Bruce McNiven
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11 August 1999

Dear Bruce

Thank you for you letter of 10 August.

Pathway is convinced that it has done everything that it can to improve the training and prepare users for Horizon, and that the essence of the remaining issues that you are seeking to address relate to POCL's own management of change. This was made clear to Bruce McNiven in correspondence from John Bennett (KP/99Jul339 dated 7th July '99) and a second letter to Bruce McNiven (dated 25th June '99).

Pathway has consistently maintained that user confidence in the system will be achieved only through managing the change in POCL business processes such that POCL's target standard approach is adopted across the Post Office network. Until this achieved by POCL, it will be necessary for POCL to substitute additional support in one form or another. Increased use of the revised training, which is now a very suitable vehicle, is one such form. Another is the gradual dissemination of the target business process through POCL's own support, however provided, to the balancing business process.

For these reasons, Pathway believes the Acceptance Incident 218, which formally relates to training, should now be closed.

Pathway does not accept that any further revisions to the training courses, other than routine minor improvements already identified, are required, or indeed are now desirable in light of the commitments made by both parties to revised courses and collateral.

Pathway has made every effort to make changes to the training to POCL's satisfaction throughout live trial, such that every course has been significantly changed. Furthermore, an additional 24 outlets were installed in July, at POCL's request, to form a basis on which the effectiveness of the training improvements could be – and indeed have been - demonstrated. At every stage POCL has had complete approval authority for the changes being made and has registered its satisfaction with the results of these changes.

The narrative below details the extensive steps taken by Pathway, with POCL approval, to address the concerns expressed in AI 218.

Counter Manager & Counter Assistant courses revised

In response to feedback received from POCL and formally through CR R0052b, ICL Pathway has made a large number of detailed changes to both the Counter Manager and Counter Assistant training courses. Crucially, the Counter Manager (CM) course was much modified to improve coverage and an emphasis placed on the balancing business process and related issues. The CM course now devotes much of Day 2 (Workbook 10) to this process and considerable time is spent explaining the process and checking the understanding of the delegates.

Both the CM and CA courses have been observed and positively received by POCL and approved to go forward to National Rollout including routine minor improvements (Trevor Rollason's Email to Andy Barkham of 10/8/99) which Pathway are only too pleased to incorporate.

ICL Pathway believes that the improved CM training better prepares Outlet managers for the task of balancing when they return to the outlet. This improved training, coupled with changes to the way that Horizon now handles the balancing process, makes achieving a balance much easier than during Live Trial and the comparative success of the extra 24 outlets bears this out.

HFSO course revised

POCL requested several changes to the HFSO training programme in their CR R0060. This CR requested changes to the content of the course, the introduction of a new 4-day MiMAN course and a new 1-day MiECCO course. These new courses provide more opportunities to practice the migration processes and to work with different error detection/correction scenarios – all of which add value to the migration process.

Additionally, ICL Pathway retrained HFSOs during Live Trial to provide more training on balancing and related topics.

Since Live Trial, ICL Pathway has developed a new three-day course for HFSOs that runs after the POCL induction training and before the 4-5 day HFSO course. This extended course (previously it was a two-day event) provides in-depth coverage of balancing; the cash account; reversals; use of the suspense account and error detection and correction.

This new course has been very well received by POCL observers (Ann Cocker and Graham Young) and POCL HFSOs alike, who were pleased that their comments from Live Trial were taken onboard.

HFSO role positioning

The HFSO role has always been pivotal to the success of the programme. In addition to performing migration (a vital function which sets the scene for the first balance) the HFSO also provides help and support to the Outlet Manager at what can be a stressful and trying time. At the point of installation the Outlet Manager comes face to face with the Horizon system for the first time since training and will, naturally, be anxious, even apprehensive. It is important that the HFSO helps the Outlet Manager to complete the migration process effectively and in accordance with the defined processes.

Extra trainers for balancing support

On a weekly basis since Live Trial, ICL Pathway has been providing additional balancing support through the use of ICL TS trainers. ICL Pathway has borne this cost in recognition of the need to enhance support levels at the HSH and NBSC.

Extra Transition Executives (TEs)

The Transition Executive role exists primarily to provide expert help and support to the HFSOs. Since Live Trial, an extra TE has been added to each IP region bringing the total of TEs to eight – thus doubling the initial size of this team.

HSH & NBSC training

ICL Pathway has trained HSH and NBSC staff in the revised processes and systems embodied in LT2. This training was targeted at those topics most frequently calling for helpdesk assistance.

CRs/Balancing process changes

A number of changes to the Horizon system and the way that it deals with balancing were implemented in LT2. These changes sought to make balancing easier and to remove unnecessary steps from balancing processes and procedures.

<u>QRGs and workbooks</u>

The Quick Reference Guides and Training Workbooks have been revised to reflect the new courses and also best practice. These QRGs and Workbooks have been signed-off by POCL for use in NRO.

Yours sincerely

John Dicks

Director, Customer Requirements

Copies: Chris French, Ruth Holleran, John Meagher

     Mike Coombs