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Filename: End-to-end peak process changes overview-20210809 - Matt Swain
Client: Morrison & Foerster (UK) LLP
Job ID: UK0155456
Date Due: August 7, 2024
Transcript by TransPerfect

STEVEN BROWELL: …that can't join us. Or if, for some reason, I say something that doesn't make sense at the time, and you want to go back and have a look at it. Am I right to assume that most of you spend your time in Peak and not TFSNow?

MALE: No, everything I do, Steve, is in TFSNow. But I'm sort of from the change team, not release team. So I'm just here to observe, really.

STEVEN BROWELL: OK. There are a couple of sections to this, and I was just trying to determine where it would be best to go spend time or not. I'll judge it, and if we seem short on time, I'll speed through a few bits. But a couple of all-hands calls ago, I mentioned that there were a series of improvement initiatives being spun up. And these were because, having completed something called the Horizon Audit, which Post Office commissioned us to do to explain certain ways of working, and having answered quite a few questions for the public inquiry, and also answered various questions from new incoming Post Office employees and their chosen partner, KPMG, at the time, there were all sorts of things that we were providing responses to, and good responses. But we had a few things in the back of our mind which were, "that doesn't sound quite right," or "we should probably look into that." So at the time, we just made a note. And then when those pieces of work came to a conclusion, or quietened down anyway, the decision was, now we should spend a bit of time looking at how we can make some improvements that suit us, that improve the ways we work, so that if we explain anything in the future in certain areas, we would do so far more confidently.

So I'm going to talk about just four of the streams. These are the four that I mentioned at the last all-hands. In essence, they relate to the use of TFSNow, the use of Peak, the processes that we use when we use those two systems, and the processes that connect the two of those ways of working together, because they align, certainly for incidents and investigation-type work. And then how we use the systems to then drive the decisions around certain key meetings that we have, like our Business Impact Forum, the Customer Business Impact Forum, and something called Horizon Defects, which I will explain later. But the goal here is to find ways to use the systems in a more structured way, whether that be usage instructions or processes, so that we can rely on the content in them and use that to drive reporting on progress, direction, trends, activity, and so on. Because to some degree, that was not happening well enough. I'd realize, in part, it clearly is, because we're able to work every day and the teams function well. But there were certain bits where it wasn't that clear. And I'll explain some of the key differences or changes we're making.

It is all documented. Currently it's kind of a working document. So as we've had discussions about the observations made, some of those observations proved to be wrong so we crossed them off. New things came up because we were talking and we've been building a picture of what we would like to evolve to become. That is documented. That document is on one of the team's channels. I'll post the link after this if you've not already seen it so that you can actually take a look if you wish. You don't need to though because

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the intention is that all of the content that we have written during the discussions will become part of a new piece of collateral for live defect management, which is really the heart of how Peak helps the account, and then other things will be embedded into other documents that are relevant to your teams and the things that they refer to when doing their work. So the intention is not that the document we wrote that captured all of our thoughts, good ideas and actions is the only place this will be referenced. It's going to be embedded into the standard procedures that you hopefully use in your own teams or areas of work.

So the emphasis here was about getting process agreement and consistency. It became very apparent to me, certainly in the discussions I was having, that although there was quite a lot of common ways of working, there were certainly a heck of a lot that were down to how people had chosen to work because they'd been on the account a while or they'd done different things. And it wasn't that anyone's doing anything wrong, it was just it was different and that makes it very hard to then rely on the content in the systems because you can't be certain it was created with the same intent or by the same process. So we needed to get a process agreement and consistency in place because that way we are working in a defined Fujitsu way and probably working better together, which hopefully is what will happen. Equally the use of the actual tool sets, TFS and Peak, was not consistent, and what we thought it did and didn't do and where we could get information from and the links between the two were not always as robust as they needed to be.

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So we were looking at changes there. Then the content of the things that we put into those systems, the incidents particularly, or defect entries and related notes, were also of varying levels of quality and scope and it meant that you couldn't rely on it. So we wanted the data to be integral itself so we could run reporting for management, so our own people, whether you're team leaders, managers or senior managers, it doesn't matter, the truth is you should be able to rely on the information out the system and be either reassured that everything is well or be highlighting areas that need a bit of attention and therefore things that, you know, we could improve. And we've already spotted a variety of things that seemed like gaps just from the discussions we've had so far, and I think as we get going we'll probably spot a few others and that'll just mean that we get, you know, faster, more efficient in different areas.

