

**ICL Pathway**                      **Specification of Pre-Entry Event**  
**COMMERCIAL IN CONFIDENCE**

Ref: IM/PRO/172  
Version: 1.1  
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**Document Title:**                      Specification of Pre-Entry Event

**Document Type:**                      Proposal

**Abstract:**                                      This paper contains a specification for a Pre-Entry Event for Counter Managers. The event will take place prior to their Counter Manager training and is targeted at those Counter Managers who need preparation to enable them to get the most out of the Counter Manager course.

**Status:**                                      Final

<b>Distribution:</b>	<u>ICL Pathway</u>	<u>POCL</u>
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## 0 Document control

### 0.1 Document history

Version	Date	Reason
0.1	27/8/99	Generated as a proposal following workshop on 26/8/99. Draft issued to POCL 27/8/99. Fagen review scheduled with S Grayston (POCL) 8/9/99
0.2	9/9/99	Amended following Fagen Review
1.0	17/9/99	No changes since v0.2 - number changed for formal issue
1.1	25/10/99	Timetable changed to move Post Office Counters Ltd notification of delegates to Week -13

### 0.2 Approval authorities

Name	Position	Signature	Date
Trevor Rollason	User Implementation Manager, POCL		
Steve Lovegrove	User Implementation Manager, ICL Pathway		

### 0.3 Associated documents

Reference	Vers	Date	Title	Source
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### 0.4 Abbreviations

POCL	Post Office Counters Limited
RNM	Regional Network Manager
PSA	Performance Standards Assessment
TAC	ICL Pathway Training Administration Centre

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## **0.5 Changes in this version**

1. Post Office Counters Ltd notification of attendees changed to Week -13

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## 1 Background

Acceptance Incident 218 has been place on ICL Pathway by Post Office Counters Ltd. The Acceptance Incident reads: "The Managers Training Course is not acceptable due to deficiencies in the accounting modules. In the live environment the training given did not equip the users to perform the completion of office cash accounts. This is a basic Post Office Counters Ltd function that is central to running and accounting for the Post Office Counters Ltd network."

ICL Pathway, as part of the clearance actions for AI218, has proposed to provide further investment to ensure the success of the Horizon programme. This takes the nature of a management of change event prior to the training event.

This is to be for an estimated 20% of outlets (3,770 staff/agents). This is based on a total number of 18,500 outlet installations. The event is targeted at those who may experience difficulty within the existing training programme (and who may be at risk of failing the PSA on first attempt). The aim is to bring these people up to a common level of awareness prior to the training events.

ICL Pathway is making 4,440 course places available (based on a maximum occupancy of 12 per course) which caters for the 20% of outlets as well as allowing for a reasonable contingency.

## 2 Overview of Proposal

This document contains the proposed specification for a Pre Entry Event which ICL Pathway will offer to selected Counter Managers prior to them attending the Counter Managers training course.

ICL Pathway and Post Office Counters Ltd both recognise that there will be a number of Counter Managers who will have difficulties in reaching the required level of competence to operate the Horizon system. This, in part, is caused by their unfamiliarity with automated systems which leads to nervousness and embarrassment and reduces their ability to gain the most from the Counter Managers course.

The Pre-Entry Event is designed for those Counter Managers who fall into this category. The event is intended to give users an introduction to the Horizon system, which will help to prepare them for formal training. It will allow them to ask

questions, discuss their concerns and have some hands-on practice on the Horizon system in a less threatening environment than the Counter Managers course.

ICL Pathway will require Post Office Counters Ltd to identify potential candidates. It is, however, essential that Post Office Counters Ltd are confident that the information held is sufficient to correctly identify the target audience as Post Office Counters Ltd will have to accept responsibility for concerns arising from users not identified by Post Office Counters Ltd to attend one of these events. This does not remove ICL Pathway's responsibility to train users to use the Horizon system to the required standard.

### 3 Constraints Surrounding the Event

~~The Horizon system will be installed in It is assumed that approximately 18,500 outlets will be installed with the Horizon system, ICL Pathway proposes that the Counter Manager from each outlet will be considered for attendance on the Pre-Entry event. and A maximum of that up to 20% of these Counter Managers will be selected for attendance by Post Office Counters Ltd. It is intended that ICL Pathway will deliver up to 370 events of approximately half a day in duration, for a maximum of 4,440,370 users.~~

~~All 350 of the Regional Network Managers will need to attend an extra training module in preparation for their support role. It is therefore assumed that Pathway will need to train all 350 RNMs on the 3-day HFSO variant of the Counter Manager's course.~~

~~The actual numbers of Counter Managers to attend the events will be determined as part of a review by POCL utilising data sources primarily from within POCL (e.g. Regional Network Managers, Business Support Management etc).~~

