

ICL Pathway

**Training Programme
Training Needs Analysis**

Ref: SU/TRN/0001
Version: 1.0
Date: 19/03/97

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Abstract: The training needs to be satisfied in order to support the BA/POCL Counter Automation programme and the associated course specifications.

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0 Document control

0.1 Document history

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Name	Position	Signature	Date
S L Kearns	Peritas Ltd		19/03/97
L Holt	ICL Pathway		

0.3 Associated documents

Reference	Vers	Date	Title	Source
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0.4 Abbreviations

Not Applicable

0.5 Changes in this version

Not Applicable

0.6 Table of content

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1. Document Control

1.1 Change Control

1.1.1 Changes since last issue

This document incorporates the discussions regarding training delivery strategy undertaken between ICL Pathway, PDA, POCL and Peritas Ltd..

1.1.2 Changes forecast

The document will be maintained in response to feedback received throughout the programme.

1.1.3 Reason for this issue

For acceptance by ICL Pathway Ltd. and PDA.

1.2 Status

Draft for review and potential acceptance

1.3 Scope

The document includes those training events intended to satisfy the baseline objective of the training programme provided by ICL Pathway Ltd to support the implementation programme of the BA/POCL Counter Automation programme, i.e. "To ensure that all staff who work in post offices are competent in the use of the automated platform, are aware of the impact on operational procedures caused by the introduction of the platform and that specialist staff are provided with the appropriate additional information to perform their job role within an automated post office"

1.4 Cross References

None

2. Management Overview

2.1 Introduction

2.2 Objective of the Training Programme

ICL Pathway have contracted Peritas Ltd to provide the training programme in support of the BA/POCL Counter Automation project. The training programme is required by ICL Pathway to meet the following objectives:

Compatibility - The programme must be managed and delivered in a manner consistent with the implementation programme undertaken by ICL Pathway Limited and their other subcontractors.

Timeliness - No individual is to be trained more than five working days prior to the automation of their normal counter position.

To the required scope, which is - **“To ensure that all staff who work within a post office are competent in the use of the automated platform, are aware of the impact on operational procedures caused by the introduction of the platform and that specialist staff are provided with the appropriate additional information to perform their job role within an automated post office”**

Achieve appropriate competence levels - The delivered programme is required to ensure that 95% of personnel have a minimum competence that they are capable of processing 90% of all transactions undertaken by their base office correctly.

2.3 Population to be trained

The current contract between BA/POCL and ICL Pathway Ltd provides for 67,000 staff to be trained. The analysis has identified approximately 71,000 staff to be trained excluding turnover of both staff and postmasters which will occur during the implementation programme. The number of staff within the roles identified are:

Postal Officers	7950
Branch Managers/ABM/POA	1300
Subpostmasters	17750
Subpostmasters' Assistants	40000
Franchise Managers & Staff	2000
Nominees & Staff	1000
Retail Network Managers	350
Auditors	200
Post Office Security	100
POCL Helpline	160

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POCL Trainers	130
Regional Support Staff	200
Heads of Retail Network	16
PDA User Acceptance Team	20

2.4 Baseline Competencies

There are fundamentally four groupings of competencies within the post office organisation, as defined by Steve Dance of POCL SW & SW Region.

Numeracy - all POCL employees are required to pass a numeracy test, subpostmasters are not.

Counter Operations - it is POCL policy that all post office personnel are expected to operate the counter transaction services offered at their location. Training however, is variable with POCL employees having a 6 week training course whereas subpostmasters have a 10 day event, with subsequent in-outlet support, they are also expected to take responsibility for the training of their counter staff.

Office Administration and Accounts - The daily and weekly balancing functions together with additional systems administration functions introduced by the platform need to be included within training for management grades.

Specialist Functions - There are specialist and senior management functions within regions and CB HQ e.g. audit and fraud investigations which require a more in-depth knowledge of the control and administration functions of the programme.

2.5 Learning Gap

For the majority of personnel a training programme covering counter transactions, daily and weekly balancing and reporting functions, complemented by the changes to the associated procedures is sufficient to meet their day to day operational requirements.

For managers, specialists and support staff a longer course covering both counter and management implications of the programme is required.

Although the above requirements would satisfy the needs in terms of establishing operational competence, it is essential that there is a 100% attendance at the training programme for users and support staff. To accomplish this a high degree of co-operation is required within the post office. The User Awareness programme must include a high level of quality information on the implementation process and a motivational incentive for all locations and be attended by the majority of managers and staff.

2.6 Proposed Training Programme

The training programme for the BA/POCL Counter Automation programme on behalf of ICL Pathway Ltd. should be modular in form, designed to be delivered to meet the operational requirement of the post office with the minimum disruption to the business and inconvenience to personnel.

The programme as a whole is introduced by the User Awareness event which enables offices to plan for the implementation and generate the necessary awareness of the business benefits which are enabled for

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both POCL and their network of Branch and Sub post offices by the introduction of the Counter Automation programme.

Counter staff within post offices are provided with a 1 day event, typically within 3 days of system implementation.

Managers, specialists, support staff and other staff who deputise for managers are offered a 1.5 day event covering the stock control and accounting functions in addition to the counter functions and procedures.

The training courses are closely synchronised with the implementation programme being delivered 10-12 weeks and 5 days prior to the target user "go-live" date.

All staff are invited to the Awareness programme, and it is highly desirable for all staff and managers of post offices to attend. However, it is recognised that business and domestic pressures will result in some staff being unable to attend and therefore contingency procedures are required to ensure that such staff are not disadvantaged in the subsequent implementation programme.

All staff who work within a post office must attend the appropriate course and achieve the necessary level of competence. All courses include a competence test relating to their ability to process a number of transactions to the required level of competence.

Following installation all post offices receive an training review visit to provide support and clarification of any issues which may have arisen.

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User
Awareness
Programme
Initial
Training
& Accreditation
In Outlet
Practise
(manual offices only)
TRAINED
OFFICE
(go live)

Training
Review Visit

UPDATE
PROGRAMMES

3. Approach

3.1 Research Undertaken

The research undertaken has included:-

- (a.) Reviews with BA/POCL secondees into Pathway.
- (a.) Discussion with the reference South West & South Wales Region training staff.
- (a.) Attendance by Peritas trainers on the following activities:-
 - Sub Postmaster's Induction Course (Hereford).
 - Post Office Cash Accounting Course (Cardiff).
- (d.) Detailed reviews with POCL National Training Consultant - Sue Smith.
- (e.) Reviews with BA training development.
- (a.) Visits and discussion with 6 reference post offices within the Swindon area and supplementary discussion with local (North West & North Wales Region) sub postmasters.