The other element of this is the customer is asking more questions. How does this work? What's going on here? And sometimes we're very happy to answer it but we're not confident in the data, therefore it takes a long time. So the goal here is to build confidence into the reporting we do to our customer so that we can more routinely share information. Because if we can involve them more in things we need them involved in, we can be more transparent, which is a good thing given the criticisms of various court judgments, but equally we can start to hold them a bit more responsible for things that they just allowed us to do, conveniently so, whereas they should actually be making a call and be guiding the outcome. So that was what was motivating us. It's about working our way, getting the data in the systems to be reliable, being much more confident in pulling reporting for ourselves, and much more confident in pulling reporting for the customer. That would mean if a future inquiry asks a question, we'd be much more able to answer very confidently. Whereas previously we had to cross our fingers just a little bit to stitch stuff together.

The diagram at the bottom is not new, it's a way of working we've had for some time. I would point out we're talking about Belfast and the HNGX focus for now. Post Office Cloud will come next, so we're not currently thinking about the ways of working in relation to Post Office Cloud. And the mission was, with Peak and TFSNow, to evolve rather than create a revolution. The tool sets are in place, they're embedded into most teams. The goal was, let's see if we can use them better rather than change them. That would just feel a little bit too onerous. So it's all about evolution, not revolution. And the picture at the bottom is just to tell a simple story that, you know, when somebody raises something that they think's not right or they need looking into, that is a potential defect. It's a TFS incident or it's an investigation Peak, which our teams then investigate and qualify. They may decide nothing is needed because actually it was a misunderstanding, or it may be that we need to raise a change, or it might be we need to initiate some kind of fix through our software delivery lifecycle. But at that point we've got a confirmed defect, so we've got something we definitely need to fix. That then needs to be scoped by the developers or architects, which then needs to go for approval to BIF, maybe on to customer BIF, on to PTF for targeting, out to the developers for coding, into test for checks, and through release and out to live. The difficulty was if we were trying to work out where are all of the different things, all of the incidents and things we've logged, where do they belong, which bucket are they in, which part of that continuum are they stuck at, which ones are the busiest, which ones seem to get stuck the most, if we wanted to speed anything up, where would we put our effort? And the changes we've been making are to allow the position on this flow to be much more clearly visible so we can decide are we happy with the way it's working or do we wish it to work a little bit differently? And that's what we've been doing.

So there are some new terms, terminology, that's come into play and it's important we understand it, otherwise we'll obviously be talking to each other at cross purposes. The first thing is Live Defect. This is something, it probably will appear as an incident, but it's, it'll be present on a live system. That's the first criteria. Not on a test system, an internal system, it has to be on a live system and it has to be, or appear to be, inconsistent with the agreed design or service specification. So it's not as it should be, in simple terms, and is therefore likely to need fixing. Now obviously at the early stages we don't know, we just have a suspicion. It's a potential live defect.

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And not until we have done the assessment can we be confident that it is or isn't one. But to be classified as a live defect, it's got to be present on a live system, inconsistent with an agreed design or service specification and therefore something we're likely to need to fix. That will appear in TFSNow and should have a configuration item added of LiveAffectingDefect, or a Peak, which has got the ##LiveAffectingDefect Collection added. We need to do that so we can differentiate the various other things that exist in those two systems and quickly spot those which are actual or potential live defects. And it does not matter if there is a workaround in place, it is still something to fix. The workaround is great news because it means that the impact is not as heavy, but we still have to declare it and still have to find a way to work our way through it and fix it. So that's one important new term: Live Defect.

The other is the Horizon Defects Review. This is a joint working group between ourselves and Post Office where we have to declare defects that affect or could affect branch operations. We have to report them weekly, discuss them weekly and the Post Office communicate them to the postmasters. And these are a matter of high profile because we were asked this question many times during both the audits and the inquiry questions. So, first of all, it has to be a live defect. And it can't affect a branch if it's not on a live system. But Horizon Defects Review, HDR as an acronym, applies if any one of the following three things are true. If what we're dealing with affects or has the potential to affect a branch financial outcome, then it's a HDR candidate and we use HDR-Fin for brevity. But if it could affect the way that a postmaster or clerk interacts with the system, so on how they use it, whether that be user interface, a report, or some function, then it's an experience impact so it's HDR-Exp for experience. Or if it affects a customer, that would be you or I as a member of the public in the branch. If the defect affects you as a paying customer and using customer then that is also something affecting the experience. Those have HDR-configuration items and collections depending on whether you're talking TFS or Peak. And again I realize it's a manual tagging system but we need to do this so that we can very clearly pick out those which we feel we should disclose to the customer, Post Office, because they need to disclose them to their postmasters. And actually, if we fix those fast then we aren't affecting the day-to-day operations of a branch and that's really, really important, and again we're required to disclose them. As before, it doesn't matter if there's a workaround. Hopefully there is, but it doesn't matter, it's still a HDR defect if it is in relation to branch function. And it doesn't matter whether or not it's still suspected or if it's been confirmed, we have to declare it. And we've been doing that on lots and lots of Peaks and a number of TFS tickets to make sure that we've got a good view that we can share with the customer.

