



ICL Pathway

ICL Pathway Field Service Manager -  
Role Definition and Overview

Ref: CS/PRO/124

Version: 0.1

Date: 13/09/00

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## 0.0 Document Control

### 0.1 Document History

Version No.	Date	Reason for Issue	Associated CP/Pin/CL No.
0.1	14/09/00	First Draft for comment	

### 0.2 Approval Authorities

Name	Position	Signature	Date
Paul Westfield	Infrastructure Services Manager		

### 0.3 Associated Documents

Reference	Version	Date	Title	Source
CS/IFS/008	0.2	07/07/00	ICL Pathway/POCL Interface Agreement for the Problem Management Interface	ICL Pathway
CS/PRD/081	0.2	30/08/00	End-to-End Customer Complaint Process	ICL Pathway
CS/PRD/021	2.3	04/09/00	ICL Pathway Customer Service Problem Management Process	ICL Pathway
CS/PRO/110	1.0	19/05/00	ICL Pathway Customer Service Problem Management Database Procedures	ICL Pathway

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## 0.4 Abbreviations

Abbreviation	Explanation
FSM	Field Service Manager
BSM	Business Service Management
MCVP	Management Care Visit Programme
HSH	Horizon Systems Helpdesk
PON	Post Office Network

## 0.5 Changes in this Version

Version	Changes

## 0.6 Changes Expected

Changes

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## 1 Introduction

This document is a working-level document that establishes the role of the ICL Pathway Field Service Manager and details the working practices to be adopted. It also details the points of contact with PON BSM, and the interfaces to other processes and procedures.

## 2 Scope

This document covers:

- the procedures to be adopted in identifying problem offices for investigation
- the methods by which that investigation should be completed
- the participation in the Manager Care Visit programme

## 3 Responsibilities

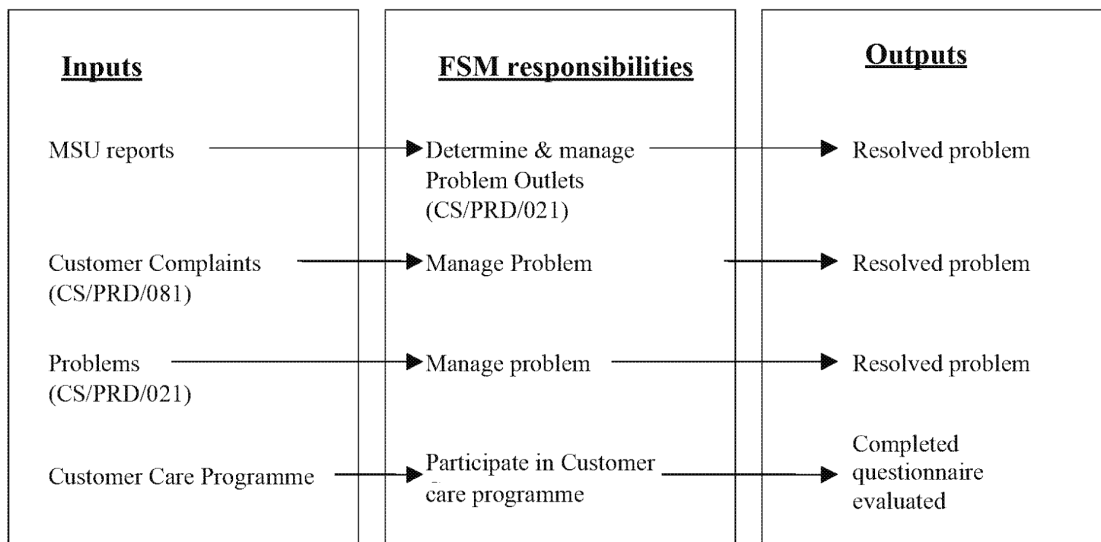
The role of the FSM encompasses both Problem Management and participation in the ICL Pathway/PON Management Care Visit Programme.

The FSM team is responsible for the proactive identification and management of system problems that affect individual Post Office outlets. As a result, the impact of these problems on Post Office outlet business will be minimised, and service levels/customer satisfaction restored.

Root causes to problems will be identified, and actions applied to ensure that the circumstances do not recur.

The FSM team is field-based, and geographically spread across the UK. Each FSM is responsible for an area of the country; where circumstances dictate (e.g. illness or holiday), an FSM may pass this responsibility to another team member.

