Contract Advisor – Induction & Training

Version 2.0

Version	Classification	Description	Author	Date	Status
V2.0	Confidential	Contract Advisor - Induction & Training Plan	David Southall	03APR24	Final

Contract Advisor – Induction & Training Programme

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1. Introduction

The role of the Contract Advisor is to manage a postmaster against their contractual obligations across those branches in the Postmaster network (not DMB or Strategic Partners). The role is required to understand of the postmaster contract(s) working with the wider Retail Team the Contract Advisor helps postmasters deliver high performance standards and, where necessary, they deploy procedures to manage and resolve contractual breaches to help meet these standards.

The nature of the role means that they are responsible for reviewing matters that may, in due course, lead to the termination of a postmaster's contract. It is important then that the proper training is given so any new member of the team fully understands the policies behind the decisions being taken and the processes to follow.

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2. Pre-Start Checks

Prior to the new starter the following needs to be arranged:

• Laptop, with log on and email address

• Mobile phone

Once an email has been provided the access to the following resource is needed:

Name	
Dynamics	
Policy Database	
Periscope	
NOMAD	
Knowledge Centre	
Retail Toolkit	
Cloud City	
Puzzel	
The Hub	
Quatrix	

If the new starter has no previous Post Office experience, then arrangements will be made for them to complete Post Office Discovery Day event on Success Factors.

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3. Day One

Meeting between the Head of Contract Management & Deployment (HoCM&D) and new starter

Key Information/Overview

Business Overview		
The Hub	Central Hub for all business needs and support – found here • Employee Assist • WOW • Equity, Diversity & Inclusion • Horizon Inquiry and IT Scandal	Review content
Training Development & Support	Learning & Development (sharepoint.com) provides an overview of the learning and development support available. To be reviewed and discussed with the HoCM&D	Review content, understand any learning and development needs
Wood Street Overview (if applicable)	Contracts Team - Training - Post Office Workspace Guide (Apr 24 update).pdf - All Documents (sharepoint.com) provides an overview of the workspace in Wood Street	Undertake tour of Wood Street
Discovery Day	Discovery day in Wood Street or Chesterfield, facilitated by the Learning & Development Team. Includes compliance and Health & Safety courses,	Attend discovery day
Team		
Contract Team – Introduction	**This** provides an overview of the Contracts Team and the three key policies the team work to. Process Maps (work in process) Postmaster Support Policies (sharepoint.com)	HoCM&D to present
Team Basics	Team meetings 121 meetings and quarterly reviews Weekly 'sit down' calls Contract Advisor objectives Cost Centre code – 116208 Use of calendar Booking travel - Travel and Events Booking Portal (sharepoint.com); Travel Policy	HoCM&D to run through
Performance Overview	This sets out the performance review process and what is looked for at year end (April - March)	HoCM&D to run through

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4. Week One

This week will involve reviewing the postmaster contracts and the policies that underpin the work the contracts team do. Diary time will be put in over the course of the week to review these areas. The new starter will also meet with other Contract Advisors who will provide practical guidance, support and act as a 'buddy' to the new starter and across the course of this week onwards will spend time reviewing live examples of cases and understand how information is recorded.

4.1. Introduction to the Postmaster Contract Types

Head of Contract Management & Deployment

To provide an overview of postmaster contract types, a background to the common issues judgement and the effect of the judgment on postmaster contracts. To include the following:

- Background to restatement.
- Review of Subpostmaster Contract (SPMC)
- Review of Main Agreement
- Review of Local Agreement
- Review historic contract list

To have an understanding of the postmaster contract types, differences across agreements and the impact of the Common Issues Judgement. This to be supplemented by the 'Horizon IT Scandal – guidance for colleagues'.