Just to give you some indication of scale, there are approximately 18 that we have recently deferred from releases. So they are defects that we were permitted to go live with. And on top of that there are approximately 12 others that have been identified in the course of working through incidents, of which about half of them are related to PBS because of its partial rollout and therefore an expected number of defects would occur. So we're not talking about big, big numbers but they're all important.

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And this is just the same information compressed together, because you may see it in this written form in some of the communications you've had from your team leads and managers, and you'll certainly start to see this phrasing in documents that will be published.

So I guess other bits. So Horizon Defects we've covered but it's a key new term, it is this joint working party with the customer. Investigation Peaks. The Peaks can exist for all sorts of reasons as you all know. There are release Peaks, there are all sorts of different things that help us run our business. But the key ones for me would be it's an Investigation Peak if someone's logged it because they believe there is something wrong, it's an incident, and we're still figuring out what's going on. It probably will have a Peak call type of "L", but we're still in the investigating stage, we do not know for sure that it is in fact something that is not right that we should be responsible for.

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The big thing to point out though is it is not allowed any more to simply create a Peak that describes something that is wrong that Post Office should know about and not raise a TFS incident, because that means they will not see it, and that's not in the spirit of the way we're moving. A Defect Peak is still the Peak system, it's still a Peak ticket. But this is when we are confident, we know that something is wrong, and we now need to set about fixing it. It will have a different call type but it will be something we are going to take through the various forums and processes we have that take something to Deployed to Live and Fixed. So it's different to an Investigation Peak where we're still looking into it.

And then if it affects the Live System, which the important ones will, again, you've got potential live defects which is something that is on the Live System is inconsistent with the design or agreed service spec, but we aren't sure; and Confirmed Live Defect where we are sure. And for a Confirmed Live Defect there will be a Defect Peak. And for a Potential Live Defect there will probably be – well, there will be an Investigation Peak and perhaps TFSNow on the linked incident as well.

I'll skip the OTI bit, but KBA, once upon a time we had the acronym KEL. We are completely removing that language from our vocabulary as fast as we can because it is no longer a fair and accurate term. It's title, Known Error Log, would imply that everything is a known error, and it isn't. Many, many of the things in the database are actually support, hints, tips, guidance, how-to's, all sorts. They are knowledge base articles and it is a knowledge base. So we wish to remove and decommission the acronym KEL as quickly as possible from as many things as possible and move to a more appropriate description knowledge base article. So I need your help to do that. Although I think if you've been here a long time certain words become habit. But if we can slowly break them that would help.

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So a picture to help tell a story. Let me see if my mouse is working. Okay, so a scenario could well be that the customer has created an incident in their service management platform, ServiceNow. They have determined they need our input, so they have bonded it, causing a Fujitsu TFSNow incident to be raised. The two teams -- Mac in that particular case if it doesn't need to go any further, and the customer -- can interact and the updates will flow between the two systems. There is a technology that does that. If our incident needs help from third or fourth line, then we will pass that on to a Peak resolver group and that creates a Peak. This is an investigation Peak to have a look at something or to delve a little bit deeper. It will have a call type of “L”, live incident, if you know it by its longhand. And again, updates made in this Peak will flow into the TFS incident, will flow into ServiceNow, and backwards and forwards that goes. It is possible to apply updates to the Peak that don't go through that interface, but mostly they do. And that's on purpose so that we can actually work, in essence, seamlessly, transferring status and hearing feedback from the customer, and it all flows through.