3.1.1 Sources of Information

POCL Secondee	(Palm Singh)
BA Secondee	(Julie Walsh)
BA Secondee	(Mark Cousens)
Post Masters Induction Course	(Angela Hillier)
Cash Accounting Course	(Steve Dance)
POCL Procedural Manuals	
Interviews with POCL staff at both branch offices and sub postmasters within the assigned (Swindon) area.	
Meetings with POCL Training Managers	(Melanie Sherman)
Meeting with POCL Training Consultant	(Sue Smith)
Benefits Agency	(David Steene)

3.2 Establishment of Training Delivery Capability

In addition to the ability to train the post office staff to use the automated platform it was considered at an early stage that for the training programme and individual trainers to have credibility they would require a familiarity with POCL operations rather than simply knowledge of the automated platform. The establishment of a trainer's induction programme which incorporates understanding of both the automated and non-automated office is critical to the success of the programme.

4. Findings

4.1 *Benefits Agency*

4.1.1 BA Training Programme

The Benefits Agency training development unit is developing a series of training modules which define the basic processes for BA staff when interacting with the CAPS system. These processes are generic and relate to any type of benefit. The modules are:

- Introduction to CAPS
- New and repeat claims action, on PDCS
- The effect of CAPS on payments
- Enquiries/Information
- Changing details on PDCS
- Dealing with changes that affect card payment
- Conversion and Transition
- Additional checks, outputs and instructions
- Consolidation - end to end business processing of business events

The BA training programme does not include any details of changes within post office operations relating to the payment of benefits or the information which benefits offices may obtain from post offices when making payments.

4.2 *Post Offices*

4.2.1 Types of Post Office

There are a number of types of post office including:

- Branch Offices
- Modified Subpostoffices, which supersede the geographic scope previously covered by a Branch Office
- Franchise Offices
- Cash account subpostoffice
- Non cash account subpostoffice

These post offices vary in size, and other than Branch Offices, ownership. The principal groups of employer are:

- Post Office Counters (Branch only)
- Multiple Retailers e.g. Martins Retail
- Independent Retailers

In addition there is a large variance in the size of offices as shown below

Counter Positions	Number of post offices	Total Counter Positions in use	Percentage of Benefit Transactions	Percentage of other POCL transactions (Excl. EPoS)
1	8,784	8,784	11.55	9.83
2	6,379	12,758	34.86	30.09
3	2,397	7,191	23.51	21.35
4	772	3,088	10.2	10.14
5	306	1,530	5.74	5.32
6	221	1,326	3.4	4.51
7	164	1,148	3.07	4.49
8	136	1,088	2.75	4.32
9	82	738	1.75	2.92
10+	162	1,856	4.18	7.03
Totals	19,403	39,507	100	100

4.2.2 Basic Competencies

4.2.2.1 Numeracy

All POCL employees are required to pass a numeracy test, subpostmasters are not.

4.2.2.2 Counter Operations

It is POCL policy that all post office personnel are expected to operate the counter transaction services offered at their location. Training however, is variable with POCL employees having a 6 week modular training course whereas subpostmasters have a 10 day event, with subsequent in- outlet support, and are also expected to take responsibility for the training of their counter staff.

4.2.2.3 Office Administration and Accounts

All subpostmasters, counter managers and some assistants, plus other management functions. The daily and weekly balancing functions together with additional systems administration functions introduced by the platform need to be included within training for management grades.

4.2.2.4 Specialist Functions

There are specialist and senior management functions within regions and CBHQ (e.g. audit and fraud investigations) which require a more in-depth knowledge of the control and administration functions of the system.

4.2.3 Job Roles

There are 25 job titles (with associated grades) within the post office organisation. These titles may be simplified into the following roles:-

Postal Officers (POCL)

The function of this job role is to serve POCL customers with a varied range of transactions. They are accountable to POCL and all clients for report production, daily and weekly, and are fully accountable for all transactions, plus cash and stock. Approximately 50% of postal officers are part-time.

Branch Managers, Assistant Branch Managers and Postal Officer with Allowance

Responsible for the efficient operation of their post office throughout the year. They provide operational expertise in resolving areas of uncertainty in client/customer service. They are fully responsible for their staff and the production of an office cash account.

Subpostmasters (Agent of POCL)

They are business people with a private business acting as POCL agents for the community. Their expertise is basically the same as a postal officer, with the additional responsibility for the production of the office account.

Subpostmasters' assistants (employee of a Subpostmaster)

Are employed by sub postmaster and their general duties are basically the same as a postal officer and are not always independent stock or cash holders but can carry out weekly balances for their sub postmaster.

Franchise Managers (Employee of Franchise owner or Multiple Retailer)

Mainly dedicated staff employed to operate post office concessions within large retail outlets. They perform the same job role as branch manager/postal officer. Staff employed within these outlets are normally part-time and the concession opening hours normally are extended to be the same as the retail outlet.

Multiple (Nominees)

Multiple companies, e.g. Forbuoys, operate chains of retail outlet in which a post office service is run. The staff running the post office are normally employees of the particular multiple. They perform the same role as subpostmasters and subpostmasters' assistants.

Retail Network Managers (POCL)

POCL employed managers who are responsible for the efficient operation of a number of post offices providing advice on various topics, responsible for appointing subpostmasters and branch managers.

Relief Subpostmasters (Freelance)

Normally contracted in by the subpostmaster for holiday relief, they have the same responsibilities for the smooth running of the business and normally have the same skills levels as subpostmasters.

Regional / National Auditors (POCL)

Responsible for all financial/accounting and operational procedures within the post office.

POCL Security & Investigation Service (POCL)

Responsible for the prevention/investigation of both external and internal crime. They have a working knowledge of POCL counter operations and accounting procedures.

POCL Helpline (POCL or Freelance)

Normally ex postal officers who provide telephone support to both counter staff and the public.

POCL Trainers (POCL)

Responsible for training counter staff in a classroom environment and on the job training within a franchise outlet or subpostoffice.

Regional Support Staff (POCL)

Experts within POCL who will support the post offices with any operational problems they may encounter.

Heads of Retail Network (POCL)

This group are the line managers of the Retail Network Managers.

4.2.4 Numbers of Staff

Postal Officers	7950
Branch Managers/ABM/POA	1300
Subpostmasters	17750
Subpostmasters' Assistants	40000
Franchise Managers & Staff	2000
Nominees & Staff	1000
Retail Network Managers	350
Auditors	200
Post Office Security	100
POCL Helpline	160
POCL Trainers	130
Regional Support Staff	200
Heads of Retail Network	16
PDA User Acceptance Team	20

4.2.5 Availability for Training

The critical factors are:-

50% of POCL counter staff and 80% of subpostoffice assistants work part-time and a significant percentage are female with domestic responsibilities.

A large number of offices with 1 or 2 counter positions have a small establishment, typically operated by a husband and wife. The implication is that day time training would involve either closing the business or incurring the expenditure of a relief postmaster. The actual option exercised would be governed by the POCL reimbursement policy.

