POL (Post Office Limited) holds and manages the overall relationship with Postmasters. There are 2 main strands* to this team, both of whom have direct and/or face to face engagement with Postmasters. At the time of writing a 3rd strand is being set up, Retail Transformation Programme (RTP) who will engage directly with Postmasters in the training and deployment of NBIT.

Group Chief Retail Officer	
Retail Operations Director	Retail Engagement Director
Retail Director	Head of Training Delivery
Head of Retail Operations	Head of Postmaster Engagement (BAU)
12 x Regional Managers	Postmaster Engagement Manager
96 x Area Managers	Head of Postmaster Onboarding
20 x Business Support Managers	16 Onsite & Classroom Trainers

*There are other internal teams who in-directly support Postmasters and their teams

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4. NBIT engagement with Postmasters

NBIT engagement with Postmasters began in early 2021 with Nick Beal and Sarah Gallagher. Naomi Yonas joined the team as Comms and Engagement Associate in May 2021. Sally Wilson joined the team on 1st June 2022 as Postmaster Strategy and Engagement Lead. The team has grown since then and there has been a significant amount of engagement with Postmasters, who's feedback, ideas and critique have helped inform the design, build, testing, training, and deployment strategy for NBIT. Due to the recent formation of the Retail Transformation Programme*, engagement is currently (June 2023) limited to the technical elements of NBIT – design, build & testing including the deployment of release 2 piloting to Postmaster branches. However, our team aim is to engage face to face with Postmasters to demonstrate the system from Release 2.

*RTP is currently (Sept 2023) being formally dissolved and incorporated back into SPM Programme

2023 Postmaster Engagement Team

Postmaster Assurance Director Nick Beal (to 10/5/24)	
Business Engagement & Readiness Lead Neil Drake (13/5/24)	
Postmaster Strategy & Engagement Lead Sally Wilson (June 2022)	
Postmaster Engagement Specialist Joe Francis (Apr 2023)	Postmaster Engagement Associate Naomi Yonas (May 2021 to Aug 2023)
P/master Eng. Demonstrator & Tester Dipti Patel (April 2023)	P/master Eng. Demonstrator & Tester Jamal Rashid (Apr 2023)
P/master Eng. Team Support Caroline Hatchman (Apr 2023 to Jan 2024)	P/master Eng. Demonstrator & Tester Jo Gaine (Sept 2022 to Feb 2023)
Session Event & Demo Co-ordinator Benna Ntikala (May 2024)	

4.1 Postmaster IT working group

The Postmaster IT Working Group was started by Sarah Gallagher in collaboration with the Horizon Improvements Postmaster Experience Team. Naomi Yonas has managed the NBIT element of the working group sessions since June 2021 and Sally Wilson has led on the working group strategy since joining the team on 1st June 2022. NBIT sessions are held independently of the Horizon Improvements team sessions, although some Postmasters take part in both.

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The working group consists of 304 Postmasters and small number of Officers in Charge (OIC). 55% of Postmasters in the working group have attended a session and 45 attend on a regular basis (more than 5 times).

The purpose of the working group engagement from the NBIT Programme perspective is to ensure that Postmasters can inform the design and build decisions from the earliest stages in its development covering a wide range of operational, technical, and training practices.

From the Postmaster perspective this enables them to feel that they have been empowered to be involved in the Programme and that their views and opinions have been sought, listened to, and considered during the various stages of design, build and testing of the new system.

The engagement sessions are hosted by subject matter experts within the NBIT Programme team and facilitated by 2 representatives from the Postmaster Engagement team. Attendance at the working group sessions is entirely voluntary for Postmasters and no remuneration is paid for their time contribution.

*Sessions paused due to organisational restructure & Programme changes (Aug '23). Sessions restart Nov '23/Jan '24