At some point, we are going to come to a conclusion about this Peak. It might be No Fault Found, misunderstanding, in which case you can close the Peak, which should see the incident closed, which should see the customers close their incident. It could be that we actually now need to decide to make a fix. That is, in fact, a defect. It is confirmed. At this point, we are going to clone this Peak and create a mirror of it, but it will be a Defect Peak with a different call type #Defect-Identified. And we do that to break the association of the Peak we're now going to take through our processes and its integration with TFS and ServiceNow. So having created this copy, which is the fixing defect, the Defect Peak, we can then put the reference into the Investigation Peak, close it, the incident can be closed, the ServiceNow incident, if Post Office want to, can be closed, because there will be a reference at the end of it which says we have confirmed a defect, its reference is PC 12345, and that's the one we're now going to take through our processes. But any updates we make to this Peak will not be synchronized with any other platform, it is Fujitsu internal, as we take it through our processes.

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The other thing to point out, I know that testing, even in release, anyone in the team may say, “Hang on, can you look at this for me?” and just create a Peak. It is mostly where the third and fourth line teams live and function and the architects, and that's okay, we can still create an Investigation Peak for ourselves. However, if it describes a condition that Post Office should be aware of, you must stop. It must be created in TFSNow, it can then be referred back into a Peak resolver group. The content would need to be copied across or reapplied by the person who raised this additional Investigation Peak, and we can shut that one down. The point here is, we can't have an incident we're working on that the customer should know about, where there is no flow back to them, or to our primary incident management platform, which is still TFSNow. So in those occasions, if the

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customer should know, you must stop and use TFS, which will create the link to Peak, which will see the replication.

If, however, the customer doesn't need to know, it's us needing to look into something for our own benefit, then that's fine, you do not need to create a TFSNow incident, you can continue to work as you currently do, getting teams and the specialist to contribute and working our way through. We may come to a conclusion that actually there was nothing wrong, we can just shut it, or we may decide actually that isn't a defect and we need to add that to our to-do list. You don't need to clone that one because nobody else, it's not linked to anything, so you can simply change its call type. And then what you have are a series of defects that sit inside our world that are not associated with any other TFSNow or ServiceNow tickets, which means we can progress them in our own way, at our own pace, until we fix it. Okay, so let me move on from there. Now…

MATT: Steve.

STEVEN BROWELL: Yes, hi Matt.

MATT: Sorry I was a bit late, GRO GRO Anyway, I'm just wondering, we're missing a number of the release managers, is this recorded in any way?

STEVEN BROWELL: Yes, yes it is.

MATT: Okay, you're recording now, okay, that's good.

STEVEN BROWELL: I am indeed, yeah.

MATT: All right, great, sorry.

STEVEN BROWELL: Just in case it would help…No, no, no, I've recorded them all so far, you never know, it might just be helpful.

MATT: Yeah, I mean they're busy with customer stuff, running releases and stuff, so that's why they –

STEVEN BROWELL: Who could do that? How come that's a priority? Highly understandable.

MATT: Okay, good, all right, thanks.

STEVEN BROWELL: Yeah, all right. So the first stream was really focused on TFSNow in relation to incident and problem. I think I've already made the point that if we're working on an incident POL should be aware of, it has to be a TFSNow incident and it has to be bonded, so that they can be kept up to date throughout the course of whatever it is that we're doing to bring it to a conclusion. But the more important thing we've done is we no longer add Knowledge Based Article references or Peak reference numbers into the body of the TFSNow incidents that the Post Office see. We clearly still have those links but they are private Fujitsu references. And the point is, the body of the incident should contain all of the relevant information to allow the customer to understand what's going on and what appropriate action needs to be taken. They should not need to ask us for a copy of a KBA or a Peak in order to supplement what is going on in a service management tool set to come to the right conclusion. So we are instead adding the relevant bits of a Knowledge Based Article into the body of either the TFS incident or the Peak. And if there are associated Peaks then we add the body of the content so that the information that flows through the systems makes sense in itself and we cease the need for the customer to ask for copies of entries in systems which are ours. And that's an important distinction and the Mac team will be keeping their eye on that and making sure that we stick to it. That only relates to bonded incidents, by the way, so if it isn't bonded to Post Office we can continue to work exactly as we would see fit. But just be aware if it is something that is linked to a ServiceNow incident the Post Office is tracking, we are not going to be adding references to KBA numbers or Peak numbers. We are going to put the actual content in there so they do not need to know that we're using different systems to run different ways of working.

A few other comments here. The Summary field, which is the quick description, it's also called the Summary in Peak.

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Because we're now going to do increasing amounts of reporting out of the system that people at management levels and even at the customer level will see, the ask would be if you can please make it as clear a problem statement as you possibly can. I've read some, I don't understand what they mean. You may do, but sometimes I don't. So my ask would be, to the extent that it's possible if you're creating a new entry make it something that everybody would understand not just you.

