

Introduction to Post Office Local

This document will evolve as the project progresses and so it is important to revisit it each time you are due to complete onsite support for this model. You need the most up to date information to contribute to the continued success of this project.

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1 week before you attend a PO Local branch to provide training support, YOU must contact the branch to confirm that they have received & completed a copy of the Onsite Training Schedule to organise staff to be available for you to support (forward a version to them via email were possible, if they haven't completed one, with the instruction to complete it and return it to you a.s.a.p. , it is on page 5) **& to confirm that all staff members due to undertake Post Office training have completed or will have completed by the first day of support, the mandatory Post Office Foundation online test for compliance .**

This will be dependant upon them having access to Horizon prior to Go-live, so we may want to emphasise this and clarify that as a minimum the training should be completed if Horizon is not available.

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MODEL OUTLINE

Post Office Ltd is committed to exploring opportunities to maintain access to products and services by providing an alternative form of convenience outlet. Post Office Ltd has been trialing new concepts for delivering Post Office services falling under the branding of Post Office Local.

N.B **Post Office® Local** was referred to as **Post Office® essentials** for part of the pilot phase and you may still see branding & references to Post Office® essentials: going forward all branches will be branded **Post Office®** however, if there are any outstanding references to Post Office® essentials in any documents it should be assumed these references apply to **Post Office® Local** (e.g. Operating Manuals). Internally, Post Office Ltd will refer to this branch segment/model as **Post Office® Local** to distinguish it from the other models we are rolling-out,

The Post Office Local service is available all the hours that the retail host is open which in most cases will be 7 days per week

- The new service is designed to be automated in almost all areas which reduce costs significantly.
- Automated services are straight forward to follow as all the instructions are available on the HOL screen meaning staff can keep up to date with transaction easily.
- This service offers a wide range of core Post Office products and services, including electronic banking, bill payments and budget payment schemes, Post Office® Card Account withdrawals, Postal Orders and postage, inland letters / packets and parcels (including recorded delivery, special delivery & express48), international letters / packets, or the individual country limit for small packets or printed papers. Customers can also Pre-Order foreign currency for collection the next day.
Services **not available** via Post Office Local include: **cheques** as a method of payment, **transcash bills** (non automated payments), **paper-based banking transactions** and **Parcelforce Worldwide International (including BFPO parcels)** items are **not accepted**.
- Post Office Local open plan service point is located alongside retail till.

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- Post Office Local branches will **EITHER** be Retailer (Operator) cash funded **OR** will receive POL remittances in the normal way.

Apart from this all the procedures and processes are the same.

Please make sure you read (without printing) the appropriate **Post Office Local Operating Manual** EITHER Retailer (Operator) Cash Version OR Post Office Ltd Cash Version. This will give you all the information you may require.

A copy of the Operating Manual will be sent via Email, directly to the Operator by HR (Farnworth) prior to commencement of the training, the FCA responsible for the office before it goes live will also provide the Operator with a copy of the correct manual but if it is claimed that this has not been received or deleted in error; the Field Support Advisor should email a copy* to the Operator at their first opportunity. (*if we have a version available)

FUNDING

Branches will **EITHER** be Retailer (Operator) Cash Funded **OR** will receive POL remittances in the normal way. Sometime in the week before you are due to attend the office to complete "Set-up" **you should be contacted by or YOU should contact the FCA** responsible for the office to discuss details of the office & Operator/ staff mix and training expectations: they will be able to answer any questions you have. In most cases it makes sense for the FSA to call the FCA and you should plan to make the call while you are preparing for the support as the information you need may be answered easily by the FCA.

POL Funded Branches

Cash is received in the normal way via CiT. Stock will be supplied to PO Local branches via the cheapest method which in most cases will be by using RMSD, even when an branch is POL cash supplied.

Stock & cash can also be returned via CiT along with "BdeC Pre-order buy backs" and the standard Remittance Handouts should be used as it applies to this model.

Retailer Cash Funded Branches

(2.9 Inputting and Removing Cash Process Handout)

Stock

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Stock will be received and returned by Special Delivery (Shared Service), but still needs to be remitted in & out on HOL.

