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Internal Stakeholder Feedback
Appendix A

Lose			
Name	**Stakeholder Area**	**Training Area**	**Feedback**
Bob Collins' Team	Network Field Support	PTC	Lose cash check at PTV, the office will be audited with in the first 9 months
Dave Ogleby's Team	Network Field Support	Classroom	Sales Session - Too long a session , delegates don't like it and don't participate,
David Patrick's Team	Network Field Support	PTC	I don't think the current procedures are relevant when the branch transfers from one nominee to another and the staff remain in place. Much of the one month and three month contact questions simply do not apply.
		Classroom	8 days - Too much to cover in the 8 days, but the new delegates do struggle to take all on board with the timetable sessions
Julia Mann's Team	Network Field Support	Classroom	46 Cash Management - Relevant only to Sub Postmasters. Can be covered much better on site.
		Classroom	30 Giro Practical - Can be covered better in daily revision
		Classroom	6 Credit Card - We can only refer to the leaflet
		Classroom	59&60 NS&I - Losing the work, premium bonds can be incorpoated into PO Savings, which I shall comment on later
		Classroom	12 pt2 Perfect Branch - See no benefit to this exercise
		On Site	Ready To serve - This is something the Subby may do for a couple of days and then it's just going to be forgotten about. Maybe it should be a 'once a week' task, just like checking scales is, and not every day.
Chris Fayers' Team	Network Field Support	Classroom	Focus CTC on core products and leave sales until a later date
		Classroom	Spmr's feel the sessions are too rushed. Too much info in a short period of time (Three people commented on this)
		PTC	Lose the 1 month phonecall. (four people commented on this)
Rita Kendellen's Team	Network Field Support	Classroom	Insurance session is far too long. Could be split and use session on Car Tax to introduce car & bike. Home insurance linked with redirection etc

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		Classroom	All out of date material being sent to CTO and in prep box.
		Classroom	NS&I products from course leave only Premium bonds and INVAC account in light of recent events
		Classroom	Day 5 End of day - no work done?
		Classroom	Day 6 Stock balancing session - No stock has been used since last balance
		Classroom	Day 8 - Again stock balancing session, only thing to check MVL's session
		PTC	Lose the one month phone call and the PTV at three months and change it to a PTV at one month and PTA at 6-9 month stage. Generally if a Subpostmaster is struggling with a particular element it will have raised itself by one month, it is much easier to sort out problems on site rather than over the telephone, if additional training/ support is required the Sub may be reluctant to ask for it over the telephone but on site you can see the issue. It seems daft to me to leave it until the 3 month visit if the Sub tells you over the telephone that everything is fine at the one month stage.
		PTC	If three elements of PTC are to be maintained then the questions should be less repetitive. What is the point of asking at one month "are you aware of the Helpline to assist you" then repeat the question at the PTV and PTA. If know about the Helpline at the one month stage then they obviously know about at PTV and PTA so why ask again it just makes us look unprofessional. The questions should only be repeated if there was gap last time.
Linda McLaughlin's Team	Network Field Support	Classroom	Can we find a compromise, for existing Postmasters who are required to attend classroom training.There have been several occasions recently, where postmasters have attended courses.For example Twechar, where the postmaster had 10 years previous experience, but had taken over the Office from his father. He only required the conversations, to boost Office sales. Castlemilk road where the Postmaster had owned and run Burnbank for over two years, so only required the conversations. Fortunately the attendance of both Postmasters was not detrimental, or disruptive to the new trainees, but this could easily be the case in future. In addition, the above examples could easily produce negative Kendata scores as a result of attending a course needlessly.
		Classroom	Loose notes reference to pouch numbers as there are only two pouches
		On Site/PTC	From my experience both are working well, and feedback from the postmasters has been positive.

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		Classroom	Blue Cashcheques transaction especially is now very uncommon and could be covered on site if necessary this would give more time in class to introduce Paystation and stress to the delegates' how important Paystaion is to the future of the business rather than spend time on paper based transactions that we as a business are moving away from.
Chris Gilding's Team	Network Field Support	Classroom	The Perfect Branch - The content of the slides is poor and basically is already covered in the sessions Business Awareness, Customer Service and The Secret.
		Classroom	PSA – daily - A few seconds after each session is all that is needed for trainees to enter any comments on their PSA. We also have 1 ½ hours on the last day to catch up if necessary.
		Classroom	Handout – The secret assessing conversations - More beneficial is to replace this with the 'Science behind the conversations' (to go with the Minimum standard conversations handouts.)
Frank Martin's Team	Network Field Support	Classroom	1&4 Intro H&S - Wording on slide e "interesting" about yourself.
		Classroom	18 RM Inland mail - slide 16 unnecessary. Slide 17 unnecessary in conversations handout slide 26 unnecessary slide 38 as slide 17
		Classroom	7pt2 Regulatory Compliance - Slide 22 add to notes instead. Slide 30 The video (if available) duplicates what has already been trained
		Classroom	70/72 International Letters etc. Slide 9 as all others of this type - too confusing on aslide. Small packet etc lose
		Classroom	9 The Secret - 45 Slides!!! This whole session does not work & is unnecessary if the sales aspect of our transactions are delivered well.
		Classroom	47 Etop ups - Slide 18 as before - its on a handout
		Classroom	65 Homephone & Broadband - Slide 7 & 11 on handout
		Classroom	Min service standards9/05 - colours, cant read, coloured blind people cant read. States on school for blind, red and green unreadable.
		Classroom	Min standards - Sheet 11, 4th triangle along writing unreadable.
		Classroom	Reg Compliance - FSA, AML and Mails
		Classroom	Business Strategy - 3/4 shows values as FACTS