Equally, avoid providing updates independent of the systems by email and such like. Please instead embed it within the Peak or the TFS ticket such that that is the full and complete record and we avoid Post Office thinking that if I don't like what I read or I want more information all I need to do is give somebody else a nudge and they'll give me their view and that's the one I'll act on. I'd rather it was in the system, or systems, and that that is what people were looking at. We all have a common understanding at that point.

And the other one, is less qualified individuals are going to be reading all sorts now, and I've read many incidents in both TFS and Peak recently, and I confess I sometimes don't really understand what's going on. And I'll put that down to lack of skill in part but sometimes it is just so terribly worded that unless you were the person that wrote it, it isn't clear. Just be aware, lots more people are now starting to pay attention and it would be great if the language and style of writing considered the less qualified were reading it and it was more helpful in that way.

And then there isn't a particular field in TFS that we can use to give a succinct single summary of what's going on. Which means therefore you've got to read the summary, you've got to read through all of the entries and come to what you think is your conclusion. And that sometimes is wrong because of course you're not as close to the details. So the ask is, not only write things that are slightly easier to understand for anybody but don't be shy of embellishing an update -- rather than just check "looks okay to me" -- with something a little bit more rounded that if somebody read that would go, oh, I get it. So you may have to say, "I've now checked this, this, and this, and this looks okay, I think the next sensible thing to do would be to pass it on to Fred," or someone else, because it makes sense then as a reader. So just be aware, if you can help the ignorant like me understand something, then please put a few more moments in and fill it in because it will really help. It also avoids Post Office asking additional questions when we could have nailed it first pass. So that's the ask. Mostly it's about making sure that we don't work on incidents that the customer doesn't see, if they should see it, we keep the content of the incident as complete and integral in its own right, and we use, to the extent that we can, plainer English to avoid misunderstanding or follow-on questions. Sounds simple but it's important.

There are various other things that we can do with the system. If it's bonded you can't touch category and subcategory or you'll break it, the bonding breaks, so we don't do that. I don't think the system will stop you; however, I don't think it's something that most people would do, but it's just a word of caution.

We do have open and closed categories. If you're in Peak, you're very familiar with closed categories or response categories. Not so much in the case of TFS. But we're going to increasingly use those to get better visibility of where our problems typically come from. Problems with a small "p", incidents, as something logged, so we can start to see where we should focus our attention.

And we've added some new configuration items for the LiveAffectingDefect and for these Horizon Defect Review candidates, so that we can tag things and make it more obvious that they need to be considered.

The State field is also important now. That's a field that allows you to say, I think it says, open, work in progress, researching, acknowledged, suspended, fix in progress. There's various values. They're important. This field is not new, it's been there forever, but the great thing is it allows us to work out from the earlier slide where you are on that continuum. Is it being investigated? Is it confirmed? Are we in the fix stage? Have we fixed it? When did we fix it? All of that becomes you know trackable. So that field becomes much more important.

I'm going to do some work around suspending of incidents because we've allowed things to linger and I don't think we need to. So we're working on some rules that would give us permission to close those suspended incidents which are of no value to us to leave open. So we will not necessarily leave them open just because Post Office wants us to. We will clear down the system so that it doesn't clutter. And obviously there will be various work instructions and local procedures updated to reflect these comments that I've just made so you don't have to remember the slide where this is just a summary of the things that we're doing.

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Dive across to Peak now. There are some new fields in Peak. Depending on what you do, you may never need to fill these in, so if you're in investigation phase or you're in the kind of third line, early fourth line teams, then the first few fields, the first three are probably more relevant. But we are now able to capture the POL Problem reference. So if we know that Post Office is tracking this Peak, perhaps because it's a defect that is on their watch list, we can associate it with their reference number, which is helpful, because it means at least we can see that they have an interest, and when we provide reporting, they can quickly associate the report with their own views.

We now also have our own Problem reference, because as you know, although TFS incidents can be linked with problems, Peaks can't, so we've enabled a new field which allows Matt Hatch to see the association of a Peak to a problem record that he's working on, which is also helpful.

And then a new field, Workaround. We've always looked for workarounds, and if we've come up with any we've written it in the body of the messages and updates and we now have a specific field so I can query it. So if we have managed to think of a workaround that mitigates the pain that people are experiencing, the field needs to have a yes/no in it. Well, a yes if you've got a workaround, a no obviously if you don't, so we can query it.