Cash

The funds required for retailer cash funded branches are provided from the shop till by means of the process in the Operations Manual, using icons 'Loan To PO' and 'Loan from PO'. (After automation new icons will be "Operator Cash - In/Out").

ALL OPERATOR CASH IN/OUT MUST BE ACCOUNTED FOR IMMEDIATELY AND FULLY ON HORIZON WHEN THE CASH IS MOVED. You must ensure that the Operator understands the Settlement Procedure -

Please make sure you & the Operator have read and understood the:

Handout for Automated Settlement (leave a copy onsite). Use the **Daily settlement Example** from the PO Local EASE file and email copies of the spreadsheets contained at the foot of that example to the Operator preferably on the set-up day (*Daily Settlement/ Daily Settlement Printable*). These will help you explain the process (one is a working excel spreadsheet that has all the necessary formulas and the other is a manual version for use if a computer isn't available)

Ensure there is enough money in the Post Office at the start of each day for that day's transactions. Cash needs to be monitored on a daily basis and any surplus cash needs to be banked by the Operator in their nominated bank account as soon as possible. The Post Office will reclaim surplus cash via direct debit 3 days after a surplus has been declared.

During the training support it will be possible to judge how much money is required for each day's trading from the deposits made to the Post Office and the cash declared figure at the end of day (**ONCH to be completed before 19.00**).

For Retail Cash funded branches the *Best Practice* is to keep a float of approximately £3000 in the Post Office to start each day, depending on the transactions in individual offices

TRAINING SCHEDULE

PO Local Offer for new branches:

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The **current PO Local Offer for new branches** is for the Operator is to be fully trained on all transactions and products and up to 5 assistants are expected to be trained on basic transactions and products. Each office will receive 1 day Set-up & 1 day Induction Training and then additionally the maximum of agreed assistants to be trained and onsite support period should be detailed on the Vacancy Report but should not exceed:

- 6 days on site will be scheduled for 1 Operator and 1 Assistant
- 7 days for 1 Operator and 2/3 Assistants
- & 8 days for 1 Operator and 4/5 Assistants.

A FUB (follow up balance) will be added at the end of the onsite support and although PO Local branches can do their BTS at any time of the appropriate day, under BAU for the FUB you need to tell the Operator that we will attend from 1600.

If full training for the Operator and all the assistants is completed early, the above time can be reduced - contact your FTL to discuss.

Assistant Tick-lists should be started for as many assistants as the time and the assistants availability allows. There is no maximum on the number of tick-lists that can be started but it is the Operator's responsibility to complete these tick-lists once onsite support has ended. When starting a tick-list, priority should be given to compliance completion and use of the HOL equipment followed by training on basic transactions and products. The rough number of assistants eligible to be trained at any site should be relayed to you during the conversation with the FCA before set-up. The length of training you will be expected to complete (6/7/8 days) will be detailed on the Network Support Schedule and any worries should be raised with the FCA responsible for the opening of the office.

Below is a spreadsheet for the Operator to schedule their staff during the onsite training time. The FSA will be on site for normal core hours (approx 8.30 - 18.00 Monday to Friday and Saturday morning until 12,30). **The training schedule needs to be in place and agreed with the Operator before any set up or onsite activity begins. The FCA should have already made the Operator aware of this spreadsheet and you should have spoken to the branch in the preceding week to confirm this activity has been completed.** This is necessary to maximise the use of the onsite support so that our support is structured. It will help focus the Operator on when they and their assistants need to be available for training, **maximum two**

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people at any one time, and everyone receives training during the allocated time on site.



Onsite Training
Schedule v2.0

For the Operator a standard PSA should be used (including Action Plan) for assistants tick lists should be completed and any training gaps on the assistants tick list will be picked up by the Operator. Both PSA & tick lists are to be printed from EASE to ensure up to date versions.

Existing Agent to New Operator, On-site Conversion

If a new PO Local branch is opened by converting an existing Agent with existing staff & an existing location **they will receive 1 day set-up, 1 day Induction* and 2 days Onsite**, this is to deliver open plan training & security regulations and cover off the basic transactions for the new members of retail staff.