4.2 Postmaster Working Group Sessions

Date	Workstream	Topic	Slide Deck Link	Link to Recording	Summary Link
24/08/21	BAFTA	Cash Management	<u>Yes</u>	No	No
26/08/21	BAFTA	Cash Management	<u>Yes</u>	No	No
02/09/21	Devices	Future Devices	<u>Yes</u>	No	No
30/09/21	Product/Comms	Mails operations/ SPM (Strategic Platform Modernisation) Comms approach	<u>Yes</u>	No	No
12/10/21	BAFTA	Stock Management	<u>Yes</u>	<u>Yes</u>	No
19/10/21	Branch Hub	Brunch Hub			No
28/10/21	Migration / Support	Deployment sequence / Support approach	<u>Yes</u>	<u>Yes</u>	No
11/11/21	User Management	Issues and Solutions	<u>Yes</u>	<u>Yes</u>	<u>Yes</u>
25/11/21	BAFTA	Branch discrepancy accounts	<u>Yes</u>	<u>Yes</u>	<u>Yes</u>
13/01/22	User Management	Joiners, Movers, and Leavers	<u>Yes</u>	<u>Yes</u>	<u>Yes</u>
20/01/22	T&I/Banking	Training Strategy & First banking Journey	<u>Yes</u>	<u>Yes</u>	No
15/02/22	Banking	Banking Journey	<u>Yes</u>	<u>Yes</u>	<u>Yes</u>
22/02/22	User Management	End to End Proposal	<u>Yes</u>	<u>Yes</u>	<u>Yes</u>
03/03/22	BAFTA	Basket Processing	<u>Yes</u>	R/A	<u>Yes</u>

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17/03/22	Devices	Counter Printers	<u>Yes</u>	<u>Yes</u>	No
22/03/22	Product/ Branch Hub	Banking Journey's & Branch Hub	N/A	<u>Yes</u>	No
29/03/22	BAFTA	Cash Management	<u>Yes</u>		No
28/04/22	BAFTA	Stock Management	<u>Yes</u>	<u>Yes</u>	<u>Yes</u>
05/05/22	Branch Hub	Web Chat	<u>Yes</u>	<u>Yes</u>	<u>Yes</u>
10/05/22	BAFTA	Discrepancy Accounts	<u>Yes</u>	<u>Yes</u>	<u>Yes</u>
07/06/22	BAFTA	Payment Processing	<u>Yes</u>	<u>Yes</u>	<u>Yes</u>
21/06/22	BAFTA	Stock Units (reused slides)	<u>Yes</u>	<u>Yes</u>	No
03/08/22	Product	+50 Sale, Lead Gen, and Travel Insurance	<u>Yes</u>	<u>Yes</u>	No
16/08/22	Branch Reporting	Branch Reports	<u>Yes</u>	<u>Yes</u>	No
27/10/22	Product	Postal Orders	<u>Yes</u>	<u>Yes</u>	No
27/10/22	Product	Postal Orders	<u>Yes</u>	<u>Yes</u>	No
01/11/22	Outreach	Outreach	<u>Yes</u>	<u>Yes</u>	No
25/01/23	UX	Intro to Unmoderated Useability testing:			No
		Session 1 Part 1	<u>Yes</u>	<u>Yes</u>	<u>Yes</u>
		Session 1 Part 2	<u>Yes</u>	<u>Yes</u>	Yes
		Session 2 Part 1	<u>Yes</u>	<u>Yes</u>	<u>Yes</u>
		Session 2 Part 2	<u>Yes</u>	<u>Yes</u>	Yes
16/02/23	BAFTA	NBIT Menu Layout	<u>Yes</u>	<u>Yes</u>	<u>Yes</u>
07/03/23	Devices	Outreach Device Proposals	<u>Yes</u>	<u>Yes</u>	<u>Yes</u>
16/03/23	Devices	2 nd Device - Bill Payment/Pre-pay Card	<u>Yes</u>	<u>Yes</u>	No
27/04/23	BAFTA	Event Log	<u>Yes</u>	<u>Yes</u>	<u>Yes</u>
01/11/23	Counter Terminal Product	Payment Tendering Screens	No	<u>Yes</u>	No
01/11/23	Counter Terminal Product	Payment Tendering Screens	No	<u>Yes</u>	No

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4.3 Training & Information working group

Within the Postmaster IT working group, there is a dedicated group of 22 Postmasters who attend dedicated Training & Information (T&I) working group sessions, which normally take place monthly*. These sessions are intended to be progressive, building an overall understanding of the training & information offer, seeking input to the design and build. In addition, the group are involved in validation of current thinking and ideas around Training and Information and, at times volunteer for test and pilot.

In June 2023, we sought to grow the size of the current T&I working group to ensure that freshpoints of view were considered and plan to continue this to add a total of around 10 new members to this group (from the main Postmaster IT working group). We also issued a calendar of forthcoming session topics*.

*Sessions paused from August 2023 due to organisational restructure and Programme changes.