And then another tab, which I think for many of you on this call the Release Management tab used to be quite light, it only had a few things on it. Well, we've made some changes, and sorry if this looks quite small, but don't worry, if you go into Peak and click the top righthand tab, you'll see it. The changes we made were to allow us to capture mostly things related to BIF, Customer BIF, and PTF. So the dates of those meetings are held at the bottom, and the discussion or the outcome of each of those sections is written in the bigger boxes at the top. The point was to move more towards the system has all the information in it, and to build the picture we don't have to open separate minutes to see which ones were discussed, to see what the outcome was and what the next action was. It should be attached to that Peak in the system. I do acknowledge that sometimes putting a

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set of minutes or at least an outcome together is helpful, but the purpose was, the system is all seeing. We do not need to try and stitch Excel spreadsheets, Word documents, PDFs, things on SharePoint sites, to the things that exist in the platform we use to manage these things.

And the other thing we did is… Most of these edits, by the way, would be done by those that chair the meetings that we're talking about. Many people would have no cause to need to edit this section at all. This is a BIF chair, PTF chair, CBIF chair responsibility. But the other thing is, to decide what goes to customer business impact forum tended to be discretionary. It probably was largely consistent in the way it worked, but it was never entirely sure why. So we have decided that a set of specific conditions, if met, will determine whether we need to bring it to the attention of the customer. And if any of these conditions are met and they can be ticked, the system will record it. So we will know that it was a candidate that needed to be taken to our customer business impact forum. Again, we can see by system query, what should have got to what forum, what was the outcome of each one, what date did it happen? And it's all there and we can start to query it and use it to influence how we move things along that arrow continuum and how we actually drive things from beginning to end.

There are some new field values in Peaks. The fields aren't new, but there are some additional choices in the dropdowns that you would use. So Call Type never used to have "#" Defect Identified. That's the single new entry. This is for those defects that will probably have carried that live defect tag for some time, but this is when you've decided this is definitely something that needs to be fixed. So we are now either cloning the Investigation Peak or changing the attributes of a Peak we raised internally. And those are the ones that we need to manage through our process as fast as we can. So having confirmed the fault, our goal is to fix it as quickly as process and rules and so on allow us to. But we ought to know that it's progressing at a pace appropriate for its severity and the constraints that we have upon us.

Collection is an existing field. There are actually three new values in there. One is this ##LiveAffectingDefect. So the moment you think this is present on a live system, is inconsistent with the design or service specification, and it looks like something we would have to fix, give it that collection.

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Equally, if it could affect branch operations, whether that be financially or by the experience we create for a postmaster, then add one of the HDR collections too, because that will drive reporting another activity. You're not alone in doing that, by the way. There are various crosschecks happening constantly that may spot something and come back to you as the originator and say, "Does this affect branch operations? It would appear to, based on other criteria we're querying." So I know it's manual, but there's various crosschecks. These are also double-checked when it arrives at a BIF meeting. So

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that is checked, [PH 00:35:37] Mick, currently, who looks after that for us, will challenge those people bringing a Peak to BIF and say, "Should it have these attributes on it?" And if it doesn't, if it should, then they can be set so that we keep the system in the right state. Same doublecheck, I think, happens at PTF2. So there's various points at which people's best efforts are doublechecked in case they missed it, because people will, and that's not a failure. It's just it'll take a while before it becomes habit. And sometimes you're thinking, should I, shouldn't I? My recommendation, if in doubt, put the flag on, put the collection on. I'd rather take it off because we decided you were being a little bit pessimistic, than realize we missed it because you were being optimistic. Better to work the other way around for me. So if in doubt, put it on, and otherwise leave it.

There were two values in target release, which we are quiescing, so Requested For and Released At. And I do that with some confidence. There are only, I think, three Peaks in the whole system with one of those values on them. So as something not used, that was just a cleanup opportunity. So Requested In, Proposed For and Targeted At are the predominant ones that we will police in order to see things move from start to finish.

Some fields which have been there forever are really important now because we're running reporting. So Call Type clearly is because that's where I spot the defect identified, the # Defect Identified setting. The Summary field, because that's the thing that succinctly, hopefully, describes what this is about. Impact, which there's a tab at the top called Impact, and we're hoping eventually to do this for all, but for the minute we're only doing it for the Horizon Defect Review Peaks. This is very, very few of the total. We are writing content to describe the business implication, the status and the next action. The theory is, this is a sufficiently succinct description that the person reading it will feel informed and have an unlikely need to ask more questions.