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		Classroom	Introduction to horizon 8/1 - Q3 customer has £5

Change/Add

Name	Stakeholder Area	Training Area	Feedback
Bob Collins' Team	Network Field Support	Classroom	More practical's to be included in classroom sessions. This would give a better understanding of their knowledge of transactions and also improve our ability to complete the filling out of the PSA
		EASE	Set-up a group to change and test what goes on EASE. People using the system regularly should control more of what is on it and where it goes.
		All	I know we use Mondays etc when free to update ourselves, but occasionally preparation time and keeping up to date should be scheduled.
		On Site	The staffing levels at some PO Local's. It is impossible to train out back on and all the sales assistants and keep the branch from being error free.
		Classroom	The length of time spent on Royal mail sessions. It always takes me twice as long as the time allotted.
		Classroom	The running order of the classroom course. To me it is totally illogical. What other business would tell their new recruits and agents who they were and what they about after four days?
		classroom	I've just completed a classroom course and session 28 could do with sorting out – unless it's already being looked at. Powerpoint still shows mixed business deposits and most of the practicals are still for Girobank or A&L Giro.
Dave Ogleby's Team	Network Field Support	On Site/Classroom	Is it necessary for a existing Postmaster to attend the classroom training and on-site training if they have several years experience when applying for a second or third office, this seems a waste of resource?
		On Site	Onsite too short at times - Once the transfer audit is done, the balance is shown on a Wednesday and a half day Saturday there is not always time to cover topics
		On Site/Classroom	Shorter classroom - Shorter classroom showing the basics, increase onsite so they get to know what the office requires and cover less common transactions, at times we leave them too early and unready
		Classroom	RM Inland Mail Session - Not enough time scheduled
		Classroom	Course time - Increase length of course to 9 days. Mails sessions aren't long enough and not enough practicals
		Classroom	Cash declarations - With regards to the classroom course on the timetable there is no mention of end of day reports on some days. As we are to encourage daily cash declarations enabling good cash management, maybe this should be scheduled on

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			the timetable especially for those just beginning to deliver the course.
		PTC	PTV's are important and add value, but due to the size of the teams now, and their geographical spread, it's unrealistic to schedule them to the FTLs. I've had some FSAs complete some for me, and also ran a training session and shadowing for FCAs, a couple of whom have done some visits for me
		PTC	This is from a SPMR, via Kendata, and although they're not an internal stakeholder, thought I'd include it anyway: "As the audit and Post transfer visits were conducted on the same day I was not pre-informed. Had I known I would have made provision for another member of staff to be present as I happened to be alone on that day and therefore not an ideal situation. Otherwise the visit went well."
		Classroom	Knowledge gain test - Can we have a pre and post course test (only 5 minutes needed?), similar to the one we had on EASE for the old module 2? The test could be on all aspects of the PO and classroom course, is given out at the start and the end of the course, and would give the FSA another indicator for the delegates' knowledge gain
David Patrick's Team	Network Field Support	Classroom	Since review my time in the classroom has been limited so I can only judge on a couple of days; Timings seem tight to get the course done in 8 days. Long days reduce learning ability. Course being rushed would be worse. Suggest an extra day to make a 9 day course, which would still be 1 less day than before modular course.
		classroom	Too much to cover in the 8 days, but the new delegates do struggle to take all on board with the timetable sessions. Suggest back to 10 days
		classroom	**Day 1**- should include **Business awareness** (sess. 3) due to the history of the Post Office, business value, retail standards and mystery shopper
		classroom	**Security** (45) should also be on day one to highlight importance
		classroom	**Royal Mail 1st & 2nd Class / Rec Del/Special Delivery** (18) The slides from 1-22 are correct and should follow on with Royal mail 1st & 2nd which helps the delegate to get used to using post office labels etc as this would be the first time they would be using the horizon icons , printer, cash etc.
		classroom	Recorded Delivery and Special Delivery would be easier to cover on day separately. To cover all three sessions above in 2.30 is difficult.
		classroom	**Day 2** – add **Postage** (16) **and Cheqs, Deb/Cred** (51) card to second day. Follow on with Post office card account 54 pt 1 and Per/ online Banking 51 pt 3
		classroom	AS SOON AS ALL SESSIONS ARE CARRIED OUT ON THE DELEGATES OWN POSITIONS THEN WE SHOULD BE COVERING END OF DAY EVERY DAY to make the delegates used to routine they will be carrying out in there branches, and not till day 3 as our current time table.
		classroom	**Day 3** - balancing, if a course starts on a Monday then day 3 should be kept as if they are in the branch to get the delegates used to Wednesday balancing,
		classroom	**Moneygram** (76) should be added into the 5 days as if a delegate is not attending the full 8 days then it has to be covered by the onsite trainer.
		classroom	**Day 7 – MVLs** (66 & 68) All V11 do not show correct prices on HOL screen , We

