

2012 / 13 – Pre Year End PDR

Rod Ismay

Overall Section Comments

I believe this has been a good year for me in terms of overachieving efficiency plans, bringing dynamic new blood into the FSC and improving the bond between staff in London and Chesterfield.

In the first half year, I laid a clear foundation for the transition to Finance Operations and the Finance Service Centre. I also ensured operational continuity against a backdrop of significant change. I did so with a focus on engagement, team working and positive mindset.

In the second half, I have managed the FSC through to full migration as planned. This has enabled new and earlier efficiencies through a process structure and has increased people's appetite and confidence to move around.

Highlights of my year are:

- Momentum – migration into FSC and team-wide appetite for next phase already
- Communication – consistent and positive, ensuring deep buy-in to the process structure
- Efficiencies – 14 heads reduction against 7 target with momentum continuing to grow
- Accounting & Reporting Team – dynamic recruits who have been praised by my peers
- External engagement – leveraging the ideas of new recruitment agencies and universities
- Exits – concluding a difficult bullying & harassment case, with the appellant resigning
- CWU (and Unite) – praised FSC culture, openness to joint working and delivery against plans
- Business continuity – maintaining service and control despite several serious IT incidents
- FLT / FLG evolution – seeing my stances on objectives, appraisals, comms and development become core to the workstreams and to FLT priorities
- FSC Lead Team energy – current lead team has highest energy yet. Real accountability and drive
- JFSA – praise from Chairman for “The Ismay Report” and being able to continually rebut claims
- CSR – internal and external engagement during Olympics. And now ExCo member support for my 2014 Tour de France plans (linking Comms, NT, branches, Mails and new YourCharity model)
- Earls Court vision event – chosen as sole Finance representative for zone hosting

I have ensured clear, well communicated objectives throughout the FSC. My management team and I have built on these at regular intervals to ensure a common understanding and line of sight to Finance strategy and the wider POL strategy. We have been recognised by SLT peers for best practice in our use of the Post Office Story framework to drive engagement.

I know that some of my interactions with peers could be more effective and I have taken on board SLT Development feedback about influencing, understanding and coaching. I have built a longer term PDP from this and have taken steps towards it this year which have paid back in a number of ways eg. external relationships, fresh insights and helping to get more open minds across the FSC amongst staff who have often not worked anywhere else. I have modified my style during key meetings when I can see things not working and this has helped in FLT, Operating Board and in what is broadly agreed as a challenging interaction with the Second Sight “JFSA” investigators.

Our CWU representatives have continued to acknowledge the positive culture and involvement which I deliver. I have facilitated greater engagement with the CWU and I am pleased that the administrative staff response has effectively been “thanks but we don't need the union.” This is a positive endorsement of management in my unit.

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Demonstration of Care, Challenge and Commit

I believe that I lead in Finance in terms of how I live out the POL behaviours and how I work with my team to ensure that these behaviours are explicit in our plans, our reviews and our Team Talk.

I and my team have consistently been recognised by peers across Finance for our communication, our 2 way engagement, our objective setting, our performance management and our joint work with other teams to bring the POL vision to life in Chesterfield.

Through these, I and my manager team create a framework of care for colleagues and customers, whilst challenging the norm and striving for continuous improvement.

My team are now partnering London colleagues well in workstreams to build on the good practices that have been in place in Chesterfield for some time now.

The evidence of my commitment to prompt engagement is shown in our long standing Team Talks (WTLL), our 121 processes, our measures, our ways of working with other directorates and the evidence in our stories on www.wearethepo.co.uk that show our care, challenge and commitment.

Additionally, I have had specific positive feedback from the CFO this year regarding my:

- Consistent challenge and lead at the FLT table regarding peer comparison and performance, and
- Being the most prepared and engaged candidate for the SLT assessment exercise in the Autumn

Performance Against Objectives

The results for myself and my team are set out in a single frame KPI pack which we track at monthly FSC Lead Team meetings. Headlines against my four 12/13 objectives are as follows:

1. Achieving targets – overachieved on staff costs and efficiency targets. Behind on card costs due to IT issues in migrating to new merchant acquirer
2. New value (strategic change) – project managers satisfied that FSC has met its commitments in enabling business wide change initiatives. FSC has also freed up resource for secondment into Finance Roadmap and relevant IT projects
3. Finance operating model and independence – new structure deployed and efficiencies being achieved ahead of plan. CWU pleased to have been engaged. Clear, approved plan under way for final migration from agency temps to Specific Event Contracts
4. People, momentum and PO Story – FSC engagement scores have improved and remain significantly better than the rest of Finance. Tackled bullying & harassment scores and specific allegations, including joint work with CWU and Unite. Leading advocate for PO Story approach across POL and leading contributors of evidence on the PO Story blog site.

Lessons Learned In Last 6 Months

1. Tackle issues and opportunities earlier and in bite size pieces – in the past I have tended to seek one accountable owner and to present one all-encompassing complaint or idea to them which has overwhelmed or disengaged them. More recently I have focussed more on chunking things down, seizing selective hooks with individuals and gathering groundswell support. This has proven more productive recently on IT issues, stopping the misguided Sharepoint programme and initiating my 2014 Tour de France CSR proposal.
2. Be bolder – go straight to the top where it's the right thing to do, but with ducks in a row diplomatically along the way (eg. In IT incidents and TdF)
3. Mute button / shut up – don't wade in if the tide is going in my favour already (eg. FLT, JFSA)
4. Be blunter / crisper – cut the political niceties in Chesterfield. People just want to get to the point. (eg. Efficiency targets)

The lessons I noted at the half year, for the preceding 6 months, were as follows and what I have done about them is below:

- De-emotionalise some of my interactions in FLT – be factual, more objective, more selective about when to enter dialogue and use calm (repetitive) broken record technique if need be
- Talk and plan more in terms of outcomes and strategy as opposed to milestones and tasks – get to the point and describe the goal. Get people to describe how success feels.
- Redress my balance of time with FLT and with my DRs – I had become too remote from my team in H1 due to the extent of OR meetings in London. I have struck a better balance in H2 with selective use of conference calls more too
- Escalate updates more frequently, but very concisely – calls with Peter and selective notes to Chris

Expectations of others

- Be clearer on accountabilities and make constructive and timely challenge where needed – done so with IT, Property and ATOS where service has been unacceptable

Areas For DevelopmentPersonal Development Plan – Progress Against Previous Plan and Priorities Moving Forwards

I agreed a PDP at the half year which took on board feedback from the SLT assessment process. Key areas and actions I have taken are as follows. The most urgent of these, in line with my SLT Assessment feedback, feel to be my relationship management and the crispness of my commentary.

1. Richer and wider relationships within POL – tackled with IT, Property, HR, Network and Mails. I also ramped up my LinkedIn activity and have several unsolicited endorsements.
2. Personal interaction style – have focussed on more timely intervention and understanding hooks
3. External perspective – good links with recruiters and modified processes with their advice
4. 121's – better prep and use of interview themes more to focus on the person rather than tasks
5. Role in leadership groups – have attempted to play more of a role in meetings where I do not have specific operational skills to bear, by being more facilitative. Will explore CFO expectations
6. "What exactly are you asking for" – shorter, clearer requests which have enabled much faster engagement with IT this year when service has not been good enough
7. "Stay in the tackle" – I have done so with Property, IT and ATOS