~~ICL Pathway will provide these events on a limited basis. While a maximum of 370 will be provided, ICL Pathway will run not more than four concurrently (one per IP Region). Part of the development work will define the optimum days on which these courses will run. Tea and coffee will be provided at the start and mid-point of the event. The event will be run in either the morning or afternoon of a standard working day (Monday - Friday).~~

~~The proposed event will last It is expected that the event will be have a duration of approximately three and a half hourshalf a day. It is assumed that tIt will be run for 10 to 12 users with each pair of users sharing a single terminal. on the basis of pairing, where two users are paired together around one terminal and between 10 and 20 users attend e While ICL Pathway would not normally encourage delegates sharing terminals, ICL Pathway feels that in this case it will help encourage discussion and boost delegates confidence. Pairing is a proven technique used to stimulate discussion, learning and confidence building through interaction.~~

Two ICL Pathway trainers will be allocated to each event. Given that a section of the event covers Post Office Counters Ltd business practice, ICL Pathway believes that it is important that a Post Office Counters Ltd employee deliver that section.

The events will be run as centrally as possible to the appropriate outlets, but ICL Pathway will look to Post Office Counters Ltd for guidance as to the preferred location. Post Office Counters Ltd must take the primary role in the selection of attendees. The Post Office Counters Ltd Region will define who is to attend an event and where the event should take place. They will then complete a booking form and forward it to the Post Office Counters Ltd User Implementation Team. They will make a copy for the purposes of monitoring and will then e-mail it to the ICL Pathway Training Administration Centre (TAC). Note that this e-mail *must* reach the TAC in line with the timescales detailed in Section 6. Once the form has been received, the TAC should liaise directly with the Post Office Counters Ltd Region on any issues to do with the event.

Delegates may be expected to travel further than the 15 miles stipulated for a standard Counter Manager course. Instead, a 30 mile catchment area as is used for the Management Infrastructure Briefings and User Awareness Events may be appropriate.

ICL Pathway wishes to discuss the criteria for evaluating the success of these events with Post Office Counters Ltd before agreeing any measures.

## 4 Timescales for Implementation

While the Pre-Entry Event is relatively high level, it will hold a key position within the overall implementation strategy. It is therefore important that it is fit for purpose. Achieving that will require careful planning and preparation and the involvement of Post Office Counters Ltd staff at every stage of the process.

Some of the information to be covered on the course must derive from Post Office Counters Ltd as it touches on business practices both current and future. The level of Post Office Counters Ltd involvement in the development and delivery of the course will be defined once the Pre-Entry Event is agreed in principle.

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Assuming that development of the Pre-Entry Event is authorised by 10/9/99, the timetable for development is as follows:

- Post Office Counters Ltd Authorises Development - 10/9/99
- Post Office Counters Ltd and ICL Pathway agree course specification - 17/9/99
- Post Office Counters Ltd provide their content input - 24/9/99
- Post Office Counters Ltd identify dry run audience - 1/10/99
- Development Complete - 1/10/99
- Dry Run to ICL Pathway - 4/10/99
- Dry Run to Post Office Counters Ltd - 7/10/99
- Amendment made - 11/10/99
- Course signed off - 20/10/99
- Event Ready for First Delivery - 1/11/99

The delay between the Post Office Counters Ltd Dry Run and the first delivery includes a 1 week period for completion of the acceptance process and a further 2 weeks to cover print time for handouts.

By Monday 6<sup>th</sup> September the majority of user training events delivered in support of 1999 installations will have been scheduled. Implementation of the event will not therefore be effective until January 2000. ICL Pathway recognises that the event is required as soon as possible, but sees in impractical to commit to an earlier date.

## **5 Individuals Failing to Attend the Course**

The situation may arise where individuals have been identified as needing to attend the event, but may not be available for the course they are assigned to. In this case the following steps should be followed:

1. The Post Office Counters Ltd Region should attempt to re-schedule the individual on an alternate event if any are available.
2. ICL Pathway will send the individual a copy of the event handout. This will be despatched at the end of the week that they should have attended their event. (Note that ICL Pathway will only provide a maximum of 4,440 sets of handouts for delegates, whether these are provided at events or are sent out by post.)

Should an individual who is not on the attendance list arrive at an event, they will be refused entry. This conforms with the standard practice used on all events provided as part of the Horizon programme. They will be advised to contact their Regional Network Manager, who will liaise with the Post Office Counters Ltd Region to try and arrange for them to attend an alternative event.