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			should if possible just carry out transaction of 1, PLG , 1 Motorcycle & Pc , The V11 for Disabled does not come up as a zero price so it makes it awkward to show delegates what to expect. Add in about the break in a tax disc in a slide with regard to, the customer can purchase it only 2 days before the end of the month, for the new month or have it starting from the 1st from the month they came which means they have lost 3 weeks but still have to pay for it to be legally on the road.
		classroom	**Passports** (42pt3) -Passport session would be easier if we had the previous example used from previous module
		classroom	Any scope for mentioning AEI service ?
		On Site	Transfer day-even if transfer audit is efficient (cash/stock neat/tidy/well presented)- delays on transfer of deeds/funds due to solicitors/banks can make it a late opening (or even next day). Can funds/deeds be transferred the day before?
		On Site	When training on site hours tend to be longer than when auditing so can accrue quickly. Also time to prepare handouts, /finish audit reports / fill in PSAs /Action Plans needed,& especially with FUB now a longer activity much longer -. I suggest day after FUB as an admin day (if a late balance how do you get 11 hours break if an early audit start required), and a prep day before. If last day on site is a Wednesday, an audit Thursday AM is again inadvisable.
		PTC	Amend for Locals – especially for PTV re sales & remuneration
Julia Mann's Team	Network Field Support	Classroom	64 PO Savings - Overcomplex with delegates being bombarded with features on all savings. Let's use the HOL kit in practical support of products and services ie concentrate on instant Saver which can be processed on HOL, and also premium bonds which again can be processed on HOL. Quick overview showing web site on our other products.
		Classroom	Practical Revision - Add a 40 min session beginning of all days from day 2 onwards, covering mailwork, banking, giro, APs etc as course progresses. I get feedback on every course from delegates saying they want more time using the kit processing common transactions
		Classroom	51pt1,51pt3 & 54pt1 - Merge these three sessions and allocate the time to cover properly. They all make use of same technology on HOL and can be run well together. As personal banking cannot be processed on HOL just to give overview only on these.
		Classroom	42pt2 Bureau - Pre order process does not work on HOL so quick overview only needed. Rem in currency to each SU and concentrate on buy and sell of Euro Dollars only. Carry on with Travel Money Card as it is. Overview only of travellers cheques as we cannot process.
		Classroom	Insurances - Very brief overview on Insurances and where to access info ie website, or Help.
		Classroom	Concentrate on practical 'Customer Referrals' exercise using Car Insurance / Home insurance. Can't remember if we can completely process Over 50 application on HOL in classroom. If we can have an exercise on taking application and in depth selling

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			scenarion using Over 59 Prospectus.
		Classroom	Reversals / Common Problems - Build in a problem solving session separately into course covering common errors and how to deal with them ie Adjusting cheques, AP eversals, Giro Reversals, Spoilt Labels, Reject Labels
		Classroom	HOL Help - Exercise similar to that for COM's. Use questions that we know will be asked in branch eg DVLA VED; stores catalogue; country codes; customs; prohibitions etc
		Classroom	Timetable / Days Allocated - We can cover the course in how ever many days are allocated by cutting the content and quality down.
		Classroom	I believe we need to find what content is actually wanted and needed, write the sessions and allow adequate time to present them properly (by time testing the sessions) build in time for revision, make maximum use of the Horizon kit, and relegating some of the talking sessions to handouts gven before the delegates arrive, to make use of the kit to maximum effect.
		PTC	1-month call - Would be better as a visit
		PTC	6-9-month audit - Too much to cover with Audit, Cat questions & PTC questions
		On Site	Minimum Service Standards (conversations) - No problems with these personally but most new entrants seem to want to ask the questions in their own way. Then, at later visits, the correct conversations are rarely heard.
		Classroom	Timetable needs adjusting. Too much information on Day 1. Postage, etc. should be on Day 2 with Day 1 covering the admin sessions, Compliance, Securtity, etc.
		PTC	1 month call - PTC – A visit is more beneficial on the 1 month PTC. A phone call is not always convenient to the subpostmaster.
		On Site	Pre-Training Checklist - Could the following be added to the list – Are all forms and leaflets the current versions? If not, can you please order the current versions before the Branch Transfers? (This will aid and encourage new PM to practice conversations)
		PTC	Only completed one of these as yet, but it felt too soon to be contacting the PM, he hasn't had a chance to get into the role. I think it would be better to make these calls at the 2-Month stage.
		On Site	Ready to Serve - Change to a form that is completed once a week (Monday)
Lee Heil's Team	Network Field Support	Classroom	PSA - Retention – how long? Who it's sent to – Contract Admin Team not branch support Team
Chris Fayers' Team	Network Field Support	PTC	Do Compliance at 3 month PTV then gaps can be picked up at Post Transfer Audit
		Classroom	Not long enough in classroom.
		Classroom	Not enough practical sessions. More opportunity to put into practice what has been learned. (three people commented this way)
		PTC	Kendata forms do not fit the process as there are times when all we are having is a chat.(Two people commented on this)
		Intervention	There is not enough information on the Intervention Request form / have found the visit unnecessary on arrival. (Two people commented this way)
		Classroom	Prep boxes have missing handouts/brochures.