4.2.6 The Operational Environment

Counter positions are generally cramped and subject to interruption to service customer requirements, even when officially closed. They are therefore unsuitable for the efficient delivery of initial training relating to agreed major operational change.

4.3 Facilities of the Automated Platform

The facilities currently defined by ICL Pathway as included within Release 1 of the automated platform are:-

- Order Book Control Service (OBCS).
- Benefit Encashment (BES)
- Electronic Point of Sale (EPoS)
- Automated Payments System (APS)

These functions transform the processing of counter transactions and will significantly impact the existing balancing procedures and submission of data to Chesterfield.

4.4 Training Delivery Options

4.4.1 In-Outlet Training

The operational environment precludes the efficient delivery of in-outlet training. The AnPost experience, where such an approach was applied, resulted in a much slower progression towards live working than would be acceptable for this programme (i.e. 1 month from installation) complemented by a much more labour intensive requirement for training staff.

4.4.2 Classroom Training

A dedicated classroom event, with user interaction and a delivery within the context of the business operation has been identified by research to be the most efficient process for initial learning. However, to be truly efficient the venues must be readily accessible i.e. 15-30 minutes travel, and timings of events must satisfy both business and domestic requirements.

4.4.3 Programmed Learning

Programmed learning techniques using an operational workbook have been found to be efficient provided the following conditions can be provided:

- (a.) Readily accessible support for problem areas.
- (a.) Awareness by the trainee that their individual progress is being monitored.
- (a.) Time to undertake the consolidation exercises within the programme by the required deadline.

For the majority of post offices the conditions could only be provided for limited learning activities e.g. update programmes.

4.4.4 Computer Based Training (CBT)

CBT would provide the ideal medium for training consolidation and subsequent provision of back-up support. However, the secure nature of the Riposte application, the heart of the automated platform precludes the coexistence of other software packages. As a consequence this approach has been discounted as not technically viable, rather a training mode where procedures may be undertaken from within, rather than alongside, the application could be used to replicate and record progress. Such a facility could be used to provide ongoing support, remedial and refresher training as the product and personnel develop.

4.5 Maintaining Competencies

Having established the core operational competencies it is essential to maintain expertise as staff within the business change and also new postmasters are appointed.

The general levels of staff turnover are:-

- POCL staff (low) < 5%
- Subpostmasters (Medium) 10%
- Subpostmasters' assistants (High) 15-20%

The subpostmasters' assistants turnover rate is derived from studies undertaken by Peritas Ltd on behalf of Camelot Group PLC of post office National Lottery outlets.

POCL themselves do not monitor the competence of subpostmaster's assistants and there are legal constraints which imply that POCL are not permitted to provide training and development for this group which represents approximately 60% of the population.

5. Recommendations

5.1 *Implementation Training*

5.1.1 Post Offices

The training programme for the BA/POCL Counter Automation programme on behalf of ICL Pathway Ltd. should be modular in form, designed to be delivered to meet the operational requirement of the post office with the minimum disruption to the business and inconvenience to the personnel.

The programme as a whole is introduced by the User Awareness event which enables offices to plan for the implementation and generate the necessary awareness of the business benefits which are enabled for both POCL and their agencies by the introduction of the programme.

Training for counter staff must be delivered within a classroom environment, the duration for this training being 1 day to ensure that there is sufficient learning and practical time to reach the target level of competence and for proper assessment. However, some will require the 1.5 day course in order to enable them to undertake additional duties or provide management cover.

Management and support personnel, including relief staff, require an extended course of 1.5 days to include the management and administration functions within the post office. In order to provide flexibility of timing this would be offered within 5 working days of the planned implementation.

The training courses are closely synchronised with the implementation programme being delivered 12 weeks and 5 days prior to the target user "go-live" date. Each event will be made available within 30 minutes travelling time for the majority of outlet staff and at a time to cause minimum operational and personal inconvenience.

All staff should attend the awareness programme and, in addition, all staff who work within a post office must attend the course appropriate to their role and achieve the necessary level of competence. To ensure this, the site survey must encompass verification of the management duties undertaken, in particular identifying staff who deputises in managerial positions. A training review visit is provided which may be apportioned according to the individual needs of the staff within an office, i.e. a small office with 3 staff would have a half day of general support. The needs will also vary according to the type of transition undertaken by an office e.g. for an automated office the visit will be synchronised to support the initial live operation.

The training programme incorporates testing and review procedures which correspond to Kirkpatrick levels 1 and 2 in accordance with service level agreements specified in Requirement 915 of the contract between PDA (for BA/POCL) and ICL Pathway Ltd.

5.1.2 Benefits Agency

The current BA development programme is deficient in that there is a lack of awareness of those developments within post offices which could be used to improve the level of service provided by BA offices to the public. It is recommended that all BA staff undertaking a training delivery role should attend the core post office staff training programme or that an equivalent briefing programme be established.

In order to address these deficiencies within the current programme the following supplementary training services are recommended:

5.1.2.1 Training Consultancy

Training consultancy, available from ICL Pathway (Peritas) on a call off basis. This service will provide for a two-way review and assurance of the BA training products.

5.1.2.2 Facilitators Training Course

A half day training course for up to 15 “CAPS training handover” facilitators. The detailed content to include:

- The impact on post offices
- Horizon rollout strategy
- Procedural changes within POCL
- Operation of CMS and PAS

5.1.2.3 Handover workshops

The new concept of payment by card needs to be conveyed to all staff, particularly Field Training Officers. This would occur prior to the delivery by BA of their handover workshops.

5.2 Staff Changes

5.2.1 Staff Turnover

5.2.1.1 POCL Offices

It is considered that the responsibility for training new staff within POCL's own offices is best undertaken by incorporating training for the automated platform within the counter skills training course currently being reviewed by the National Training function within Post Office Counters Ltd. Training staff should be required to attend the POCL Train the Trainer event provided by Peritas on behalf of ICL Pathway Ltd. Having attended the event they will be included in the distribution list for trainer update notifications and also be authorised to order training materials. In order to ensure maintenance of training standards the trainer accreditation will include a formal update/refresher event provided either annually or to support new product releases.

5.2.1.2 Franchise Offices and Multiples

Although many franchise/multiple retailers have their own training organisations, their lack of knowledge of post office procedures causes such retailers to be considered as independent sub postmasters from the perspective of staff turnover training.

5.2.1.3 Independent sub post offices (i.e. Sub post offices not owned by a multiple retailer)

During the implementation programme it is recommended that new sub postmasters and their assistants receive the standard training programmes for manual offices with a supplementary Horizon counter training event appropriate to their role.

5.2.2 Staff Promotions

During the roll out period counter operations staff may be promoted to management positions or otherwise asked to perform a management function not covered by the basic counter operations course.