*Re-started November 2023

4.4 T&I working group sessions

Date	Session	Topic	Recording
8/08/22 10/08/22	T&I 1	Introduction to NBIT training team, purpose of T&I working group + overview of T&I strategy	<u>Yes</u> <u>Yes</u>
12/09/22 14/09/22	T&I 2	Learning Management System (LMS)	<u>Yes</u> <u>Yes</u>
10/10/22 12/10/22	T&I 3	Virtual Training	<u>Yes</u> <u>Yes</u>
06/02/23 08/02/23	T&I 4	NBIT Help & Information	<u>Yes</u> <u>Yes</u>
06/03/23 (combined)	T&I 5	Training Design Approach	<u>Yes</u>
17/4/23 (combined)	T&I 6	Training Evaluation	<u>Yes</u>
12/06/23 14/06/23	T&I 7	NBIT Help, Categorisation & Tone of Voice	<u>Yes</u> <u>Yes</u>
21/07/23	LMS Pilot	See section 9	N/A
14/08/23	On-line Survey	Horizon Help Function – T&I Benchmark	N/A

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15/01/24 16/01/24 17/01/24	T&I 8	Update on Training Evaluation - Aldwych & St Johns + ideas for future sessions	<u>Yes</u> <u>Yes</u> <u>Yes</u>
13/03/24 14/03/24	T & I 9	Mail journey's – Demo and validate conversion training approach	<u>Yes</u> <u>Yes</u>

This document logs any questions asked during working group sessions, that are not answered during the session.

Q&A Log

4.5 Working group 121 engagement sessions

Occasionally, as new team members join the Postmaster Engagement Team, ad hoc 121 engagement sessions are held with Postmasters from the working group. These are welcome/introductory discussion sessions which are not recorded. However, a brief record of the discussion is noted along with documentation of any questions that have been asked. Suggestions and feedback that pertains specifically to the working group sessions is noted. These suggestions are considered for change and/or improvement if deemed both advantageous to the group and feasible to implement.

Date	Session	Recording
July 2022	<u>Intro session attendees .xlsx</u>	No

5 NFSP Engagement

Monthly meetings are held with the NFSP Network Engagement Team (NET) facilitated by the BAU (Business as Usual) Postmaster Engagement Team. There is normally a 1-hour slot scheduled at this meeting for NBIT updates. These updates are given by either Nick Beal and/or Sally Wilson, with ad-hoc support from other Programme workstreams i.e., a representative of the training team. These meetings are documented by BAU Postmaster Engagement Team. In addition, NFSP members are invited to the regular working group sessions if they have volunteered to be members of the Postmaster IT working group.

On 31st January 2023, a dedicated update for the NFSP NET team was held in Finsbury Dials in collaboration with the BAU Postmaster Engagement Team. This session was also attended by the Postmaster Director, Hithendra Cheetirala. The session was scheduled for 9:45 am to 3:15pm and included presentations from a range of NBIT Programme Workstreams. It also included a short demonstration of NBIT and allowed NFSP board members to view all the hardware and devices. Meeting notes were documented by the BAU Postmaster Engagement Team.

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Members of the Postmaster Engagement Team may also be invited to attend Regional NFSP meetings or Conferences to provide updates on NBIT. These can be either virtual or face to face. *

*In April 2023 RTP requested a pause to all NBIT updates with NFSP; this pause ended in January 2024 and engagement re-started thereafter

Date	Topic	Slides	Video	Summary Notes
31/01/23	Update from all pillars Q & A Equipment & devices demo	<u>NFSP Engagement MASTER V3.pptx</u>	No	<u>NFSP face-face meeting - NBIT workshop 310123.docx</u>
4/4/23	Overview of UX design testing & design decisions – Sally Wilson	<u>NFSP Update 040423 V1.pptx</u>	No	No
9/01/24	Update on Pilots/Postmaster Engagement – Sally Wilson	N/A	No	<u>NFSP - update 090124(SW).pdf</u>
6/2/24	Face to Face event planning & update	<u>NFSP NET 060224.pdf</u>	No	Notes on slides
9/4/24	Mobile Demonstration pilot and Agenda for F2F event	<u>25042024 NFSP NET</u>	No	<u>NFSP Notes 090424.docx</u>
12/5/24	NFSP Conference attendance/Demo	Add link	No	No