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		Classroom	Day 1 of the counter training course is too busy. To do the Introduction/Horizon/Stock unit/Postage/All the mails/ Cheques/Postal orders on the first day is too much for them to take in. 1st -2nd-recorded delivery-special delivery is too important. The Mails session needs to be changed to a first session later in the week. **(All NFSA's who deliver CTC said this)**
		Classroom	The Insurance and Moneygram sessions are only available to delegates who do Passports/MVL.
		Classroom	There should be 15 mins *each day* for delegates to complete their PSA.
		Classroom	On day 5 the delegates do a balance but there are no transactions to print reports for. This would be a good day to do a practical session.
Pete Jackson's Team	Network Field Support	Classroom	Weekly evaluation at the end of 6 days – take time out from PSA. We feel an evaluation is a better guide to delegates understanding.
		Classroom	PSA needs to be revisited as we feel at the present it does not give a guide to how the delegate has performed in the classroom.
		Classroom	Knowledge quizzes for example – the ones used in module 2 for the financial products.
		Classroom	More practical's, delegates find hands on more beneficial.
		Classroom	Classroom should be made a specialist that is not to say that no one else should ever do it. All should be given the opportunity to cover if necessary. We feel it gets watered down if it is not done for a while, and this is not fair on the delegates.
		Classroom	Train the trainer? Quality needs to be good, Sub postmasters are investing a lot of money and poor training also has a knock on effect when it comes to an audit.
		Classroom	Compliance workbooks or learning packs should still be issued as delegates that have been on the course have not been able to read up before taking the on line tests, and have no points of reference afterwards.
		Classroom	Could the sub postmasters be issued with a simplified version of the toolkit that was given to WH Smiths managers, we think this would save on interventions.
		Classroom	Secret slide – far too long, too many slides, mail workshop results slide is not easy to understand. Made for internal use – BDM's??
		Classroom	Split up the insurances, link them to sessions – example, home insurance linked with redirection rather than 3 hours on insurances.
		Classroom	DDA pack – is it sent to the office or do they just inherit one? Or could they have one sent to them with the joining instructions so we can cover it in the classroom.
		Classroom	Embed DVD's into the sessions. Example – mails session dvd session 18. This was very advantageous.
		Classroom	Session 18. Revisit the order of the slides, mail segregation and cop are mentioned with special delivery and should be in with the first and second class slides, because neither cop or mail segs applies to special delivery.
		Classroom	End of day cash declarations should be on the timetable for every day as a minimum.
		Classroom	Is it possible that post masters that have experience of the counter, and are competent could sign a disclaimer to exclude them from the classroom, as it is

			distracting for new entrants and can also be de-motivating?
		Classroom	Stock balancing is only 2 slides and that is taking about cash management, which has already been covered in an hour's session. It needs to have more reference to all aspects of balancing – for example, TP and BP, net discrepancies' settling centrally, transaction corrections and rems.
		Classroom	Inconsistency on slides – some have twirling numbers, some have showering – the format needs to be simplified.
		Classroom	Any questions at the end, should be build into the last slide. This also tells the trainer it's the end of the session slides.
		Classroom	Prep boxes - out of date leaflets included within.
		Classroom	We keep getting experienced Spmr's on CTC's and after discussing it with my team we agree that that they are not a benefit to the course. Not that they are purposely trying to disrupt or spoil anything. It's just that we find They get bored listening to what they already know. Some have had to pay extra wages so they can attend to be told what they know already. They try to help others which is not always a good thing as they show them the shortcut's etc. When they do exercises on Horizon they complete well before the others and this has a detrimental affect on the others confidence. Some contradict or tell them "how it should be done, never mind what the Post Office say's" Please don't think we are being negative, quite the opposite. Our suggestions are that Have a 2 day course for them where we can concentrate on matters such as branch standards, compliance, sales, etc. Arrange a training regime that suits them, such as on site. 1. The trainer assess their capability 2. Helps any member of staff that may need support 3. Concentrate on any specific area the Spmr requests help on 4. Agree with the Spmr what we can do best for his office 5. Agree with the Contracts Advisor this course of action 6. Have a signed pro-forma that the Spmr signs to say he is OK with this process.
		On Site	Also we think we could look to have a different process on-site for Spmr's who are not going to have an active part in the running of the office. If we try to get them to be behind the counter for the 6 days training this leads to problems.
Rita Kendellen's Team	Network Field Support	PTC	1 month phone call to six weeks after FUB
		PTC	Follow up visit sooner to ensure weaknesses' shown on-site can be corrected sooner rather than later i.e. ATM, Lottery, Sales, cash management. Possible reduction in number of interventions required.
		Classroom	Shut down time needed for course.
		Classroom	Extra end of day routine needed
		Classroom	Timetable needs looking at, delivery time for sessions needs to be based on actual delivery

