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HORIZON CAPABILITY RESEARCH

As you know Research Services has been continuing to collect data about user capability before, during and after Horizon training to allow us to identify gaps in capability over time and across groups (and to identify how we might fill these gaps). We now have the latest results from this work which I'm sure will be of interest. (NB: This note just gives the edited highlights: if you want any more detail then let me know).

Before attending Horizon Training :

Our research in April indicated that those going into Horizon training had an overall pre course competency of 79%. Our latest research replicates this exactly over an even larger sample (i.e. the existence of a large current competency gap has -again- been confirmed)

Attitudes to Horizon continue to be positive:

- with 81% of people looking forward to using it and
- 91% believing it to be essential for their office to succeed.

However, significant numbers of people are also concerned:

- 34% said that they were worried that they would find it difficult to learn how to use Horizon;
- only 38% believed that it would be easy to change from current methods;
- only around half believing that Horizon would be easy to use.

Two thirds were familiar with using a computer key board; almost half used a computer in their office.

There was a clear relationship between age , office type, previous use of computers and confidence about using Horizon prior to training (e.g. older users were less comfortable using a computer, less likely to use one now and less confident that the Horizon system would be easy to use)

Horizon training:

As I'm sure you know from other sources, the live trial participants had an overall competency test failure of only c1% but it becoming less clear that the

competency test used will actually measure competency in live use. Qualitative feedback collected thus far indicates a general level of concern about the adequacy of the training provided e.g. the length of training course and amount (and quality of) of support provided after training; amount of time devoted to areas such as balancing and inadequate time to practice during the training time; that the course didn't adequately prepare users for the live office experience.

Performance after training (i.e. in live usage) :

Much of this data is still being collected and whilst we can't yet assess the nature and length of the 'learning curve' and its impact on service, it is worth pointing out that there are already indicators of concern e.g. expressions of unhappiness with the time taken to balance and about the length of transaction times; concerns about Helplines etc. It is also worth pointing out that these offices were provided with a level of (HFSO) support that is not currently proposed for national rollout (see below).

Taking things forward:

There are two things we can conclude from the research so far:

1. There are capability gaps that can and should be filled by the business to improve both confidence and performance (although we won't know what all of these are until the final research is available);
2. That we can, to some extent, predict the types of people (and the kinds of offices that they work in) who will have difficulty and these people should be targeted for additional help.

This suggests several actions (a number of which are, I know, already under consideration). They can be summarised as:

Prior to Horizon training:

- improve user knowledge and understanding of issues that are fundamental (and which feedback has indicated are causing difficulties) e.g. the Stock Unit concept;
- provide basic best practice guides e.g. re balancing to help improve standards before change takes place

Training event:

- in amending the training event to take account of the changes re Benefits Agency transactions, use the time freed up to devote to areas of known capability gap e.g. balancing, and what to do if things go wrong and a

realistic simulation exercise; change the balance of training so that it better address the 'whys': feedback suggests that users would benefit from understanding why things needed to be done in certain ways (this should support conformance as well as reducing errors/helpline calls)

- provide additional documentation to provide 'what if things go wrong' guidance;
- rework the competency test to cover areas of known concern e.g. balancing. (This will need to be looked at any way once the post-training competency data is available);

After training:

- Support first balances (I understand that , with some rejigging, between 80% and 86% of first balances can be supported using current resource. This support should be targeted towards those areas of known concern
- implement software changes to support balancing (I believe that this is already in hand);
- documentation (particularly manuals) are perceived as being too complex to refer to during busy times: the opportunity to extend the use of user guides should be explored
- mechanisms to share best practice should be developed (particularly in larger offices e.g. 'top tips' put on the White board / note book of problems resolved: perhaps we could provide something to help to do this?

Perhaps we could speak about this soon? (I'm conscious that our lead times for national roll out are short and that many of the above recommendations therefore need resolving soon so that we would be in a position to have them in place for August).

GRO

Kathryn Cook