## 6 Positioning Within the Current Implementation Process

The proposed provisional placement of the Pre-Entry Event is as follows:

ACTIVITY	TIMING	RESPONSIBILITY
ATTENDEES & COURSE LOCATIONS IDENTIFIED	WK - 13	Post Office Counters Ltd
USER AWARENESS EVENT INVITES	WK - 12	ICL Pathway
SCHEDULE EVENTS/ ISSUE JOINING INSTRUCTIONS	WK - 8	ICL Pathway
USER AWARENESS EVENT	WK - 7	ICL Pathway
RUN PRE-ENTRY ASSESSMENT EVENT	WK - 4 / WK - 3	ICL Pathway /Post Office Counters Ltd
FORMAL TRAINING COURSE	WK - 1	PATHWAY

The timings are based on the start of “go live” at the outlet. The formal training must be carried out no more than 5 (five) days before “go live”.

## 7 Event Specification

Please note that this is a draft specification which is subject to agreement and discussion prior to the dry run of the event. The event will last between 3 ½ and 4 hours. Exact timings will be determined during the development period and confirmed at the dry run.

<b>Introduction</b>	
<ul style="list-style-type: none"> <li>• Welcome by Trainer</li> <li>• Venue administration – Fire, Smoking, Toilets, Breaks, Mobile Phones</li> <li>• State Main Course Objectives</li> <li>• Introduce Course Materials – Briefly introduce Workbook, QRG's, Exercise Training Folder, APS Cards and any other receipts etc</li> <li>• State Course Agenda with approximate timings</li> <li>• State policy on Questions, state that a Training Mode exists for use in the office</li> <li>• Any Questions?</li> </ul>	<b>ICL Pathway</b>

<b>Demystifying computers</b>	
<ul style="list-style-type: none"> <li>• Hardware Overview <ul style="list-style-type: none"> <li>• Briefly introduce each component of the system</li> <li>• What is a processor</li> <li>• What does the monitor do</li> <li>• How is the keyboard laid out, and what does each bit do</li> <li>• What is the bar-code reader and what does it do</li> <li>• What can you print on and what is the difference between the two printers</li> </ul> </li> </ul>	<b>ICL Pathway</b>

<b>Standard Balance Process Terminology</b>	
<ul style="list-style-type: none"> <li>• Explanation of Balancing terminology</li> </ul>	<b>Post Office Counters Ltd</b>

<ul style="list-style-type: none"> <li>• Suspense Accounts</li> <li>• Stock Units</li> <li>• New Balance Process terminology</li> </ul>	
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<b>Manual to Horizon Process changes</b>	
<ul style="list-style-type: none"> <li>• Overview of current manual processes <ul style="list-style-type: none"> <li>• Daily procedure</li> <li>• Daily / Weekly Summaries</li> <li>• ONCH</li> <li>• Cash Account</li> </ul> </li> <li>• Overview of new automated process <ul style="list-style-type: none"> <li>• End of Day procedure</li> <li>• Daily / Weekly Reports</li> <li>• Stock Units</li> </ul> </li> </ul>	<b>Post Office Counters Ltd</b>

<b>Familiarisation and Hands on in Horizon</b>	
<ul style="list-style-type: none"> <li>• Log on (username TCC567, password TCL1234) – key messages on training course <ul style="list-style-type: none"> <li>• Username is you.</li> <li>• Password for security.</li> </ul> </li> <li>• Introduce the Desktop menu</li> <li>• Mention 2 or 3 of the main icons and the icons around the border and stack</li> <li>• Mention Padlock, No Entry and three dots/bent arrow</li> <li>• Introduce basic navigation i.e. from Desktop to the Serve Customer menu</li> <li>• Introduce the Serve Customer menu</li> <li>• Mention the 10 most popular PO products and N Ireland icon</li> <li>• Introduce the Other Products menu</li> <li>• Mention the groupings of like products i.e. GiroBank, NS, Licences</li> <li>• Restate the Objectives for Getting Started</li> <li>• Any Questions?</li> </ul>	<b>ICL Pathway</b>

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<b>Question and Answer Session</b>	
<p>Free format session for delegates to ask any questions they have about:</p> <ul style="list-style-type: none"> <li>• the Horizon system</li> <li>• the implementation process</li> <li>• the business reasons for Horizon system</li> </ul> <p>This session also allows delegates to voice any concerns that have about automation</p>	<p><b>ICL Pathway</b> <b>Post Office</b> <b>Counters Ltd</b></p>

<b>Training Mode</b>	
<p>Demonstration and hands-on practice in entering, exiting and using training mode such that users become aware of the existence of training mode, the services and benefits that it provides such that when on the training course, if users feel they have not understood something they know they can practice it back in their own outlet using training mode. Also to make people sufficiently aware that they make best use of training mode.</p>	<p><b>ICL Pathway</b></p>