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		Classroom	Course timetable too tight, Needs to be 9 days split 7 & 2
		Classroom	No proper evaluation on how delegate has understood or performed during the course.
		Classroom	Extend to 7 or 9 days to allow more time for practicals
		Classroom	More practical materials are needed.
		Classroom	Mails revert to 1st,2nd recorded, special as way of introducing products
		Classroom	Add handout for spoiling tax disc's to prep box
		Classroom	Timetable needs looking at especially if full course and slow learners
		Classroom	Not enough practical's
		Classroom	Strange that Insurances are not covered on six day part as these are key to the business
		Classroom	Found timetable very restricting, no real time for lengthy questions or lack of understanding by delegates.
		Classroom	Mails on first day a bit heavy as not a lot of time given to practicing with HOL.
		Classroom	Business awareness needs to be earlier to ensure delegates know what is at stake for them and the business as it is a partnership.
		Classroom	Moneygramm all officers do why only MVL offices etc get training
		Classroom	More practical's needed to make balancing and end of day more realistic
		Classroom	Time needs to be allocated to ensure materials are up to date in CTO long before prep day as not enough time to get up to date POPOS especially if OOD material missing in prep box.
		Classroom	Add practical sessions to make End of day day5 and Stock balancing day 6 more apt
		Classroom	Moneygramm to be included in 6 day part of course as ALL offices can do it
		Classroom	Bureau session needs to be made more appropriate to offices on course especially if only Pre order/Euro on demand
		On Site	Ready to Serve Document so that it is completed weekly rather than daily, by the end of week 1 the Subpostmaster just goes down the list and puts a tick against whatever was ticked the previous day without reading the question and consequently the form loses it value.
		On Site	PSA Alter PSA so if you mark a subject as Red then a comment feeds through to the action plan (make it the same as the CAT reporting tool).
		On Site/Classroom	Would like to see a place where comments can be left by the on site trainer, e.g. Subpostmaster generally very good however there was an issue when his paystation crashed three times in one day or Subpostmaster had his rubbish stolen whilst I was on site. This would assist with the PTC process as whoever was completing this element would have an understanding of any problems the Sub was having.
		PTC	Visit is extremely useful to get genuine and honest feedback, however it is not best use of FTL's time and generates high t&s costs because of the areas covered. Perhaps they could be scheduled for the FSA and then the FTL to pick up at least 2 per six months for each of their FSA's to complete to get this feedback on their performance

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Linda McLaughlin's Team	Network Field Support	classroom	Change timetable to flow better – why do we wait until day 4 to tell delegates about our business
		classroom	Add more information regarding how a branch works difference between office & stock unit, TPs & BPs, how Horizon accounts for transactions.
		classroom	Review sessions & slides to ensure relevant and no mistakes (1&4, slide 7, there is no test – session 7 pt 2, slide 3, Or Branch?)
		classroom	Add section on Paystation
		classroom	MoneyGram - Move from Day 8 until sometime in first 6 days as delegates' who only attend the first 6 days miss out on a transaction that is now transacted in all branches and is also a very high income generator.
		classroom	More time in class needed to practise transactions. Overall I found the class very tight on time especially for the delegates' only attending for 6 days .I did have more time over the last 2 days could all delegates' not attend for 8 days ?
		classroom	With the current format we can tell delegates' How to do something and let them do it on the horizon terminal. But we cant "Show Then" in a full classroom could we have a spare kit in the classroom are more HOL screenshots in the PowerPoint presentations.
		On Site	Introduce the sales model to Sub Pm and coach them how to coach their staff by using the science behind the conversations. Also how to run focus days and staff warm ups
Chris Gilding's Team	Network Field Support	classroom	Add: Recap/practical - 30 mins daily - Most trainers actually do this at the start of each day, recapping the previous days' transactions, which is essential to confirm understanding and to give confidence to the trainees. Therefore why not make it an official part of the course.
		classroom	Change: Combine the Cashcheques and DWP sessions which are very similar There is no need also for 2 separate questionnaires, these could also be combined.
		classroom	Change: Day 1 is overloaded. Suggest moving Cheque acceptance to day 2 and Postal Orders to day 4. This will give more scope to very important day 1 which currently is under too much pressure.(the HOL Help function exercise needs extra time if we are to achieve our goal of selling it!!) (See Timetable embedded on 2nd tab of Excel Sheet)
		On Site	Add: Details and Application for Grapevine included in New Agent Welcome Pack. To raise awareness of the Grapevine service and encourage sign up from all Agents on appointment
Frank Martin's Team	Network Field Support	Classroom	1&4 Intro H&S - "something about yourself.
		Classroom	18 RM Inland mail - Slide 8 untidy. Slide 9 too many words, this could be mostly notes
		Classroom	51pt1 CheqDebitCredit Card - General note: Would be good to have a slide to explain what we can/can't accept cheques for.
		Classroom	37 Postal Orders - Slide 10 not in keeping with other presenations when indicating a