And if I can just find the one that's the magnifying glass, and I can't remember if it's that one, I'll zoom in just briefly here to give you an indication of the kind of things that we will put in there. The audience you have to consider is a very senior manager or the customer. Would it make sense to them? Does it show us in the best light? Does it clearly articulate what we've done and what we're doing next? Does it give confidence we are in control?

Now what happens is, if you set the HDR collection, then it will come up on a report that we run. And having done that, then I will take a look at this text, and if it's not as good as it could be, I'll work with the person or one of the team will work with the person and help them write it better. So don't worry if you missed it, we'll catch you when it's relevant, when we're going to have to use it in external reports.

Priority has always mattered because that should drive our behaviour and pace to fix and obviously if we put a workaround in that gives permission to lower the priority.

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Assigned Team matters because I'm going to chase them if I think something's not right. So if it's in your stack and it's not yours, hand it on, so that the person who should be doing something has it.

And Product Group and Product are just attributes that allow us to start to see where we have the more problematic areas in our system and therefore we can start to make some other decisions. So those fields become important now and I'm hoping we can get them filled in a bit more often with a bit more attention to accuracy.

This is an example of some information we now share with the customer. This is the Horizon Defects Review report from about two weeks ago. Again, if I zoom in because it might be slightly harder to see it, let me just go up here. So they get the Call Reference, that's the Defect Peak reference, the Summary field, which as you can see, it's important that it makes sense because if I read, “FAD…”, that doesn't mean a thing to me frankly. To a specialist that's probably incredibly helpful. I would add that's probably been derived from a Post Office created incident. We didn't choose it, they did, maybe it makes sense to them.

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But you can see sometimes how somebody reading it cold might go, "I'm really not quite sure what that means." But we do share the workaround, where there's a workaround, and then we share a version of the impact field that describes what's going on. I think the previous example took the second one down on the list, but there are others. The point being that we try and succinctly summarize what is going on. And that's what they get. They don't get a copy of the Peak. They don't get a copy of any Knowledge Base Articles. They don't get a proper copy of any problem records. They get the summarized description in the Impact field plus the Summary field that describes it. They may ask more questions, but the skill comes when they don't. That means that we've done a sufficiently clean job of explaining what's going on. And the only thing left is, where are we up to? So all you'll get is, I mean, these top two have got releases targeted so we're just waiting for those. Others may need a bit of chasing. This particular one is pending a customer decision, but it's in their camp. We can do nothing. We are waiting.

Some other fields that are important. Root Cause, that's really helpful, tells us what the conditions are that seems to be what type of fixes do we seem to find ourselves having to do. Been there forever, that field, not always used in the same way. So we're seeking to make that a bit more consistent. And there are certain values for that field, which for me denote No Fault Found. So actually when these settings are on, and I'll summarize them on the next slide, it's really important because it gives me permission to qualify them out from things that we need to disclose as being things that are actively being worked on. And that's not to chicken out fixing them. That's just a fact. Sometimes you come to the conclusion that there is nothing wrong, that it was caused by a condition that is not us or the system, perhaps the user, perhaps a poor instruction or something of that like.

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And there are also Response categories, which they vary from open to pending to final to closed. Open means it's just been raised. Pending, somebody's working on it. And there are many pending states, all of which can continue to be used just as they already are. That would put it eventually into a Ready to Release. And actually, Release Management should be moving the status to one of the final settings, followed by the call logger then deciding to close it. And just the same way, there are some which means, "Our conclusion is no further action was required, and therefore we consider this to be no fault found." So we will take those off our tracking list. These are not new values. They've been there all the time. I'm just picking out the ones that from the application support strategy are denoted as No Fault Found.

There are various field values here. If you use one of those, because the Peak does not make its way through to implementation, testing, etcetera, then we will be taking these off the list as qualified out. So they're in there as well.

And then the final part was to make sure that when we run our meetings, our BIFs, CBIFs, PTFs, and this Horizon Defects Review Meeting, we are driven by the system. The data in the system determines the action. So if it's going to BIF, it'll have a BIF action on it. If it's a Peak that's been declared as a defect, and for some reason it's not been to the Business Impact Forum, then I find myself thinking, I realize we could still be scoping the job. We could still be figuring out what we're dealing with, but I think we should hurry up. So sometimes the flag will be set to force the discussion so that something does not get stagnated at an early part of our process because somebody forgot to set the flag. So the system may now force the flag on, which means I know BIF will find itself having conversations sometimes with things that aren't ready. But the good thing is it means that we don't have things stuck in a process and not moving. To give people a nudge might be helpful.