Full timetable embedded here:



PO Local Existing
Agent Nov 2011

*(on-site for the remainder of 2011-12 but potentially this will become a classroom activity depending on numbers from April 2012)

PREP & SET UP DAY

You can either print all the items from the EASE file or you make a request to receive a pack containing most of the items printed from the EASE file directly from Admin Support. It is essential that you are familiar with the material before the training support begins and printing the items yourself may be time well spent. Feel free to print some extra items you may think relevant (handouts etc) from the EASE files to use on site for training with the Operator - you might want to suggest these as best practice via your Line Manager. **An easy guide to the use of the materials** can be found by following the **PO Local EASE Guide**. You may need to allow extra time for personal development if this is the first PO Local office you are training or if you haven't delivered one recently, so please discuss this with your line manager.

The Operator & all their staff **MUST** read:

- **"Working in a Screenless Environment"**

This should be completed on setup day or for any staff not available on that day, before they start working at

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the PO Counter. This is a vital part of their security training and should be revisited when new staff members are employed.

Here are some best practice and tips from the pilot branches:

- You **MUST** carry out a transaction on set-up day using a bank card (pin pad) as the method of payment or for a balance enquiry. This is to check that the system is working correctly. If the transaction fails **report it straight away** - if you wait until opening day, the fault is business as usual and therefore not a priority,
- Check HOL Help is working - report it to the NBSC if it is not.
- Ensure that the Horizon system is in the **correct TP**.
- **Not all** PO Local Branches are now in **GROUP C** for Trading Period as they were with the earlier pilot. If the office is a new opening then ask the FCA if they know which group the office is aligned to. If it is still unclear, default to Group C. If the branch is a conversion, it should continue in the group it is currently aligned to (use the All Branches Database to determine their current trading group) and the **Branch Code** will remain the same.
- Allow the operator to remit in the stock, then take them through a balance and roll over to the next BP. This will give them extra balancing practice.
- Check that the **Stores Ordering** icon is working, if not you need to report it to the NBSC.
- During the set up ensure that the Operator and any assistants who will be working in the post office are able to load and unload the safe as this will need to be done before the retail opens or after it closes and you may not be in attendance at those times.
- Enter the **Paystation** opening times on Horizon.
 - From the **Front Office** screen select:
 - Licences & Government (F5)
 - Compliance (F2)
 - Paystation hours (34)

When entering the hours it is important to remember to "backspace" 00:00 otherwise the system won't let you enter any figures.

Being Discreet.

Make the staff aware that they need to consider the importance of the open plan environment and they have a

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responsibility to keep as much information as confidential as possible - confirm that this is understood using the bullet points below:

- Do Operators/staff realise the importance of being discreet?
- Do they know how to be discreet?
- Do they lower their tone of voice appropriately?
- Do they know to be as discreet as possible when counting cash?

Customers appreciate all the effort that is made to protect their privacy, so remind the Operator & staff to always take the time to consider the person they are serving and the other customers waiting in the branch.

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Standard PSA completed for OPERATORS

You will need to use the standard PSA process for the Operator/OIC and you should get the latest version from EASE. There is now a "Tab" specifically for use with PO Local branches- use this version. You will complete all the normal aspects including the Learning Action Plan which should reflect the ongoing focus for the Operator/OIC to continue staff training using the Assistant tick-lists to identify knowledge gaps. Additionally, the Learning Action Plan will serve as a reminder to the Operator to meet POL security requirements and maintain a good standard of house keeping.

In cases where the branch has multiple "Officers' In Charge" you need to put one of the names against the PSA & only one PSA should be completed at any branch. The aim is to cover everything detailed on the PSA and add notes against the areas that you feel may need additional focus.

BALANCING & TRADING PERIODS

It is at the **Operators discretion** whether they complete an office balance on a Wednesday for a **Balance Period (BP)** between Trading Periods (TP).

The branch has to complete a Trading Statement on the Wednesday that their Trading Group is scheduled to end their Trading Period (TP).