			practical is to be done.
		Classroom	7pt2 Regulatory Compliance - Slide 4 says "Activity One" but there are no other "activity" slides.
		Classroom	70/72 International Letters etc.Plain text with 3 headings and list underneath of what can be enclosed in each. Wings are stupid
		Classroom	12 Customer service - Better if merged with session 1 Intro, too late in the course by day 2
		Classroom	64 Savings - Very wordy slides, could do with a lot of simplification & most of the detail in the notes.
		Classroom	23 RM parcels - Slides 10,11,12 & 13 are repeated over the next three sessions, it's a bit repetative & heavy handed
		Classroom	43pt1 PFWW Inland - as above
		Classroom	43pt2 International Parcels - as above
		Classroom	42pt1 Travel Insurance - slides 16&17 are the wrong way round
		Classroom	42pt2 Travel Money - slides 34&35 wrong way round
		Classroom	42pt3 IPS - slides 11&12 wrong way round
		Classroom	76 Moneygram - Should be in first 6 days
		Classroom	80 Feedback & Closure - Last few slides could be in a better order.
		Classroom	Min service standards9/05 - Red green to white on red.Black on red to white on red
		Classroom	Min standards - grey should be black writing.
		Classroom	Reg Compliance - Receipts delegated bring in do not state which tests they have passed, they need to be titled by the compliance team
		Classroom	Business Strategy - New values are FEB
		Classroom	Introduction to horizon 8/1 - Change this to £6
		Classroom	1 and 4 session H & S - slide 14 mis spelling shows LACATION
		Classroom	Slide 3 H&S - add the word NO TEXTING on mobiles
		Classroom	H&S slide 16 - Green line around items for 10kgms plus
		Classroom	Introduction to horizon trainers notes - Add after slide 5 but before 6, delegates need to log on with the cto user name, create themselves,THEN they log out and log back in using their new user. Then complete the practical exercise
		Classroom	DWP answer sheet - Full driving licence if paper one, or full/ provisional photo driving licence
		Classroom	70. 72 - add cash and jewellery must be sent in polyops, counter focus has picture
		Classroom	Ses 46 slide 3 notes - add in calculation how we got to the final sum.
Julia Marwood	Network Hub Team	classroom	Not sure what you cover in the 'intro' bit but we need to make sure that we bring this session into line with our Post Office Story …. (do we show our heritage video?) … are the values in line with the PO Story stuff around care, passion and trust? Also need to make sure there is something in the intro about our future aspirations and the major change programmes going on across the business i.e. NT, Crown

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			Transformation, Front Office of Government etc. Bit concerned that there is absolutely no mention in the objectives about focusing on providing a high standard of 'customer service' … the focus seems to be sales and transactional! I think the first or second bullet needs to reflect the importance of providing a high standard of service to the customer (as well as selling of course!) but if you get the first right the sale will come as a matter of course.

Keep			
Name	**Stakeholder Area**	**Training Area**	**Feedback**
Bob Collins' Team	Network Field Support	Classroom	The content of the Counter Skills Course. It is only the timings and running order that is wrong.
		PTC	The whole process has impressed the agents I have been involved with.
		PTC	The PTV at the three month stage works well with the FTL being able to access the performance of the FSA as well as being able to deal with problems and issues raised my our new Postmasters.
David Patrick's Team	Network Field Support	Classroom	Day 1 - Keep sessions 1 &4, 8 and 7pt1 & 5 Day 2 – Keep sessions 7pt2 , 70 & 72, 46, 47 Day 3 – no changes, can move sessions around Day 4 – as above Day 6 – as above Day 7 – as above
Julia Mann's Team	Network Field Support	PTC	3-month visit - No problems with this
		On Site	SPMR Self Audit - No problems with this
		PTC	Pre – Transfer Contact - No problems with this
		Classroom	Classroom Course duration & content - Cannot comment since I have not run a course for a very long time.
Lee Heil's Team	Network Field Support	Classroom	Keep the sessions so that just 1 FSA can do the whole course rather than in the past having 3 FSA's to do modules 1,2 and 3. Works well and is easier to resource.
		On Site	Works well and shouldn't be change
Chris Fayers' Team	Network Field Support	PTC	A great opportunity to engage with spmr and find out how they are doing. This provides a quick healthcheck and gives them a chance to air their views and concerns. (Four people commented this way)
Rita Kendellen's Team	Network Field Support	Classroom	Conversations handout very good starting point for delegates
		PTC	Self audit pack a brilliant idea but make all the questions questions. E.g. Question 38 "my staff and I are competent in knowledge of NS&I products" this should be a specific

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			question to test knowledge. E.g. If Premium Bonds are purchased on 3rd December which month will they be eligible for the draw?
		On Site	Ready to Serve document is useful for new agents to prepare themselves. Maybe not to be used on a daily basis when they are more used to the job, but new agent feedback has said as an intial aid it was very useful.
Linda McLaughlin's Team	Network Field Support	Classroom	Duration of course 6 to 8 days.
		PTC	Potential to select a more bespoke option for smaller branches, especially for Island branches. Perhaps forego a face to face 3 month visit, replacing with a phone call and spending longer onsite at 6-9 month audit.
Frank Martin's Team	Network Field Support	Classroom	8 Intro to HOL Helpline - no issues
		Classroom	7pt1 & 5 Take over stock unit & Datestamps - no issues
		Classroom	16 Postage Stamps - no issues
		Classroom	46 Cash Management - no issues
		Classroom	28pt1 Santander Deposits - no issues
		Classroom	28pt 2 Aps/reversals - no issues
		Classroom	51pt2 Cashcheques - no issues
		Classroom	3 Business Awareness - no issues
		Classroom	10 Balancing - no issues
		Classroom	74 Redirection - no issues
		Classroom	45 Security - no issues
		Classroom	54pt1 POCA existing accounts - no issues
		Classroom	59&60 NS&I - no issues
		Classroom	54pt2 POCA opening etc. - no issues
		Classroom	12pt2 The Perfect Branch - no issues
		Classroom	66&68 MVLs - no issues
		Classroom	50 DVLA Premium Service - no issues
		Classroom	61 Insurances - no issues