Network Engagement Team contacts:
 Shaun.kerrison GRO or Anoop.talluri GRO

6 Foolproof Design Principles Focus Group

By September 2021 a prototype for the new counter system had already started being built, but keen to ensure that any ongoing development was done with the end user at the heart, Foolproof were brought in to run a rapid discovery phase with several goals:

- To ascertain the breadth of the 'pain points' and 'moments of truth' faced by postmasters/clerks within the existing Horizon Solution
- Plot these across the Service to understand how and when these occur, hypothesising over how they can be improved
- Create a set of design principles (based on the research findings) for the NBIT programme to follow for all ongoing development
- Create mock-ups of the design principles in action for a selection of journeys, showing how they could improve the experience
- Lastly, create a visual

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- I design library for development to use for ongoing development.

Foolproof Experience Design Discovery			
Date	Video	Date	Video
17/09/21	No	02/11/21	No
17/09/21	No	02/11/21	No
20/09/21	No	04/11/21	No
21/09/21	No	04/11/21	No
22/09/21	No	05/11/21	No

[Foolproof Experience Design Documentation.pdf](#)

7 User Experience (UX) Testing

In January 2023, the Postmaster Engagement Team began facilitating User Experience (UX) testing in collaboration with the UX design team led by Nikki Saveker. The team work closely with Jack Riley who plans, conducts, and synthesises each study to help inform design decisions. Initial feedback was sought from 2 Postmasters in the Nottingham Area, by Joanna Gaine. These were postmasters that she knew well, having worked directly for them in the past and they provided initial feedback which helped us to formulate the appropriate style, layout, language that should be used as well as identifying an appropriate length for both types of survey.

*Update: UX testing with Postmasters ended on 31st August 2023 due to Programme budget constraints.

UX testing scheduled to re-start July 2024 (tbc) in line with mobile demo pilot 2

7.1 Unmoderated usability testing

We launch a study every 3 weeks with the aim of quickly testing NBIT designs with users. We use our network of NBIT Champions and the Optimal Workshop testing platform to deploy the unmoderated usability tests at pace. The results of these tests are anonymous, and results are fed back to the US design team directly via the testing platform. The results are then synthesised by Jack and a report produced.

These tests help us to understand Postmaster wants, needs and expectations in relation to NBIT designs.

In August 2023, we increased activity to include Information Architecture tree testing. Information architecture (IA) defines how information is organised and structured throughout the system. Good IA aims to ensure that users are easily able to find what they're looking for without getting lost as they navigate around the system. The first tree test (sprint 9) allowed us to identify that further work was needed and we decided to carry out further testing (sprint 10 a & b) to clarify some of the results*.

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Unmoderated useability studies to date:

Useability Studies	View Study	Insights Report	Restricted access
Pilot	N/A	Dec 2022 (pilot) insights report	Yes
Sprint 1	S1 Study	Jan 2023 Insights Report.pdf	Yes
Sprint 2	S2 Study	Feb 2023 insights report.pdf	Yes
Sprint 3 (Strategic Partner)	S3 Study	March 2023 insights report.pdf	Yes
Sprint 4	S4 Study	April 2023 insights report.pdf	Yes
Sprint 5	S5 Study	May 2023 insights report.pdf	Yes
Sprint 6	S6 Study	Jun 2023 insights report.pdf	Yes
Sprint 7 (Strategic Partner)	S7 Study	Jul 2023 insights report.pptx	Yes
Ad-hoc Useability Study - Sense Check – July 2023	N/A	UX Writing - Postmaster Sense Check.pdf	Yes
Sprint 8		Aug 2023 insights report.pptx	Yes
Sprint 9	Sprint 9 Study (AI Tree Test)	Aug 2023 IA report.pptx	Yes
Sprint 10(a)	Sprint 10(a) Study (AI Tree Test)	No report – project ended	N/A
Sprint 10(b)	Sprint 10(b) Study (AI Tree Test)	No report – project ended	N/A

7.2 121 Postmaster User Experience Testing

121 Postmaster interviews – Jack Riley – Various Topics

We conduct in-depth interviews every 6 weeks with Postmasters from the IT working group (initially) Postmasters are contacted by the Postmaster Engagement Team in advance to book a session slot and the sessions take place via Microsoft Teams. Each session lasts around 45 minutes and is facilitated and recorded by a member of the Postmaster Engagement team. The interview questioning is conducted by Jack Reilly. Postmaster responses allow Jack to gather in-depth qualitative feedback in a moderated and contextual environment. The optimum number of interviews per sprint is usually around 8. The results are synthesised before a report is produced documenting and prioritising the results and design decisions made pertaining to that sprint.