The role operates within the overall framework of the ICL Pathway Customer Service Problem Management Process, the End-to End Customer Complaint Process, and the ICL Pathway/POCL Problem Management Interface Agreement.



## 4 Problem Management

### 4.1 Identification of Problem Offices

The FSM team will proactively seek to identify offices displaying indications of ICL Pathway related problems; this will be achieved through reference to various sources of information.

#### 4.1.1 Problem Office Initiation

An extract of the HSH Call Logs will be made on a weekly and monthly basis by the ICL Pathway Customer Services Management Support Team and supplied to the FSM team. The extracts will include the following information:

Each month: The top 30 HSH Call Incidence offices in each of the following seven categories, over the previous eight weeks:

Hardware; Software; Network; Operational; Complaints; Other; Authorised Reboots.

This incidence will be broken down into a weekly call rate, and will be further supported by an indication of the UK and Area average number of calls per office raised in each category. An outline of the call details will also be provided, together with details of when the office went live.

Each week: The top 10 outlets nationally in each of the seven categories shown above and their position in the top 10 in the previous week, together with the number of calls raised and the outline of call details. An example is attached at Appendix 1.

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The FSM will analyse this information for trends that suggest that an office is experiencing an excessive incidence of system-related difficulties, which are ICL Pathway's responsibility to address. Once identified, the details of the problem will be entered onto the ICL Pathway Problem Management Database (Ref: CS/PRO/110), initially as an ICL Pathway internal problem. Should subsequent investigation indicate that PON action is required to resolve the issue, then a cross-domain problem will be raised (ref: CS/IFS/008)

#### 4.1.2 Problem Office Referral

The Field Service Managers act as Problem Managers within ICL Pathway Customer Services team, with focus on individual office issues. As such, they may be appointed as Problem Managers within the terms of the ICL Pathway Customer Services Problem Management Process (Ref: CS/PRD/021) by the Duty Manager, in response to cross-domain problems raised by PON BSM.

Additionally, within the terms of the Problem Management Process (Ref:CS/PRD/021), responsibility for specific office problems may be passed to the appropriate FSM by any other Problem Manager (Ref Para. 5).

#### 4.1.3 Complaint Referral

The ICL Pathway End-to-End Customer Complaint Process (CS/PRD/081) details the possible sources of complaints. In managing complaints, the Customer Services Strategic Services team may need to invoke the Problem Management Process, and raise a problem. Where a problem is raised in respect of a site-specific ongoing system-related complaint (specifically type

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code Pathway MCO1), responsibility for the problem management should be passed to the FSM covering the area in which the office is situated, within the terms of the Problem Management process (Ref: CS/PRD/O21).

#### 4.2 Communication of Problem Offices to PON

Each week, the FSM team will pass to PON BSM a consolidated list of sites which have been identified as having potential problems, and which an FSM would wish to visit in order to assist with assessing the problem and identifying the appropriate course of action.

The list will include the following information:

Office, Fad, Fascia Name, FSM, FSM contact details, summary of current problem, and a suggested visit date

An example is attached at appendix 2.

The visit date will be not less than one week from the date that the list is provided to PON.

The Problem Management Database will be updated to reflect that the site has been identified as requiring a visit, and that this information has been passed to PON (Ref: CS/PRO/110).

PON BSM will communicate this list internally within PON, including to Security, Audit, and the Territorial teams, and respond within 48 hours. This response will indicate whether, exceptionally, there are any sites to which a visit is denied – e.g: ongoing security/audit reasons. Any such denial

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will be recorded by the FSM on the ICL Problem Management Database.

The response will also indicate if any PON representative wishes to attend the site visit, and contact details for that representative.

PON BSM will then contact the outlet and advise them that an ICL Pathway FSM will be contacting them to arrange a visit.

#### 4.2.1 Fast-track Process

Where exceptional circumstances arise, a site visit may need to be arranged urgently, without waiting for the submission of the next weekly visit list. Under these circumstances, a fast-track process may be initiated by either ICL Pathway CS or PON BSM.

The site details should be raised as a Cross-Domain issue to the relevant Duty Manager (Ref: CS/IFS/008). The ICL Pathway Duty Manager will assign any requests received from PON to the relevant FSM.