Summary of contract restatement	Contracts Team - Training - contract-restatement-summary.pdf - All Documents (sharepoint.com)
Horizon IT Scandal – guidance for colleagues	Horizon IT Scandal - guidance for colleagues (sharepoint.com)
Subpostmaster Contract (SPMC)	Contracts Team - Training - Clean - SPMC - updated on 140720.pdf - All Documents (sharepoint.com)
Local Agreement	Contracts Team - Training - Clean - Local NTC - updated on 140720.pdf - All Documents (sharepoint.com)
Main Agreement	Contracts Team - Training - Clean - Main NTC - updated on 140720.pdf - All Documents (sharepoint.com)
Historic Contract List	Historic Contract List.docx (sharepoint.com)

4.2. Team Document Library & Decision Rationale

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A review of the rationale document that is used to support the decision-making processes in the contracts team. This is to understand the basis of how a Contract Advisor undertakes an review of a situation, and considers key factors drawn together into a rationale that sets out a recommended course of action.

A review of the document library, highlighting the documents and pointing out the differences between NT contract documentation and SPMC documentation.

Decision Rationale document	Contract Decision Rationale_V2.1_Local_Main 22MAR24.docx (sharepoint.com) sets out the review and decision making process
Document Library	General
Use of Puzzel and Contact Logs	Contracts Team - Meeting and Puzzel Recordings - Puzzel - Contracts Team Guide_v1.0 09FEB24.pdf - All Documents (sharepoint.com)

4.3. Governance

Head of Contract Management & Deployment

Post Office Ltd has policies governing the management of its contractual agreements with postmasters. These policies explain that, in certain circumstances, there may be situations where Post Office needs to either suspend or terminate a Postmaster's Agreement. To ensure our policies are implemented as fairly as possible, as well providing the proper support to Post Office colleagues who implement the policies, additional governance is in place to support these decisions.

Responsible; **A**ccountable; **C**onsulted; **I**nformed (RACI)	Postmaster Contracts Decision Making RACI v2.2
Termination Decisions – Legal Assurance	Legal Assurance.pptx (sharepoint.com)
Postmaster Suspensions Decision Governance Committee – Overview	Postmaster Suspensions_DGC_Overview_03APR24.pptx (sharepoint.com)
Postmaster Contract Termination Decision Committee	Postmaster Contract Termination Decision Committee_Overview.pptx (sharepoint.com)
Contract Termination Decision Review Panel	

At the end of the week a review will be undertaken between the new starter and Head of Contract Management & Deployment.

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5. Week One/Week Two

Week One/Week Two

The new starter's mentor will spend time reviewing live cases and going through processes at a team level. The following will be included:

Contract Escalations	
What comes from where?	Expectation is that the process to follow when contacted with a performance escalation is understood
When to reassign	
Review of live cases	
Walkthrough of specific example	
Understanding how the details are captured on Dynamics	
Use of Puzzel and Contact Logs	

Team Processes	
Team inbox - review of the type of queries that come into the inbox and how these are managed	Expectation is that how the team inbox and data sites are managed is understood
Teams site - an overview of the Teams site and the documents stored on there.	
Dynamics – overview of how to capture information on Dynamics	
Document Storage – overview as to how to save and link to documents	

Branch Assurance Visit	
How and when a Branch Assurance Advisor will contact a Contract Advisors - the hub - Network Monitoring and Branch Assurance Support Policy V3.2.pdf - All Documents (sharepoint.com)	Expectation is that the process to follow when contacted by a Branch Assurance Advisor is understood
How these are dealt with	

Performance Intervention	
Review of live cases	Expectation is that how to determine what is performance intervention and the process to follow is understood
Walkthrough of specific example	
How to approach a rationale and where to find documentation	
Understanding how the details are captured on Dynamics	
Use of Puzzel and Contact Logs	

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Contract Performance	
Review of live cases	Expectation is that how to determine what is Contract Performance and the process to follow is understood
Walkthrough of specific example	
How to approach a rationale and where to find documentation	
Understanding how the details are captured on Dynamics	
Use of Puzzel and Contact Logs	