Issues

Name	Stakeholder Area	Training Area	Feedback
Bob Collins' Team	Network Field Support	Classroom	Needs to be longer as can be difficult to get every thing done especially with a full course of delegates.
		EASE	I find EASE so cumbersome and out of date. This is the starting point of all the other bits, so needs to be user friendly and up to date.
David Patrick's Team	Network Field Support	Classroom	I only shadowed for the last 2 days of the course which covered passports, car tax and car/bike/home/life insurances but I found the sessions very rushed and only gave a very

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			brief overview with no real depth
		Classroom	One of my delegates suggested the Minimum Standard Conversation would have been useful if they had it sent to them with the distance learning pack so they would be able to look at it in advance so as to see what they would be doing when we cover the perfect branch.
		Classroom	I feel that the new module does not cover any means of test after day 5 and day 8. Previously with the old course we covered a course on day 5 which gave an indication on how the delegates under stood the transactions and the course, which also meant that any weak areas could be forwarded on to the onsite trainer , The same with day 7 & 8 there is no test to show if the delegates have understood the sessions.
		Classroom	There are many areas as a ctc trainer that I have had to deal with in a short period of time, and its then we build up the rapport with the new delegates, if we know they have left the course happy and understood , then the transition will not be so daunting.
		Classroom	I have heard from previous delegates with the group how much they have to take in such a short time.
		Classroom	Many of the new delegates who are spm do not seem to have contact from HR & Recruitment with regard to contracts, transfer dates change due to problems with outgoing, so may be if both teams could contact the new spm whilst they are on the course it would avoid cancellation or changing transfer dates at the last minute,
		Classroom	Most of the time the spm have not received contracts and additional papers from HR.
		Classroom	It would be nice to have a CA to sit in on a session to see how delegates are doing on the course, but understand they are busy, but we have to pick up the pieces when they are struggling.
		Classroom	Over all my main changes would be to have a 10 day course as before, and having day 2 on all sales products , The secret and perfect branch all covered at the same time.
		Classroom	Also to have a test on both day 5 and day 10 so we know how well the delegates have done and also it gives the ctc trainer an idea on how the course went.
Julia Mann's Team	Network Field Support	On Site	Ready to Serve - This requires the Subby to do a check every day which is too much and not really required. As a result, they tend to do it for about a week or two and then forget it. It would be better if it were a 'once a week' task and maybe the completion of it should be checked at audit.
		PTC	1 month Call - These calls can be difficult. You cannot see if the Subby has a queue and if it really is convenient to be talking with him. A visit also allows you to check on the general running of the office in the most crucial early stages e.g. is he/she doing everything right. Any problems can be resolved quickly which, under the present procedure, would not be spotted until the 3 month visit.
		PTC	6-9 month audit - There is rather a lot to do at this audit and it all takes a long time. It can be very difficult to ask all of the questions, and talk about everything that we have to, whilst the Subby is trying to serve customers.
		On Site	Minimum Service Standards (conversations) - Is it just me? I've tried to instil the correct conversations into the folk I've trained but they all want to 'say it their way'. Then at later