These tests help us to understand Postmaster behaviour and preferences to inform strategic decision making.

Postmaster 121 Interviews UX Design Team	Study recordings & report	Restricted access
Sprint 1	121 Interview sessions Feb 2023	Yes

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Sprint 2	<u>121 Interview sessions April 2023</u>	Yes
Sprint 3	<u>121 Interview sessions May 2023</u>	Yes

121 Postmaster Interviews – Postmaster Engagement Team – Homepage Categorisation

In June 2023, the Postmaster Engagement team conducted 121 sessions with 20 Postmasters to give feedback on the preferred top line categorisation of the NBIT Homepage. During these sessions we asked Postmasters which categories they would like to see on the Homepage, and which products should be accessible via a quick link from the Homepage. We wanted to see if there were clearly identifiable preferences or differences of opinion amongst the Postmaster community.

Postmaster 121 Interviews Home Page Categorisation	Study recordings & analysis	Restricted access
June 2023	<u>121 Interview Sessions June 2023</u>	Yes

8 NBIT Pilot branch engagement

NBIT will be piloted in 4/5 phases and is anticipated to include 50 branches of which 30 will be Postmaster operated. Pilot release 1, was launched in 2 to Directly Managed Branches in September/October 2022. Release 2 is scheduled to begin later in 2023. Release 2 will include a phased release of 2.0, followed by 2.1 and 2.2, all expected to be implemented to DMB branches only during Nov/Dec 2023 and early 2024.

As of 1st March 2024 – there are now 5 DMB branches proposed to pilot R2.1 and a record of all comms has been added to the logs below.

8.1 Postmaster pilot branch engagement

At the beginning of 2023, we began the process of compiling a shortlist of branches which may be suitable for piloting NBIT before contacting the Retail team and Postmasters. Postmasters were given an overview of the pilot and offered the opportunity to find out more about taking part. Interested Postmasters were then invited to attend a Microsoft Teams meeting, where find out more, ask questions and listen to the views /questions of other interested Postmasters.

Following this, and once Postmasters confirm that they would like to proceed to the next stage, the deployment team arrange a suitable date and time to visit the branch/Postmaster and carry out a Feasibility Assessment. Where possible, a member of the Postmaster Engagement team attends to help answer any operational questions that may be asked.

Following the assessment Postmasters are advised of the outcome and contact is maintained by the Postmaster Engagement team until the beginning of the deployment lifecycle, in preparation for pilot “go live.”

Logs of selection criteria and all communications can be accessed via these links which will be kept updated until transfer to the deployment team.

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NBIT Pilot - Branch Logs	
R2 (Release 2) Pilot Volunteers - Tranche 1	Feasibility Assessments - Tranche1
R2 (Release 2) Pilot Volunteers - Tranche 2	Feasibility Assessments - Tranche 2
20230202 Information & Question Sessions	20230615 2pm R2 Question Summary
20230615 Information & Questions session	20230615 7pm R2 Question Summary
Feasibility Report Summary all branches.xlsx	Postmaster Pilot Branch Communications (from Oct '23)

8.2 DMB pilot branch engagement

From September 2023 the Postmaster Engagement team took ownership of engagement with the 2 Release 1 DMB pilot branches, Aldwych in London and St John's in Leeds, in preparation for Release 2.0. From October 2023 engaged with each branch on a weekly basis, with a scheduled call on a Thursday morning. A follow up email is sent to branch on a Friday. We subsequently began engagement with a further 3 DMB branches, in preparation for R2.1 From April 2024, we merged all branches into 1 weekly call

NBIT Pilot – DMB branch engagement logs	
Aldwych Communications Log	Leeds Communication Log
High St Croydon	St Johns DMB Visit- 19th October.docx
Melville Road	DMB Pilot 5 Branch Update.xlsx
Springburn Way	

8.3 Strategic Partner pilot branch engagement

Changes to the team in autumn 2023 meant that responsibility for Strategic Partner engagement moved to the Postmaster Engagement team. From this point on, the team became known as **The NBIT Engagement Team**.