Contract Suspension	
Review of live cases	Expectation is that how to determine what is Contract Suspension and the process to follow is understood
Walkthrough of specific example	
How to approach a rationale and where to find documentation	
Understanding how the details are captured on Dynamics	
Use of Puzzel and Contact Logs	

Contract Termination	
Review of live cases	Expectation is that how to determine what is Contract Termination and the process to follow is understood
Walkthrough of specific example	
How to approach a rationale and where to find documentation	
Understanding how the details are captured on Dynamics	
Use of Puzzel and Contact Logs	

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6. Week Three

The new starter will be introduced to their own cases, with support from the wider team, and will contact the Regional Manager(s) for the areas they will cover to introduce themselves and arrange to attend their team meeting(s). Time to be arranged to spend time with an Area Manager and, if possible, attend a branch visit.

In addition to this contact will be made with the following teams all of that have direct involvement with the Contracts Team, to arrange time to understand what they do (list can be varied depending on business experience):

Team
Mailwork Manager/Policy Advisor
Onboarding
Network Monitoring
Network Support & Resolution (Tier 2/Tier 3)
Postmaster Account Support Team
Branch Assurance Team
Training Team
Branch Support Centre
Security
Speak Up
Area Managers
Regional Managers
Financial Crime
Branch Support
Strategic Partners
Assurance & Complex Investigation
Network Provision Team

Ongoing

Ongoing support from the Head of Contract Management & Deployment through 121 meetings and regular reviews as well as support from the mentor and wider team. Should any additional training requirements arise they will be captured in the Induction and Training Programme document (included as an appendix to this document). This will be a live document maintained in the employee's file.

Governance

It is the responsibility of the Head of Contract Management & Deployment to ensure that the induction of a Contract Advisor takes place and accurate records of each activity completed are kept, maintained and stored centrally (see **Appendix 1**).

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7. Points of Contact

Digital Contracts/ Onboarding	supportadvisors **GRO**
Hard copy contracts	chaida.aboobakar **GRO**
Arrange a Branch Assurance Visit	networkmonitoring **GRO** branchassurancesupport **GRO**
Former Postmaster Accounts – Postmaster Account Support Team	formeraccountsupport **GRO**
Current Postmaster Accounts – Postmaster Account Support Team	postmasteraccount **GRO**
Security	post.office.security **GRO**
Remuneration confirmation requests	agent.changes **GRO**
CFS (pay system) Updates	postmaster.changes **GRO**
Postmaster Training	OST.escalations **GRO** trainingscheduling **GRO**
Discrepancy Investigation T2	branchTier2Admin **GRO**
Discrepancy Investigation T3	cir **GRO**
Remuneration queries	postmaster.remuneration.support.team **GRO** **GRO**
Postmaster Expenses	postmaster.services **GRO**
Smart ID	smartID **GRO**
Registered Assistants	postmaster.assistant.vetting **GRO**
Sending letters/ OBC	issue.resolution.team **GRO**
CVIT/ Cash Management	cash.management.support.mail.in **GRO**
Mailwork/Postmaster Policy Queries	steve.utting **GRO**
Estate Manager/ Royal Mail Leases	kevin.parkin **GRO**
Temporary Postmaster Team	temporarypostmaster **GRO**
Historical Shortfall Scheme	historicalshortfallscheme **GRO**
Financial Crime	financial.crime **GRO**
Fit and Proper	fitandproper **GRO**
Information Rights	information.rights **GRO**
Business Plans Finance	businessplansfinance **GRO**

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Network Monitoring	networkmonitoring GRO
Community/Outreach Queries	nigel.parry GRO
Whistleblowing/ Speak Up	speakup GRO
Complex Investigations	triage GRO