ICL Pathway will offer a 1 day management upgrade course. This event would review basic counter operations, in order to verify baseline entry competence, and cover those topics covered in the manager's course, Appendix D3 but not included within D2.

The associated competency test would cover management functions only.

5.3 Product/Facility Update Training

5.3.1 Approach

Update training will be carried out whenever a post office is planned to receive new or updated software functionality to their **existing** ICL Pathway work station system.

Update training will comprise one or all of the following dependant upon degree of user change involved in the upgrade or release:

- Classroom training
- Self study materials
- Plain notification

5.3.2 Categories of update

There are 3 categories of update defined for which therefore is a corresponding training strategy/policy.

5.3.3 Update categories and training strategy

Category 1:

A new product which uses existing counter processes and equivalent procedures to those already being used.

Policy:

An updated workbook would be made available for staff to practise using training mode.

Category 2:

A new transaction and/or new process within existing subsystems.

Policy:

An in-outlet update or series of seminar type briefings provided during the working day or evening respectively.

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Category 3:

A new subsystem, or major revision to human computer interface for existing transactions.

Policy:

Classroom training provided in half day, i.e. up to 3 hours, the timing of which is determined by trainee. Options being p.m. or evening.

6. Appendices

Appendix A: Detailed Job Roles

Appendix B: Required Skills

Appendix C: Programme Overview

Appendix D: Course Specifications

Appendix E: Glossary of Terms and Abbreviations

Appendix A Detailed Job Roles

A.1 Postal Officer

Function

The function of this job role is to deliver a range of services to the customer including utility bill payments, selling stocked product lines, payment of benefits, banking and mail services. They are accountable to POCL and responsible for production of daily and weekly client reporting, till balancing, stock and cash ordering movement.

For new entrants POCL offer a modular six week training course covering all aspects of the job description. This training normally takes place at one of POCL's training centres and is classroom based.

Training Constraints

Training for experienced staff must not inhibit their ability to provide a service to the public at the counter. The training programme must not require them to be away from their counter position for long periods of time during the working day.

A.2 Sub Postmaster/Nominee/Franchisee

(also: Sub Postmaster's Holiday Relief)

Function

The function of this job role is to deliver a range of services to the customer including utility bill payments, selling stocked product lines, payment of benefits, banking and mail services. They are accountable to POCL and responsible for production of daily and weekly client reporting, till balancing, stock and cash ordering movement. At present much of the workload is paper based. For new staff going into the above roles some POCL regions offer a 1 day induction course covering an explanation of the following elements:-

1. Auditors report on taking over the business.
1. Nomination of trainer to work with the new owners for a period of 2 weeks during normal hours of opening.
1. Follow up visits would be undertaken by the trainer on the next 2 subsequent weeks to assist with weekly balancing.
4. Public/staff awareness of new product lines.
1. Explains in detail the 2 week "live" training and how it is customer driven in real time situations.
1. The trainer in this situation uses a check list and any transactions not covered live will be explained in detail before the end of the two week training period.
1. The trainer completes an assessment and appraisal sheet on the subpostmaster and any problems can be highlighted. There is also an area on the assessment where the new subpostmaster can comment on the training they have received.

The Induction Course normally takes place at one of POCL's training centres. The two week "course" is normally at the post office outlet.

Training Constraints

After the Induction Course a POCL Trainer is allocated to a particular outlet for a period of 2 weeks.

Because these outlets are normally owned by the subpostmaster, off the job training during business hours presents difficulties. Training has to be on an ad-hoc basis in a “live” situation covering transactions as they happen. Any transactions in this period not covered “live” from the trainers check list will be covered in theory.

After training the outlet will receive a trainer’s support and help for the following two cash account periods.

The staff in this job role are as required by the shop/subpostoffice business as a whole, in most cases it is a one or two person outlet which would not be able to function if training did not take place in situ.

Some staff may have limited IT knowledge but such knowledge cannot be assumed.

A.3 Retail Network Manager (RNM)

Function

Functionally equivalent to the area manager of a group of sub post offices, having responsibility for a number of offices within a defined geographic area. The RNM acts as a trouble shooter for POCL passing information and advice to allocated sub postmasters on the operation of the business. They are also responsible for retaining or terminating agent’s contracts to run the sub post office and conducting audits. This role is critical to the success of the roll out throughout the network.

An RNM’s responsibilities include the following:

1. Ensuring that allocated outlets run in a professional manner in line with POCL guidelines.
2. A full understanding of all POCL working procedures.
3. Liaison with branch managers and sub postmasters and reporting back to POCL.
4. Resolution of all operational problems relating to his/her area.
1. Auditing of the offices for which they have responsibility.

Training Constraints

None, given appropriate notice.

A.4 Branch Manager/Assistant Branch Manager / POA

Function

Responsible for the efficient operation of their outlet throughout the year. They provide operational expertise in resolving areas of uncertainty in client / customer . They are fully responsible for their staff and the production of an office cash account.

Training Constraints

None, given appropriate notice..

A.5 Helpdesk Staff

Function

Currently POCL operate help desks for all post office outlets and the general public.

The help desk is well used, not only by POCL staff but also by the general public. It provides a ready source of information on procedural elements of the business etc and answers queries on new products etc.

Trends are monitored in the type and frequency of questions raised. Once a trend or recurring problem has been established the information is passed to the relevant department and any remedial process is then actioned.

Training Constraints

None, given appropriate notice.

A.6 BA Helpdesk

Function

BA operate a similar help desk for enquires from the general public. It provides a ready source of information on procedural aspects of various types of benefit payments and entitlements.

Training Constraints

None, given appropriate notice.

A.7 POCL Trainers

Function

The trainers are responsible for training new sub postmasters and also new and existing staff on any procedural changes or new products on behalf of POCL.

Training Constraints

None, given appropriate notice.

A.8 BA Trainers

Function

The trainers are responsible for training new and existing staff on any procedural or new products on behalf of the Benefits Agency.

Training Constraints

None, given appropriate notice.

A.9 Regional Support Staff

Function

The trainers are responsible for the support of sub postmasters and also new and existing staff on any procedural changes or new products on behalf of POCL.

Training Constraints

None, given appropriate notice.

Appendix B Required Skills*B.1 Correlation of Counter Terminal functionality to Job Holder*

The charts below identify the subcomponents of the application supported by the automated platform and correlates the relevant function to each job holder within the Post Office organisation.