All pilot engagement with Strategic partners prior to October 2023 is documented here: [Strategic Partner Engagement](#)

NBIT Pilot – Strategic Partner branch engagement logs (from October 2023)	
Co-op branch Feasibility Assessments	

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9 Learning Management System (LMS) Pilot

The Postmaster Engagement Team are facilitating a pilot of the LMS system that will support the training of Postmasters when their branch either pilots or converts to NBIT. Working in collaboration with Postmasters and the NBIT training team, we began the pilot process in early July 2023.

NBIT Learning management System		
Pilot 1	July/August 2023	LMS Pilot 1 Documentation
Pilot 1	Sept 2023	Thingi LMS - Pilot Presentation v1.2.pptx

10 Mobile Demo Activity

In April 2024 we launched a mobile pilot of NBIT demo activity to Postmasters utilising a mobile Post Office van kitted out with an early version of the NBIT system. The purpose of the demo activity is to allow Postmasters to see, feel, touch and use the NBIT system in order to familiarise and provide feedback. The pilot has been supported by communications to internal colleagues and to Postmasters. Following the first pilot, we evaluated the approach and the effectiveness, taking feedback into account and agreed the approach to phase 2 pilot prior to a full roll out, in collaboration with Retail Leadership.

Pilot 2 is currently in planning and scheduled to begin 8th July 2024.

NBIT Mobile Demo				
Pilot 1	9 th April to 8 th May 2024	South Wales & West – Lynn Lewis	Mobile Demo Pilot 1 - Postmaster Feedback	Mobile Demo Pilot 1 - Area Manager Feedback
Pilot 2	8 th July -	East Anglia – Andy Parker		
Demo & Events Log v0.1.xlsx				

11 Demo & Event Attendance

In May 2024 the Engagement Team began attending events to demonstrate NBIT to internal and external stakeholders. Records of all events attended are linked here: [Demo & Events Log v0.1.xlsx](#)

12 Strategic Partner Engagement

Details of Strategic Partner Engagement to October 2023 can be accessed via this link: [Strategic Partner Engagement](#)

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October to May 2024 - informal monthly meetings have taken place with Abigail McGeever, Strategic Partner Director. No decisions have been taken to date re the re-starting of Strategic Partner engagement at either Head Office or Branch level.

13 Ongoing Postmaster engagement

The Postmaster Engagement Team will update this document minimum monthly from July 2023.

During August/September 2023 there is a degree of uncertainty around the future organisational structure of the SPM Programme and all Postmaster Engagement is either paused or stopped until Engagement team and Programme leadership strategy becomes clearer.

January 2024 – Postmaster and Retail Stakeholder engagement re-started

Version History			
Date	Amendments	Changes	Owner
30/10/2023	Section 7 amended to include DMB pilot engagement (7.2)	<ul style="list-style-type: none"> October comms to pilot Postmasters added Postmaster Engagement changed to 7.1 7.2 Weekly engagement with DMB branches added Extension of feasibility assessment to Leeds DMB added 	Sally Wilson
28/11/23	Section 7.2	<ul style="list-style-type: none"> Weekly comms and engagement records to St John's and Aldwych added Courtesy call to pilot Postmaster branches pre-peak record added 	Sally Wilson Joe Francis
18/01/24	Section 3 Section 3.4	<ul style="list-style-type: none"> Changes to team Add ITWG sessions to date 	Sally Wilson
18/01/2024	Section 4	<ul style="list-style-type: none"> NFSP Net Meeting Jan '24 	Sally Wilson
18/01/2024	Section 7.2	<ul style="list-style-type: none"> Pilot Branch comms updated 	Sally Wilson
01/03/2024	Section 7.2	<ul style="list-style-type: none"> Pilot Branch comms added 	Sally Wilson
03/04/2024	Section 7.2	<ul style="list-style-type: none"> Pilot Branch comms added 	Sally Wilson
12/04/2024	Section 9 added	<ul style="list-style-type: none"> Mobile demo Pilot 	Sally Wilson
12/04/2024	Section 10 added	<ul style="list-style-type: none"> Link to Strategic Partner Engagement added 	Sally Wilson
24/05/2024	Section 9 amended	<ul style="list-style-type: none"> Update to mobile demo pilot 1 	Sally Wilson
24/05/2024	Section 11 added	<ul style="list-style-type: none"> Demo & Event attendance section added 	Sally Wilson
26/05/2024	Section 8.3 added	<ul style="list-style-type: none"> Strategic Partner pilots 	Sally Wilson

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