This should be done at a quiet time - it doesn't have to be completed at the "traditional" end of the day. If the quietest time is 8am or 10am or 2pm, a Trading Statement can be completed (**see note below regarding offices with Lottery).

The office must then REOPEN for business once the Trading Statement is completed regardless of what time of day it is (8.30am or 10.20am or 2.38pm) and continue trading and completing transactions. It does not have to be done at the same time each Trading Period either - just a quiet & undistruptive time for customers.

Transaction Corrections will NOT be generated if the office starts their new Trading Period immediately.

For branches of this size, an office balance (using the Stock Balance Summary held in the PO Local File on EASE) should not take long and should cause minimum disruption to customers.

**For Branches With Lottery.

In line with normal practices for an office with a Lottery terminal, a separate stock (usually names OOH - Out Of Hours) should be set up by the FSA during the office setup. This stock should deal with Lottery transactions and suitable training should be given during the onsite support.

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At **Trading Period** end, the normal counter stock should be rolled to the new **TP** as suggested above with the office continuing to trade in the new TP; the **OOH** stock should be dealt with on the Wednesday evening so the lottery sales for the day are taken in to account as per standard practice. The OOH stock can then be balanced & rolled in to the new TP and the offices Trading Statement can be produced.

SECURITY

In all cases ensure Operator and assistants are aware of security requirements for open plan working. Full details are accessed via a Link in the PO Local file held on EASE. Ensure a copy of '**Post Office Local Security Standards for PO Local**' is available and has been read and understood by you and the agent.

COMPLIANCE

The Operator is responsible for ensuring all existing and future members of staff serving at the Post Office Local have completed the **Post Office Foundation** online test along with any future compliance tests which will be sent directly to the branch. This activity must be confirmed as completed prior to your attendance at the branch to begin onsite training support. None completion should be feedback to the FCA & via the feedback forms to Sue Richardson.

ASSISTANTS

Registering

All the assistants should have been registered with HR prior to the office going live; you should confirm that this is the case and supply P250 forms etc if this hasn't been done. Please take one spare set of forms to leave with the Operator, for registering new assistants (P250 held on EASE) and stress the importance to the Operator of filling these in; stressing that new assistants' should be registered before they work in the Post Office. The Operator should contact the HR centre when they employ new people who are going to work on the HOL system, to request up to date forms (usually 2 weeks in advance of them beginning work).

TRANSACTIONS AND STOCK

PO Local branches offer limited transactions and stock items. The FCA responsible for opening the branch will be happy to speak to you sometime in the week before the set-up day and you should take the time to you aware of any additional "Bolt-on" transactions (eg. Local Collect, Bureau de Change or Mvl's). Feel free to give them a call. Please be aware that the bolt on transactions will

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vary from branch to branch. The complete list of transactions for Post Office Local is in the PO Local File held on EASE and you should leave a copy of this onsite. The only Special Stamps that will be received as stock will be the Christmas Issue. If the Special stamp icons are unavailable, these items should be booked in and sold as ordinary stamps, You will need to be aware that some of these branches may previously have been SPSO's and did a full range of transactions, there will be publicity available to make the public aware of the difference of the new offer. Please read the handout '**Objection Handling**' and leave this with the Agent to cascade to his assistants. *Pens, Paperclips, staplers, etc are provided by the Operator and are not included in the stores pack.*

POCA

PO Local branches **hold all POCA forms**. These branches only issue Vault Cards and complete automated transactions. A customer asking for POCA form should be handed the appropriate form, but for the customer to have the form processed, they should be directed to the nearest Post Office branch that isn't a PO Local.

BUY BACK

The PO Local model has the standard Pre-Order BdeC transaction as part of their offer. Training should be given on all aspects of this transaction especially the buy back arrangements.

- For POL funded branches, CiT will take currency pouches using normal remittance procedures; currencies should be returned with the next collection if POL funded.
- For Retailer (Operator) funded branches the Shared Service (RMSD) should be used. In these cases the buy back/s should be returned when the value reaches £2500 or before the end of the Trading Period - which ever happens first.