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8. Resource Links

NOMAD	Branch overview platform.
Periscope	Central branch information hub
Dynamics	Active case management and document storage platform
Cloud	Old business documentation storage platform
Training	Postmaster training, support, and intervention logs
Puzzel	Platform used to record telephone calls
Puzzel admin	To be able to access and obtain call recordings
Horizon support	Visibility over Horizon support that is accessible in branch
Quatrix	Secure transfer platform
Retail Toolkit	Wider business guidance, policies, and documentation
Onboarding Knowledge Centre	Storage of contracts and conditions
Interventions	Process and documentation for requesting further Postmaster support or interventions
Customer Complaints	External Postmaster or branch complaint logs
Area Manager Logs	Area Manager call and visit logs
Visit Logs	Wider business visit logs
Contracts Landing Page	Old contracts landing page for relevant links and information
Service Portal	To order new software and hardware
Travel Portal	To book business travel and accommodation
WOW	Ways of working recognition platform
The Hub	Business landing page or watercooler
Success Factors	Personal HR platform

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9. Control

Date	Version	Updated by	Change Details
	1.0	David Southall Head of Contract Management & Deployment	
	1.0	David Southall Head of Contract Management & Deployment	
	1.1	David Southall Head of Contract Management & Deployment	
3 April 2024	2.0	David Southall Head of Contract Management & Deployment	Updated version to include governance steps and changes within team processes.

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10. Appendix

Include a copy of the training plan capturing that all areas have been covered (as well as ongoing training).

Name	
Date started	

Pre-start Checks		
Action	**Date Complete**	**Comments**
Laptop, with log on and email address		
Mobile Phone		
Post Office Discovery Day		
Access Required To -		
NOMAD		
Periscope		
Dynamics		
Cloud		
Training		
Puzzel		
Puzzel admin		
Horizon support		
Quatrix		
Retail Toolkit		
Onboarding Knowledge Centre		
Interventions		
Customer Complaints		
Area Manager Logs		
Visit Logs		
Contracts Landing Page		

Day One		
Action	**Date Complete**	**Comments**
The Hub		
Training Development & Support		
Wood Street Overview (if applicable)		
Discovery Day		
Contract Team – Introduction		
Team Basics		

Week One		
Action	**Date Complete**	**Comments**
Introduction to Postmaster contract types		

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Summary of contract restatement		
Horizon IT Scandal – guidance for colleagues Horizon IT Scandal – guidance for colleagues		
Subpostmaster Contract (SPMC)		
Local Agreement		
Main Agreement		
Historic Contract List		
Decision Rationale document		
Document Library		
Use of Puzzel and Contact Logs		
Termination Decisions – Legal Assurance		
Postmaster Suspensions Decision Governance Committee – Overview		
Postmaster Contract Termination Decision Committee		
Contract Termination Decision Review Panel		
End of week review		

Week One/Week Two		
Action	**Date Complete**	**Comments**
Contract Escalations		
Team Processes		
Branch Assurance Visit		
Performance Intervention		
Contract Performance		
Contract Suspension		
Contract Termination		

Week One		
Action	**Date Complete**	**Comments**
Introduction to Postmaster contract types		
Postmaster Support Policies		
Operational controls		
Contractual Casework		
Decision Review process		

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Review of Learning & Development Support		
Discovery Day		
End of week review		

Week One/Week Twp		
Action	Date Complete	Comments
Contract performance		
Auditor contact		
Non-suspension		
Suspension		
Termination		
Team inbox		
Teams site		
Restrictions processes		

Other team contact		
Action	Date Complete	Comments
Regional Manager/Area Manager teams		
Mailwork Manager/Policy Advisor		
Onboarding		
Network Provision		
Network Support & Resolution (Tier 2/Tier 3)		
Postmaster Account Support Team		
Training Team		
Branch Support Centre		
Network Monitoring		
Branch Assurance Team		
Assurance & Complex Investigations/Speak Up		
Financial Crime		
NFSP		

Ongoing		
Action	Date Complete	Comments

Learning & Development Support		
Action	Date Complete	Comments

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