Role	Aware	H/W overview	START UP	DESKTOP MENU	CTR TRANS	CLERK ADMIN
Postal Officer	*	*	*	*	*	*
Sub Postmaster	*	*	*	*	*	*
Franchise Manager	*	*	*	*	*	*
Counter Assistants (sub)	*	*	*	*	*	*
Relief Postmaster	*	*	*	*	*	*
Branch Manager	*	*	*	*	*	*
Assistant Branch Manager	*	*	*	*	*	*
Retail Network Manager	*	*	*	*	*	*
Nominee Area Manager	*	*	*	*	*	*
Regional auditor	*	*	*	*	*	*
Audit Manager	*	*	*	*	*	*
CRU Staff	*	*	*	*	*	*
CRU Manager	*	*	*	*	*	*
POCL Helpdesk Manager	*	*	*	*	*	*
Helplines	*	*	*	*	*	*
Regional Trainers	*	*	*	*	*	*
POCL security	*	*	*	*	*	*
RML Managers	*	*	*	*	*	*
Group Managers (multiple)	*					
Multiple Group Trainers	*					
CashCo	*					
Regional Management	*					

ICL Pathway

Training Programme
Training Needs Analysis

Ref: SU/TRN/0001
Version: 1.0
Date: 19/03/97

Role	OFF	GEN	SUPPORT	EOS	EOD	EOW
	BALANCE	MAINT	ROUTES	PROCS	PROCS	PROCS
Postal Officer	*	*	*	*	*	*
Sub Postmaster	*	*	*	*	*	*
Franchise Manager		*	*	*	*	*
Counter Assistants (sub)	*	*	*			
Relief Postmaster		*	*	*	*	*
Branch Manager		*	*	*	*	*
Assistant Branch Manager		*	*	*	*	*
Retail Network Manager		*	*	*	*	*
Nominee Area Manager		*	*	*	*	*
Regional/ National auditors		*	*	*	*	*
CRU Staff		*	*	*	*	*
CRU Manager		*	*	*	*	*
POCL Helpdesk Manager	*	*	*	*	*	*
Helplines	*	*	*	*	*	*
Regional Trainers	*	*	*	*	*	*
POCL security	*	*	*	*	*	*
RML Managers						
Group Managers (multiple)						
Multiple Group Trainers						
CashCo						
Regional Management						

ICL Pathway

Training Programme
Training Needs AnalysisRef: SU/TRN/0001
Version: 1.0
Date: 19/03/97

Role	STOCK ADMIN	USER ADMIN	DATA MIGR	TRAINER	AUDIT		
Postal Officer							
Sub Postmaster	*	*	*				
Franchise Manager	*	*	*				
Counter Assistants (sub)							
Relief Postmaster	*	*					
Branch Manager	*	*	*				
Assistant Branch Manager	*	*	*				
Retail Network Manager	*	*	*		*		
Nominee Area Manager	*	*	*				
Regional auditor	*	*	*		*		
CRU Staff	*	*					
CRU Manager	*	*	*				
POCL Helpdesk Manager							
Helplines							
Regional Trainers	*	*	*	*	*		
POCL security	*	*	*		*		
RML Managers							
Group Managers (multiple)							
Multiple Group Trainers							
CashCo							
Regional Management							

B.2 Job Role/Training Topic Matrix

The charts below identify the subject modules within the training programme and indicates the relevance to each of the job roles identified within the survey.

B.2.1 Outlet Staff

B.2.1 Outlet Staff	Postal	Branch	Sub	Sub Office	Relief
	Officer	Mgrs	Postmaster	Assistant	Postmaster
Awareness Event	*	*	*	*	
Hardware Overview	*	*	*	*	*
Start Up procedures	*	*	*	*	*
Main Desktop Menu	*	*	*	*	*
Counter Transactions	*	*	*	*	*
Benefit Payments	*	*	*	*	*
End of Day	*	*	*	*	*
End of Week	*	*	*	*	*
Office Balance	*	*	*		*
Office Admin	*	*	*		*
Care & Maintenance	*	*	*		*
Audit	*	*	*		*

B.2.2 POCL Support Staff

B.2.2 POCL Non ser	Retail Network	Regional Trainers	Regional Auditors	POCL Helplines	PDA UAT	Regional Support	POCL Security/ Investigation
	Mgr						
Awareness Event	*	*	*	*	*	*	*
Hardware Overview	*	*	*	*	*	*	*
Start Up procedures	*	*	*	*	*	*	*
Main Desktop Menu	*	*	*	*	*	*	*
Counter Transactions	*	*	*	*	*	*	*
Benefit Payments	*	*	*	*	*	*	*
End of Day	*	*	*	*	*	*	*
End of week	*	*	*	*	*	*	*
Office Balance	*	*	*	*	*	*	*
Office Admin	*	*	*	*	*	*	*
Care & Maintenance	*	*		*	*	*	
Audit	*		*				*

B.2.3 POCL Support Staff (2)

B.2.3 POCL N-serv(2)	Head of	Head of	Senior				
	Retail	Network	Regional				
	Network	Support	Personnel				
Awareness Event	*	*	*				
Hardware Overview	*	*	*				
Start Up procedures	*	*	*				
Main Desktop Menu	*	*	*				
Counter Transactions	*	*	*				
Benefit Payment	*	*	*				
End of Day	*	*	*				
End of week	*	*	*				
Office Balance	*	*	*				
Office Admin	*	*	*				
Care & Maintenance	*	*					
Audit							

B.2.4 Nominee Franchise Offices

B.2.4 Nominee Franchise Offices	Nominee Area	Nominee Trainers	Franchise National	Franchise Auditors
	Manager		Manager	
Awareness Event	*	*	*	*
Hardware Overview	*	*		
Start Up procedures	*	*		
Main Desktop Menu	*	*		
Counter Transactions (generic)	*	*		
Benefit Payment	*	*		
End of Day	*	*		
End of week	*	*		
Office Balance	*	*		
Office Admin	*	*		
Care & Maintenance	*	*		
Audit				

Appendix C Programme Overview

C.1 Programme Timetable

The proposed training programme operates to the following timetable relative to installation day (day 0 of week 0)

Week no	Activity	Notes
-18	Pathway provide PO details to Peritas	
-17	Invitations to awareness events are issued to outlet managers for all staff	
-16	Managers receive invitations	
-15	Peritas receive responses to invitations, non respondents are contacted	Managers may request alternative dates for some or all staff at the location
-14	Confirmation joining instructions are despatched to the manager	
-12	Managers contacted 3 days before event to check if any changes Staff Attend user awareness	All staff receive implementation guide within briefing pack At the end of this week briefing packs are despatched to all outlets whose staff have not attended an event
-10	Non Attendees are invited to attend now they have had chance to reflect on what they missed	Managers are contacted by WTL to arrange site survey and a letter of confirmation is despatched
-8		Site survey in progress
-7		Site survey in progress
-6	Staff details are received from WTL site survey	
-5	User training is scheduled and invitations issued to manager	
-4	Invitations are received, Peritas may be contacted to adjust dates	
-3	Invitation responses are received and individual schedules entered into the training administration system	
-3	Course joining instructions are despatched to individuals via the manager	
-2	Reminder calls are made 3 days before the event	
-1	Delegates attend User Training	
0	Systems are installed, users are able to practise using training mode prior to going live	This timetable will change for automated offices, remedial training if required.
0	The offices are visited, supplementary supported and training is provided if necessary.	