### 4.3 Policy for visiting Post Office outlets

#### 4.3.1 Visit Booking Procedure

Having received the visit list back from PON, the FSM will contact the outlet directly, and speak to the Outlet Manager.

The FSM will identify himself or herself as a representative of ICL Pathway, and make arrangements to visit the site to investigate the problem that the site is experiencing. A visit time will be agreed. The FSM will make clear the specific reasons for the visit and the areas that are being investigated.

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Where a PON representative has been indicated on the visit list, the FSM will contact the representative directly to inform them of the arrangements that have been confirmed.

If circumstances subsequently prevent the visit from taking place (e.g sudden illness), the FSM will pass responsibility for the visit to another FSM. If a PON representative is unable to attend, this information will be passed to the FSM with details of any replacement. If, exceptionally, the visit needs to be cancelled, the FSM will ensure that PON BSM and the Postmaster are informed, and an alternative appointment made.

The Problem Management Database will be updated to reflect the agreed visit details.

Where a further visit to a site is required, this will be added to the next visit list, and flagged on that list as being a follow-up visit.

#### 4.3.2 Office visit protocol

The FSM will visit the site at the agreed date and time. Where a PON representative is expected, the FSM will not commence the visit until the PON representative is in attendance.

The FSM will introduce him/herself to the outlet manager, and show evidence of identity, which the outlet manager can verify through the NBSC.

During the visit, the FSM will seek to identify any potential external influences that could give rise to the system problems, and gather all information relating to the circumstances under which the problems arise. The FSM will particularly be looking to identify any trends or similarities between

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individual occurrences, as a possible indication of the root cause of the problem.

The FSM will at all times act in a professional manner, and support a partnership with PON. The FSM will represent ICL Pathway's interests only, and will make no commitments on behalf of PON, nor discuss the terms of the contract between ICL Pathway and PON.

If during the course of the visit, the Outlet Manager raises issues which are not part of ICL Pathway's remit, the FSM will take the following action:

- If a PON representative is present, the Outlet Manager will be asked to direct all such issues to that representative.
- If no PON representative is present, the FSM will ask the Outlet Manager to direct all such issues to the NBSC, and remind the Outlet Manager of the specific reasons for the FSM's visit to the site. The FSM will subsequently record on the Problem Management Database a statement that the Postmaster raised the issue, and was referred to the NBSC. The entry is made for record purposes and to ensure that PON business interests are protected.

If the visit identifies that the outlet could benefit from additional support that is the responsibility of PON, this will be noted by the FSM. The FSM will not discuss this requirement with the outlet manager, but will log it on the Problem Management Database as a Cross-Domain issue. This entry will make clear if a PON representative was on site, and who that representative was. PON will then assign a Problem Manager to the issue, who will progress making arrangements for any agreed additional support, and subsequently agree closure criteria with the FSM (acting as ICL Pathway CS Problem Manager).

#### 4.4 Problem Management

Following the site visit, the FSM will produce an Action Plan to progress any ICL Pathway related issues. Details of this action plan will be entered on the Problem Management Database and updated as resolution is progressed.

General resolution progression will follow the process detailed in the ICL Pathway Customer Services Problem Management process document (CS/PRD/021).

The resolution of certain problems may require the capture of specific system information at the outlet to enable further investigation. If the outlet cannot provide this information immediately, the Outlet Manager will be asked to record this information for future occurrences of the problem. Full details of each occurrence should then be raised as a call to the HSH.

In setting the closure criteria for any outlet problem, the FSM should include ensuring that the Outlet Manager is happy with the resolution. If the Postmaster remains dissatisfied, this should be raised as a Cross Domain problem.

### 5 Manager Care Visit Programme

There is an agreed ongoing joint programme between ICL Pathway and PON where senior managers of both organisations visit live Horizon post offices, and the Field Service Management team will participate in this programme. The purpose of the visit is to gather views from the system, and to enable the ICL Pathway and Post Office Network managers to experience what actually happens in the offices. It also gives users of the Horizon system an opportunity to offer views,

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*opinions and improvement ideas to enable both businesses to focus on key areas to improve upon.*

*The process and procedures connected with this programme are still under discussion with PON. When clarified, they will form the basis of a separate document which will be referenced from this document.*

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**Appendix 1 – HSH Call Extract from MSU****PO's with highest incidence of Hardware related calls - period August '00**