			visits, all of the work done on these conversations is proved to be a waste since they are not having them as they should be.
		PTC	DDA Accessibility Guidance Pack - The PTC document states the following on the front page, and is an action at the 1 and 3 month contacts - *All New Agents must complete DDA Self audit contained within Guide prior to PTV visit. Completion is also a condition of appointment. At the 3 month visit* This is also always a Condition of Appointment. However I have completed at least 19 PTV's and not one PM has ever seen sight of this document. I always end up emailing the PM a copy after my visit. This needs to be looked in to and a copy need to be with the PM ready for when they start at their brach – either sent by HR or Contract Advisors.
Lee Heil's Team	Network Field Support	Classroom	Not all FSA's are trained to complete classroom training thus limiting our resource.
Chris Fayers' Team	Network Field Support	Classroom	We should be holding 'Train the Trainer' sessions to make sure we are all delivering the sales sections in the same way.
		Classroom	It would be useful to ask a member of the Sales Team to take a 1½ - 2 hour session on sales as they are more experienced than us.
Rita Kendellen's Team	Network Field Support	Classroom	PSA time at end of course who goes first? What keeps others occupied and ensures privacy when delivering the feedback to individuals
		PO Local	General - Completing the transfer and then expecting the branch to open in the afternoon is a very optimistic expectation. In all but a handful of cases the money transfer for the business does not take place until at least 2pm on the day of the transfer and it is quite often later than that. Once the money has transferred the incoming is then pulled in all directions, trying to learn from the outgoing what all the keys open and close, learning the locking up process, how the tills work, dealing with stock takers, removal men, agreeing meter readings, putting beds together so the children have somewhere to sleep that night, numerous phone calls from the bakery/ milk/ newspaper supplier wanting to set up accounts etc etc. The last thing they want to do serve in the PO. So you either get the staff running the branch, which is OK as you can get them coached in minimum sales standards (if required) but this could obviously be completed later in the week However as the on site FSA you want the new Subpostmaster and it is very rare to see him/her. If a single person branch you get a very harassed person who wants/needs to be elsewhere and he/she takes nothing in. No matter how much you stress on the pre transfer telephone call what the expectation is in my experience it does not happen successfully very often, I feel we should go back to lunchtime transfers and leave the PO closed pm. As branches are generally busier mornings that afternoons anyway less customers would inconvenienced. Branches were there are staff or the Sub wants to could still open after the transfer once the money has gone through and it would make better us of FSA time as we would not need to attend until lunchtime in all but the busiest branches where it may be beneficial to go a bit earlier. We would not to sit around for at least half a day and sometimes considerably more awaiting the transfer of funds. I am of course aware that there would be an additional cost of one day on site

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			training if it was decided to stick to the same delivery package as at present, but this would in my opinion be justified as the value of day one on site in terms of training is generally worthless.
		Classroom	Feedback from a new agent at PTV – As generally for most branches at least a third of transactions in branch are mails should we spend more time percentage in the classroom doing lots of practical exercises, playing customer and clerk, so that they are fully competent with mails items, This would allow time on site to do the easy scanning, etc. and postmaster will be more confident with initial customers and transactions.
Linda McLaughlin's Team	Network Field Support	PTC	New procedure for follow up balance at 6-9 months is a good idea and PTC process is quite straight forward to follow. Also Sub Pm self audit and Ready To Serve doc as been received well
		PTC	3 month PTV, should not be restricted to FTL only, should be utilised as a development opportunity for FSA. Also due to geographical location these visits can be extremely costly without making best use of FTL time. Feedback on FSA could be obtained by phone based on Kendata feedback etc if required
Chris Gilding's Team	Network Field Support	Classroom	The new Help navigation exercise - This new exercise crucial to the new course to 'sow the seed' of the importance of the Help function was not in my prep box (2 weeks ago). I had to print off my own copies. *Confirmation required that this will in future be included.*
		Classroom	Having done my first course for quite a while I went into this course with a positive attitude but possibly looking for issues. My initial thought is what has changed. I have already expressed the opinion that we might have missed the boat as far as making changes to the course and still hope this isn't seen as being negative and unconstructive. It seems to me all we have done is to take the old sessions, up date them a little but no longer call them module 1, 2 or 3. I was very aware that this course is still a one size fits all type of course which is aimed more towards the crown office branches. All of this might of course be changed with the network changes, even so, SPMR of Main PO Branches are not the same as counter assistants in a Crown Office, my feeling is there should be a course written completely from scratch that is aimed specifically at someone who will have to run a branch by themselves after a couple of weeks or so. As a for instance, we could cover Rem's more fully. The notes are very full now almost scripted and even though I tried to follow them I found I was talking a head of the slides. I do find it hard to train with the notes in front of me meaning that I have probably missed something that was important. The onsite training will probably high light if that is the case. When I was running courses back to back I developed my own style and more importantly, made changes. So the next course always ran smoother than the previous one, unfortunately this doesn't seem possible now, which I fully understand. Day 2 I found a very heavy day and I think the delegates did as well. Someone commented that Business awareness sits better in day one. I didn't really understand

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			slide 14 in session 9, and there are no notes. The notes for slide 6 say, 'you may have seen this before', when did the delegates see this slide before? If we are going to simply put another presentation designed for a different type of audience into the course, can we at least make some changes to reflect what we are about? In fact I wasn't comfortable delivering this session as although it clearly is important, I didn't feel qualified to deliver it. It is clearly designed to be delivered by an experienced sales manager. Still I feel I did my best.
		On Site	I haven't really done that much on-site training, however I don't see there is much change here. The main issue I think on site is training a new PM to run a well managed branch and some time in a classroom setup going through basic routines, i.e. Remittances, MVL procedures etc I am sure would be useful, let's call a one day induction.
		PTC	I can't comment on the PTV as I haven't done one, however the phone call is good as issues can be picked up quickly. As to the audit, again this is good as it picks up any problems, however, would it not be better to do a compliance audit at the 3 month visit and use the actual audit at the 6 month stage to gauge whether any gaps have been closed. This can then be seen not so much as finding fault but as part of the training and support. Most new PM's want to have a well run compliant branch and will take this seriously. The real concern would be if they haven't closed the gaps by the 6 month period.
Frank Martin's Team	Network Field Support	classroom	General Observations: The whole appearance of the presentations is mixed. It's quite obvious they've been written by different people. The result is an incohesive look and feel to the course which makes it harder to deliver and makes the trainer look less professional