Appendix D Course Specifications

D.1 User Awareness

Title User Awareness Event

Duration *approx. 2 hours (excluding system demonstrations)*

Attendee Profile

The User Awareness Event is aimed at all personnel working within, or providing support to, post offices, giving them an insight into the major changes which will affect their entire working practices, and the implications of the impending implementation programme.

Objectives

The event is intended to gain commitment to the programme and allow all outlet staff to prepare for the introduction of the system to their business.

At the end of the session the delegates will be aware of the impact automation will have on POCL's business, how the implementation will be carried out, when the automated system will be implemented and what the Counter work station will do.

Structure

NB: The event is preceded and followed by demonstrations of the new system. Modules 2 to 5 inclusive include Q & A sessions.

- | | |
|-----------|---|
| Module 1: | General Introduction
(Initial introduction & welcome by local POCL management, Video) |
| Module 2: | Why POCL/BA are making such major changes
- Protect and Grow the Business
-Increasing business potential
-Cutting down on fraud |
| Module 3: | Impact on your business.
(Supported by video positively looking forward to the opportunities for sub postmasters caused by the programme) |
| Module 4: | Planning for Implementation
(This module is supported by a video)
-Site visits
-Site preparation
-Installation planning
-Training
- Training Review visits
-Help Desk Support Facilities |
| Module 5: | Counter work station Facilities Overview
This session will provide an appreciation of the operation of the Counter Workstation and the facilities provided. |

Module 6: Closing video encouraging attendees to rise to the new challenge

A briefing pack including implementation and training guides is issued at the end of the event. Outlet managers unable to attend or be represented will receive a briefing pack despatched from the Peritas training administration centre.

The Briefing Pack

This pack includes two sections:

1. **Implementation Guide**, the guide provides details of the overall implementation programme including examples of data capture forms, e.g. the site survey forms, with details of who will be contacted, how and when contact will be made. Further information is provided on support facilities within POCL and ICL Pathway and how these functions may be used.
1. **Training Guide**, this document describes the user training programme and the information which is required for the programme to be completed. Recipients are requested to complete a baseline skills questionnaire which will later be used for analysis within Peritas.

D.2 Counter Training Course***Title Counter Assistants Training.******Duration 7 hours + Horizon Accreditation Testing.******Attendee Profile***

The following job roles would be expected to attend this event:

Postal Officers, , Sub Postmaster's Assistants, Franchise staff
(unless they also act as a deputy/relief manager).

The course is highly interactive.

Course Objectives

At the end of the course the user will be able to:-

1. Use the automated EPoS system confidently at the counter position to deal with customer requirements.
1. Use the automated system to pay client benefits and understand the procedures involved with reference to the Operational Reference Manual.
1. Use the reporting system and understand the balancing processes on the automated system.
1. Understand the procedures in the event of a system failure.

Course Structure

Module 1:	Hardware Overview
Module 2:	Start-up Procedures
Module 3:	The Main Desktop Menu
Module 4:	Counter Transactions (Data Capture Of Transactions At The Counter)
Module 5:	Clerk Reporting and Balancing Procedures
Module 6:	Office Balance Overview
Module 7:	General Maintenance
Module 8:	Contingency Procedures
Module 9:	Role Play
Module 10:	Horizon Accreditation
Module 11:	Review

Module Descriptions**Module 1: Hardware Overview**

This session will introduce the delegate to the computer equipment being used on the course, (processor, monitor, touch screen, keypad, printer, magnetic card reader, bar code reader and electronic scales(optional)). There will also be a brief description of how their installed system communicates with the various clients.

Module 2: Start-up Procedures

This session takes the delegate through the steps involved in :-

- Switching on/off the computer.
- Logging on/ out of the system.
- Security procedures
- Changing a password.

An exercise in logging on/out of the system and also changing the password will take place at the end of this session.

Module 3: The Desktop Menu

This session explains:-

- What the Desktop Menu is.
- How to use the Desktop Menu.
- Explain the use of icons.

Module 4: Counter Transactions

This session takes the delegates through the transaction screens on the automated system which are used to process the following transactions:-

- 4.1. Sale of stock items and methods of payment accepted by the automated system.
(cash, cheque, stamps and tokens).
Printing and Reprinting of receipts.
- 4.2. Automated Payments (bar-code reading, magnetic swipe, smart card).
- 4.3. Bill payments. e.g. BT.
- 4.4. Licensing - e.g. DVLA.
- 4.5. Other Mail services - Royal Mail Inland/International Services, , RML service, Parcelforce services.
- 4.6. Benefit Payment Service and Order Book Control System
- 4.7. Banking - National Saving Bank withdrawals and deposits, Girobank withdrawals and deposits, cashing Other Banks cheques.
- 4.8. Local Authority schemes (Transcash payment), Home Help Stamps.
- 4.9. Voiding, Modifying and Reversing transactions.

Exercises will be conducted on the generic transactions at the end of this module.

Module 5: Clerk Reporting and Balancing Procedures

This session will instruct the delegates in the procedure for balancing an individual counter position within a multi-position office.

5.1.Cash Balance

5.2.Stock Balance

5.3.Stock and cash movements

5.4.Reporting

Exercises will be conducted at the end of this module.

Module 6: Overview of Office Balance.

This session explains (briefly) the office balancing processes.

Module 7: General Maintenance.

This session will instruct the delegates in:-

- 7.1. Care of the equipment at the counter.
- 7.2. Changing the printer paper and ribbon.
- 7.3. Changing the receipt printer paper and ribbon.

Module 8: Contingency Procedures

This session advises the delegates:-

- 8.1. Where to find help.
- 8.2. Fall back procedures.

Module 9: Role Play

This session will be entirely interactive with various practical exercises, based on the course content.

Module 10: Horizon Accreditation

Module 11: Review

Student Workbook

The workbook contains the following sections:

Section 1: How to use the workbook

This section describes how the individual should use the work book both within the training event and as an aid to optional practice/refreshers activities using training mode within the workplace.

Section 2: Training Support

This section details the functions of the training help desk and how usage may be adapted to individual requirements.

Section 3: Training mode

This section provides details of the role training mode for practice within the workplace.