You've seen that we've got some criteria that now determine if it goes to customer BIF. That will be asked at BIF. You don't need to learn them. But one thing to point out is, if you were familiar, we do no longer use the number of man days to determine whether we should engage the customer. It doesn't matter if it's a 1-day or a 50-day job. If it needs fixing, it needs fixing. Whether or not we fix it in which release, then the size of the job becomes important. But the customer doesn't need to make that call. It just needs fixing. So we don't use that as a deciding factor anymore.

The other intent is that if we bring something to the customer business forum, we will do so with a kind of mini proposal. We have got one, which we've piloted once. We've not had any Customer BIF nominations for the last three weeks.

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But the point here is, we wish to articulate what it is that we want the customer to read and on which we require them to make a decision. What we can't do is try and open up a Peak, make sense of it on the fly, which to be fair takes some skill, followed by an SME discussing various pieces of content and supplementing the understanding. And then the customer comes to a decision which is based on nothing recorded in our systems. So we're going to change it and make it like a mini CWO, if you will. We'll just put it into a structured format with a version number. The customer reads it, gives us a decision, at least we know they read version 1.1 and they said yes or no. That would be the intention. So it's clear what did they make the decision on. It then moves obviously onto PTF along with anything else that came straight out of BIF that didn't need to go to the customer. And the intention is that the dates of the meetings and re-presentation of Peaks at meetings and the notes related to that Peak in the meeting will be in the system such that we can go and query it and check that in the future if we ever need to. And if we have to share anything with the customer because it's Horizon Defect Review qualifying, it will come from the system. The flag, the collection will be set and other status information will determine that it needs to be brought to their attention and we will take the summary field, the impact field, and we will present that content to the customer. And they will then be able to track what's going on and we will give them updates weekly.

But the good thing, the other side of this is we can now say to the customer, “Actually we've given you the information why are you not using it?” or “You seem to have a misunderstanding of status. Is that because you didn't read what we said?” And I've come across that so often. But the confidence in our data, the confidence in the report that we share with the customer means we can hold our head high and say, “We've told you the state of things, please refer to it, and if that's not what you need, tell us and we will supplement it next time.” But we can avoid this they think they know something, or they're tracking it from a different reference number to us, or they've got an update that wasn't in the system that they heard from whoever they spoke to last, we can break all of that and put it into the system and drive it that way. And that's how this kind of comes alive. That's another copy of the report.

The stage we're at right now is explaining the changes. Some of you will have heard bits through your management team who’ve been helping with the discussions already and some of you who've very kindly been helping put right some of the data and entries that need to be brought to the new standards, if you could call it that, for the consistency that we now want. There have been lots of those and I've been a proper nuisance. But hopefully if we catch up with all of that, then there'll be far less of it because we'll fix it at the point of logging and the point of transferring it along to the particular forums we run. So that's a kind of one-time activity. Once we've done that, we need to embed it into the documentation that drives the way you work or is a statement of how it should be done. And then we need to challenge and encourage our staff to work the new ways, because if the data is put in the system and the processes are followed, then actually we won't need to police it too heavily. So that's where the effort really is going. And the sooner we get to that, which I'm hoping we can get to imminently -- I think we're mostly through many

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of them -- but if we can get there in the next week or so, then I think we can start to rely on some of the reporting. Wendy wants to put some in the management packs that she has, Dan wants some in his management pack to go to Wendy, of course, so that we've got succinct views. Not to catch anybody out, but to be honest about whether it's working or not and find out where the process blocks are and things that need to be done. And then we can start to be more confident and formalize some of this reporting with the customer. Because they're not that great at this, by the way, and I think some of our content is far more reliable and dependable and gives a much clearer picture of what's going on. But there's the goal.

Now, what I didn't do in all of that was personalize that to your particular team area or responsibility. And I guess I'm dependent on your management and leaders helping me do that and the documents that get updated. But in terms of an update of what we've been doing, that's my conclusion. And if there are any questions, please feel free to ask. Even if you've spotted something that you think "that's just silly," please say, because you might be right.

MALE: Thanks, Steve, has anybody got any observations? Silence.

STEVEN BROWELL: It's normally like that. I've said a lot and I'm just going to close this off.

MALE: I mean, the reality is once you start using it you'll probably…well, for those who are using it you'll…