PO Local branches DO NOT buy back any Travellers Cheques

POPOS - leaflet list

The only leaflets held in PO local branches at this time are:

(4th November 2011)

PL5592 - Welcome Leaflets

PL6797 - Guide to customer services leaflets - English

PL6798 - Guide to customer services leaflets - Bilingual*

RMLT21 - Royal Mail made easy Leaflet - English

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RMLT22 - Royal Mail made Easy Leaflet - Welsh*

RMPME11 - Royal Mail pricing made Easy Leaflet - English

RMPME12 - Royal Mail pricing made easy Leaflet Welsh*

*The Welsh & bilingual leaflets are for offices in Wales only.

Insurance cover for cash

For both Retailer cash funded & POL cash funded branches the Operator is responsible for providing suitable insurance for the maximum amount of cash held at the branch also for providing appropriate security including alarms, safes etc as required by the insurance company.

For **POL cash funded branches only** the Operator can opt to purchase an insurance waiver from POL to cover cash held at the branch rather than arrange for their own insurance policy to include this cover. The waiver covers loss of cash through burglary and robbery only (terms and conditions apply).

Issues During Training:

If an FSA experiences any problems with the Operator or their staff during the training period which impacts on the training being undertaken, please flag in the first instance to your team leader. The issue should then be flagged to the FCA who will liaise with the Operator and raise further with their RNM if appropriate.

FEEDBACK

As this is a trial there is a need for us to understand the issues that surround what we are going to deliver for the network so we have a comprehensive list of feedback options. In all there is the possibility to complete 5 feedback forms; not all of them are mandatory but clear communication is needed and the ones that are mandatory need to be returned in a timely manner.

Initial Opening Hours Feedback

Below is a form to be left both as an electronic version as well as printed by the FSA (6 copies) at the branch. You must request that the branch make a note of the number of customers who arrive at a branch and are turned away because it is not open, along with the service the customer required . Each form has 20 lines available and each line can take 2 entries (40 customer slots). This feedback is to gauge the volume of customers who want to use the Post Office services between Post Office closing and the business's closing time if they are different. This is more likely to occur during the training support but if it happens outside that time the feedback should continue to be forwarded up until 28th February 2012.

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You need to organise the branch to forward this form electronically to:

Sue.richardson@**GRO** : either once a week or once a month.

Name the document: **Turned Away: branch name: branch code. dd/mm/yy**

(eg Turned Away: Huntington: 306614. 261011).



Turned Away
Feedback Form v1.0.

The 3 pieces of feedback that are mandatory at this point in the trial are:

- Induction day Feedback
- One Stop Feedback (if it is a One Stop Conversion)
- Level 1 Feedback Form

Induction Day Feedback

This form sits in the induction day training and needs to be printed by you to take to the induction training. Ask the Operator/OIC to fill it in while you are at the branch and hand it back to you. You must then enter the feedback on to the electronic version on your laptop and email it to sue.richardson@**GRO**. Title the email "PO Local Induction Day Feedback" and then title the document; "office code. date. office name" (eg. 123321.171111.Newoffice).



Feedback
Questionnaire PO Loca

One Stop Feedback

If you are completing a "One Stop Conversion", you will also need to fill in the One Stop Induction Day Feedback. Again, this needs to be sent to Sue Richardson & saved as - Office name. date (eg. Sandbox.171111).



One Stop on-site
training in Pilotv1 1

Level 1 Feedback Form

The Field Advisor should leave a standard Level 1 form with the Operator.

The 2 pieces of feedback that are not mandatory but could improve future support are:

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- Site Feedback for the Stakeholder
- best practice

Site Feedback for the Stakeholder

If you have experienced difficulties or had issues and you have solutions or want to share your experiences please fill in the attached **Feedback form** and forward it to your Line Manager who will collate any feedback before forwarding it on to Gillian.alstead@



Feedback Form Aug
2011

Best Practice

PLEASE pass any **best practice** via your Line Manager to Rita Kendellen using the form embedded below - it could help your colleagues.



PO Local Best
Practice v2.1