Section 4: Counter Transactions

This section provides examples of all transactions which may be provided at a counter including:-

4a Standard Services

Selling Stock Items
National Savings Bank withdrawals and deposits
Benefit Encashments
Green Girocheques (now orange)
Girobank deposits and withdrawals (an example of each type)
Cashing other bank's cheques
Bill payments
RML inland services
RML international services
ParcelForce services
Methods of Payment (cash, cheques, stamps, vouchers)

4b Services not offered at all offices

Local Authority schemes (pay by Transcash) including home help stamps and Meals on Wheels
Automated payments
 magnetic swipe
 smart card
 smart key
 bar code reading
Money transfer
Insurance services
Premium services (International Datapost & guarantee services) no selling of stamps
National Lottery/Littlewoods (cash account figures)
Bureau De Change (cash account entries)
POCL Foreign Exchange Service - pre order service
UK Passports
Setting of Postage Meters (examples of all types of payment)
DVLA
Zero and standard rated VAT (cash account post shops and browser units)

4c Counter Accounting Functions

Balancing

- Cash
- Stock

General Administration Functions

Section 5: Summary scenarios

This section provides a closing summary of a typical mix of products and services detailing the end to end process.

Section 6: Comments and responses

This section gives the user the opportunity to provide comments on the workbook and the associated support services.

D.3 Post Office Manager's Course***Title Post Office Administration Course***

Duration: 12 hours Tuition and practical work with 1 hour of Horizon Accreditation Testing and Review

Attendee Profile

This course is aimed at all management roles within post offices, including those who deputise for such roles. The job roles of appropriate attendees include:

Branch managers, ABM, POA, sub post masters, franchise managers, nominee managers, HORNs, POCL Helpline, regional support staff and the PDA User Acceptance Team.

Audiences may be segregated between sub postmasters/RNM's and other post office managers.

Objectives

At the end of the course the delegate will be able to :-

1. Use the automated EPoS system confidently at the counter position to deal with customer requirements.
1. Use the automated system to pay client benefits and understand the procedures involved with reference to the Operational Reference Manual.
1. Use the reporting system and understand the balancing processes on the automated system.
1. Complete the Post Office management functions within an automated office.
1. Manage the access control functions of the Horizon Platform.

The course is highly interactive.

Course Structure

Module 1:	Hardware Overview
Module 2:	Start-up Procedures
Module 3:	The Main Desktop Menu
Module 4:	Counter Transactions (Data Capture Of Transactions At The Counter)
Module 5:	End Of Day Procedures
Module 6:	End Of Week Procedures
Module 7:	Stock Control and Administration
Module 8:	User Management
Module 9:	Data Migration
Module 10:	General Maintenance

Module 11: Contingency Procedures

Module 12: Role Play

Module 13: Horizon Accreditation

Module 14: Review

Module Descriptions

Module 1: Hardware Overview

This session will introduce the delegate to the computer equipment being used on the course, (processor, monitor, touch screen, keypad, printer, magnetic card reader, bar code reader and electronic scales(optional)). There will also be a brief description of how their installed system communicates with the various clients.

Module 2: Start-up Procedures

This session takes the delegate through the steps involved in :-

- Switching on/off the computer.
- Logging on/ out of the system.
- Security
- Changing a password.

An exercise in logging on/out of the system and also changing the password will take place at the end of this session.

Module 3: The Desktop Menu

This session explains:-

- What the Desktop Menu is.
- How to use the Desktop Menu.
- Explain the use of icons.

Module 4: Counter Transactions

This session takes the delegates through the transaction screens on the automated system which are used to process the following transactions:-

- 4.1. Sale of stock items and methods of payment accepted by the automated system. (cash, cheque, stamps and tokens). Printing and Reprinting of receipts.
- 4.2. Automated Payments (bar-code reading, magnetic swipe, smart card).
- 4.3. Bill payments e.g. BT.
- 4.4. Licensing - e.g. DVLA.
- 4.5. Other Mail Services - Royal Mail Inland/International Services, RML service, Parcelforce services.
- 4.6. Benefit Payment Service and Order Book Control System.
- 4.7. Banking - National Saving Bank withdrawals and deposits, Girobank withdrawals and deposits,

cashing Other Banks cheques.

4.8 Local Authority schemes (Transcash payment), Home Help Stamps.

4.9 Voiding, Modifying and Reversing transactions

Exercises will be conducted on the generic transactions at the end of this module.

Module 5: End Of Day Procedures

This session will instruct the delegates in the use of the automated system for report generation and balancing activities which take place at end of the business day.

5.1. Clerk Balancing

5.2 Team Balancing

5.3. Daily Client Summaries.

5.4. Daily Cash Locked Up.

5.5. Transference of cash and stock between clerks and managers.

5.6. Remitting cash and stock in and out of the office.

5.7. Client Transaction cut-off times.

5.8 Error Notices.

5.9 Stock and transaction adjustments.

Exercises will be conducted at the end of this module.

Module 6: End Of Week Procedures

This session will instruct the delegates in the use of the automated system for report generation and balancing activities which take place at the end of the business week.

6.1 Client Daily Summaries.

6.2. Client Weekly Summaries.

6.3. Reports - stock unit, transfers in and out, remittances in and out.

6.4. Trial Balance production.

6.5. Stock adjustments.

6.6. Stock in hand declaration and report.

- stock
- stamps
- cash

- 6.7. Losses and Gains.
- 6.8. Final Balance production.
- 6.9. Rollover - end of week and end of year.

Module 7: Stock Control and Administration

This session explains the stock administration processes.

- 7.1. Adding a stock unit.
- 7.2. Removing a stock unit.
- 7.3. Modifying a stock unit.
- 7.4. Attaching a stock unit.
- 7.5. Detaching a stock unit.

Module 8: User Management

- 8.1. Non system prompted change of password.
- 8.2. Adding a user.
- 8.3. Remove a user.
- 8.4. Allocating a user password.
- 8.5. Change roles.
- 8.6. Forgotten Passwords.

This session covers what to do when a member of staff changes role, leaves employment, or a new member of staff needs to access the automated system.

Module 9: Data Migration

The data migration strategy for the programme is not yet fully defined. The objective of this module will be to enable the office manager to complete their actions within the migration process.

Module 10: General Maintenance

This session will instruct the delegates in:-

- 10.1. Care of the equipment (counter and back office)
- 10.2. Changing the printer paper and ribbon.
- 10.3. Changing the receipt printer paper and ribbon.

Module 11: Contingency Procedures

This session advises the delegates:-

- 11.1. Where to find help.

11.2. Fall back procedures.

Module 12: Role Play

This session will be entirely interactive, various exercises both practical and written based on the course content will be used.

Module 13: Horizon Accreditation

Module 14: Review

Student Workbook

The workbook contains the following sections:

Section 1: How to use the workbook

This section describes how the individual should use the work book both within the training event and as an aid to optional practice/refresher activities using training mode within the workplace.

Section 2: Training Support

This section details the functions of the training help desk and how usage may be adapted to individual requirements e.g. would the user like a support call at a specific time in the day.

Section 3: Training mode

This section provides a correlation between the generic process groups covered in the counter training event and the full range of client transactions which may be provided at the counter.