FAD Code	PO NAME	FSM Region	Count of Call Type
348611	SARN	South Wales/South/South west	7
6632	CWMBRAN	South Wales/South/South west	7
174406	CHORLEY OLD ROAD	North East/North West	7
337427	FURTHERGATE POST OFFICE	North East/North West	6
73014	BEXLEY	London/South East	6
14007	GREENWICH POST OFFICE	London/South East	6
8011	VICTORIA STREET	London/South East	6
180340	CHAPELTOWN	North East/North West	6
23323	WAKEFIELD	North East/North West	6
18824	WESTER HAILES	Scotland/Northern Ireland	6
105912	ROFFEY	London/South East	5
153508	PARKSTONE	South Wales/South/South west	5
152002	WANSTEAD P.O.	London/South East	5
31007	WOOLWICH POST OFFICE	London/South East	5
19008	SOUTH KENSINGTON STATION	London/South East	5

**Average calls per outlet  
for Aug.'00****Hardware**

FSM Region	Count of Call Type	No. of Live Outlets	Average no. of calls per outlet
N/A*	6	17	0.4

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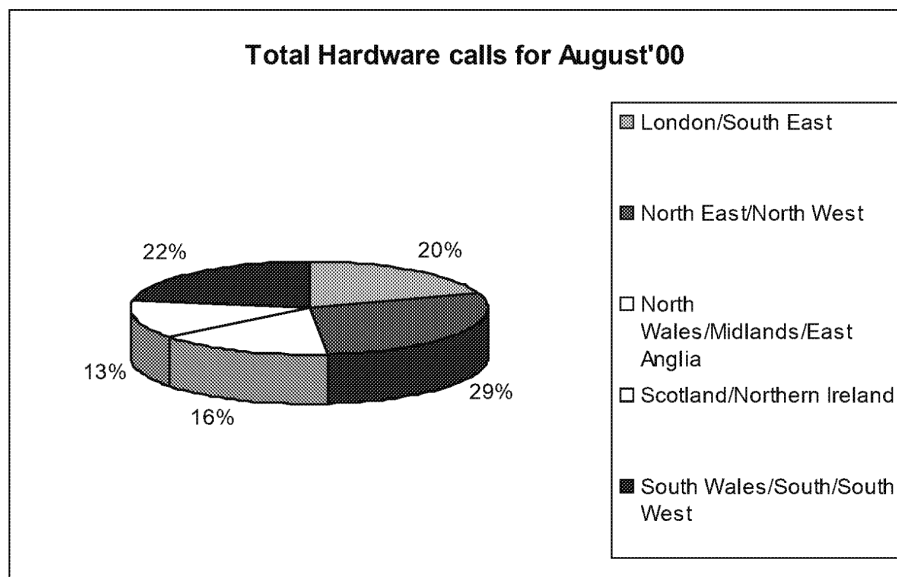
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London/South East	657	1813	0.4
North East/North West	948	3068	0.3
North Wales/Midlands/East Anglia	539	2420	0.2
Scotland/Northern Ireland	444	1548	0.3
South Wales/South/South West	742	2328	0.3
<b>TOTAL (National)</b>	<b>3336</b>	<b>11194</b>	<b>0.3</b>



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FSM Region	PO NAME	FAD Code	HSH Ref No	Call Status	Priority	Severity	Date & Time of Call	Date & Time Closed	CallType
South Wales/South/South west	CWMBRAN	6632	E-0008080152	Closed	0	3 B	08-Aug-00	08-Aug-00	H
South Wales/South/South west	CWMBRAN	6632	E-0008080205	Closed	0	3 B	08-Aug-00	08-Aug-00	H

Problem Type	Problem Code	Opening Text	Closing Text	Repair Code	Resolution	Cause	Opening CSR	Product Id
HD07		Engineer on site advises pm to log call for new printer	Call Close by Wayne Harris: pm htc	R01	RS08	C01	uk080496	PATITH94PTR
HD07		Engineer on site for call no. 0008070429. Wants to raise a call for a prinetr not printing Giro slips properly. Th PO has had problems before with this that they have not been able to resolve through the help desk.	E- Call Close by Shelley Lewis: BM is happy with work carried out and is HTCC	R01	RS10	C01	Uktemp16	PATITH94PTR