Section 4: Counter Transactions

This section provides examples of all transactions which may be provided at a counter including:-

4a Standard Services

Selling Stock Items
National Savings Bank withdrawals and deposits
Benefit Payments
Green Girocheques (now orange)
Girobank deposits and withdrawals (an example of each type)
Cashing other bank's cheques
BT Billing
RML inland services
RML international services
ParcelForce services
E111 acceptance
Methods of Payment (cash, cheques, stamps, vouchers)

4b Services not offered at all offices

Local Authority schemes (pay by Transcash) including home help stamps and Meals on Wheels
Automated payments
 magnetic swipe
 smart card
 smart key
 bar code reading
Money transfer
Insurance services
Premium services (International Datapost & guarantee services) no selling of stamps
National Lottery/Littlewoods (cash account figures)
Bureau De Change (cash account entries)
POCL Foreign Exchange Service - pre order service
UK Passports
Setting of Postage Meters (examples of all types of payment)
DVLA
Zero and standard rated VAT (cash account post shops and browser units)

4c Accounting Functions

End of Day
End of Week
Balancing
Office Balance/Cash account Production
General Administration Functions

Section 5 Summary scenarios

This section provides a closing summary of a typical mix of products & services detailing the end to end process.

Section 6 Comments and responses

This section gives the user the opportunity to provide comments on the workbook and the associated support services.

D.4 Training Review Visit

Title Training Review Visit

Duration

An average of 1 hour per staff member applied in consultation with outlet manager

Attendee Profile

This service is applicable to all post offices.

Objectives

To clarify any outstanding issues and/or difficulties the individual may have or anticipate in processing transactions using the automated platform.

The details of the visit are:

1. For previously manual offices arrangements are made in conjunction with the outlet manager.
1. For previously automated offices the visit supports the first day of live operation.
1. Verify operational readiness of the outlet and it's personnel.

D.5 Course for Specialist Staff.***Duration : 2 days******Attendee profile:***

Variants of the Post Office manager's course are available. The planned variants correspond to the roles of : auditor, regional support, POCL security, retail network managers.

Objective:

To provide the specialist with information necessary to fulfil their specialist role, including an understanding of the activities of the POCL Managers with whom they interact.

Course content:

The course variants will provide, as a minimum, an understanding of all the subjects defined within the POCL manager's course. Specific modules are expanded/supplemented to cover specific needs of the specialist role.

Course Handout:

Attendees are provided with the student workbook pertaining to the POCL managers course with a supplement appropriate to their specialisation.

D.6 POCL Train the Trainer**Title BA/POCL Counter Automation Trainers Accreditation****Duration 1 week****Objective**

To train experienced POCL trainers to provide training to POCL staff and to update relevant course to reflect the new counter operations procedures.

Attendee Profile

Experienced POCL trainers or experienced trainers from other retail organisations who have completed the equivalent training.

Structure

- Module 1: System Overview
- Module 2: The User Awareness Programme
- Module 3: User Awareness programme delivery issues
- Module 4: Counter Transactions
- Module 5: Counter Transactions Delivery (incl. role play exercises)
- Module 6: Office Administration Functions
- Module 7: Office Administration Practical
- Module 8: Training Delivery support services and interfaces
- Module 9: Refresher and Update training
- Module 10: Issues for new sub postmasters
(Integration with POCL induction programmes)
- Module 11: Course Review

Follow Up

Attendees will receive updates to all course delivery kits and be invited for periodic update briefings

Module Descriptions

Module 1: Hardware Overview

This session will introduce the delegate to the computer equipment being used on the course, (processor, monitor, touch screen, keypad, printer, magnetic card reader, bar code reader and electronic scales (optional). There will also be a brief description of how their installed system communicates with the various clients.

Module 2: The Awareness Programme

This session will entail a detailed explanation of the awareness programme, who it is aimed at, why it is taking place and when the event takes place.

The User Awareness Event will be delivered in detail.

Module 3: Awareness Programme delivery issues.

This session cover general guide-line for delivering the event. It will cover problems encountered when delivering the event and will highlight common questions asked.

Module 4: Counter Operations

This session entails a Peritas Trainer delivering the Counter Assistants Training Course. The delegates will then by assigned to deliver modules of the course to the remaining delegates and the tutor.

Module 5: Counter Operations Delivery (include. Role play exercises)

The delegates will deliver modules of the course to an audience (the remaining delegates) and the tutor.

Module 6: Office Administration Functions

This session will take the delegates through the extra facilities which are part of the POCL managers' Course:

- End of Day Procedures
- End of Week Procedures
- Stock Control
- User Management
- Data Migration

Module 7: Office Administration Practical

This session enables the delegates through role play and exercises to deliver the preceding module.

Module 8: Training Delivery support services and interfaces

This session will clarify the training delivery and support routes available.

Module 9: Refresher and Update training

This session will clarify when refresher/update training will need to take place and the methods available to the trainer.

Module 10: Issues for new subpostmaster's
(Integration with POCL induction programmes)

ICL Pathway

**Training Programme
Training Needs Analysis**

Ref: SU/TRN/0001
Version: 1.0
Date: 19/03/97

This session will highlight the main areas concerning the Horizon Service which will need to be incorporated within the POCL induction programmes.

Module 11: Course Review

Discuss the course content with the delegates, ensure the course objectives have been achieved.

Verify ongoing communication and accreditation procedures

D.7 Peritas Staff Gear Up**Title** *Peritas staff induction***Duration** *3 Weeks***Attendee Profile** *All project staff***Objectives**

To ensure that all staff are familiar with the functions of both automated and non-automated post offices and are competent to fulfil their role within the project.

Structure

Module 1:	Counter Transactions	5 days (incl. Test 1)
Module 2:	Cash Accounting	2 days
	<ul style="list-style-type: none">• daily balance• weekly balance	
Module 3:	The Automated Platform	3 days (incl. Test 2)
Module 4:	Training the Trainer	5 days
Module 5:	TPAS Operations	2 days
Module 6:	Telephone Techniques	1 day
Module 7:	MS-Office for Users	2 days

Modules 1 - 3 inclusive are common to all roles within the project, the week 3 programme of module 4 or modules 5, 6 and 7 are specific to the requirements of the job role.

Appendix E Glossary of Terms & Abbreviations

BA

The Benefits Agency

CAPS

Customer Accounting and Payment Strategy, the system which interfaces specific benefit payment systems to the Counter Automation systems.

ICL and ICL Pathway

Members of the ICL (International Computers) PLC group.

CBHQ

Counters Business Headquarters

PDA

Programme Delivery Authority, the joint board from BA and POCL which is the contractual interface with ICL Pathway Limited.

PDCS

A BA sub-system associated with CAPS.

Peritas

Peritas Limited, an autonomous business within the ICL group formerly known as ICL Training Services

POCL

Post Office Counters Limited