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Abstract: As a result of introducing the Benefit Payment System into the 10 offices in Stroud early, ICL Pathway has gained valuable experience which can be applied to the introduction of the subsequent releases for the national rollout. This document covers some of the significant lessons learnt from IGL.

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0   Document control

0.1   Document history

Version	Date	Reason
0.1	06/11/96	Issued to IGL Team to add to the text here and to gain comments.

0.2   Approval authorities

Name	Position	Signature	Date
Terry Austin	Programme Director		

0.3   Associated documents

Reference	Vers	Date	Title	Source
[1] BP/PLA/0001	1.1	02/08/96	Initial Go Live Stage Management Plan	

0.4   Abbreviations

0.5   Changes in this version

Updated as a result of additional items received, refer to Acknowledgements.

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0.7 Acknowledgements

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1 INTRODUCTION

As a result of introducing the Benefit Payment System into the 10 offices in Stroud early, ICL Pathway has gained valuable experience which can be applied to the introduction of the subsequent releases for the national rollout. This document covers some of the significant lessons learnt from the IGL stage within ICL Pathway.

This report has been divided into the key functional areas within ICL Pathway and is based upon the collective experiences of the IGL team to date following the successful introduction of releases 0.1 and 0.2. Further details are defined in the IGL Stage Management Plan, ref [1].

2 SCOPE

This report covers the lessons learnt to date from each of the key functional areas within ICL Pathway only, as a result of the Design, Development, Testing, Implementation and Support of the Initial Go Live releases into the 10 Stroud offices.

Given the complex nature of this type of programme and vast number of people involved at various stages, it is not possible to collate all of the experience gained across ICL Pathway within this report. This report covers only some of the more significant lessons which have been highlighted to the IGL team over the past 4 months.

Release 0.2 has only been in live operation for three weeks at the time of writing this document, and therefore the steady state teams will continue to learn over the next 6 months during the life span of IGL.

3 LESSONS LEARNT

For ease of reference this section has been divided into functional areas within ICL Pathway, although some of the points are general in nature and may apply to more than one of the areas described here.

3.1   PROGRAMME MANAGEMENT

3.1.1   IGL PROGRAMME

IGL was implemented as a result of a political imperative from Peter Lilley which called for the introduction of payments of benefit by card, with the deadline of the 23rd September. From the award of contract to Pathway in May, this left just 18 weeks to go live with no option to slip this date.

The IGL programme was compressed to the minimum work required in order to meet the objectives within the required timescale. As a result, functionality within the system that could not be developed within the time available, was worked around by defining manual processes within the Post Offices and BA. Without the political influence and deadline, it is likely that more time and effort would have been put into developing and testing the products, with less reliance on manual processes.

Pathway itself was just evolving in all areas during this period. Many of the resources required for this stage were brought on part way through and the supporting business processes were defined and refined as Pathway grew.

In summary, by the nature of IGL significant work was required during the programme to recruit staff and define supporting processes and procedures from scratch, alongside the primary task of building the IGL system and service.

3.1.2   BA/POCL REQUIREMENTS

Throughout the stage, additional requirements on Pathway appeared over and above those agreed initially within the Stage Management Plan. These originated from groups within BA and POCL who were not directly represented within the Step 1 reviews. For example, significant work was required late in the programme to satisfy the reconciliation process between BA and POCL, although no MIS reporting requirements were identified by the Step 1 team when the plans were defined.

It is essential that PDA own and manage the interfaces to other parties within the automation programme and that strict change control is applied to new or amended requirements.

3.1.3 STAGE MANAGEMENT PLAN

As mentioned previously, despite all of the discussions between Pathway and the PDA to define the requirements, there was a tendency for people to look at what was delivered and then decide what they really required. Also requirements which had not be defined, i.e. receipt formats, became "essential" to the business when we declared it was too late to develop new functionality.

The key document during these discussions was the Stage Management Plan. This document stated up front what our baseline assumptions were, specific details in our solution not mentioned elsewhere. It also described our approach in certain circumstances, i.e. when CAR's were not achieved in time.

This highlights the importance of document management and change control. It is essential to ensure that the change control process is followed even if it requires ad hoc meetings. Pathway must learn to say "no" to changes that become imperative to the business if these are not defined in time.

3.1.4 SINGLE INTERFACE TO PDA

Early on in the programme it became apparent that the Step 1 team were being given varying answers to the same questions depending on who they were talking to in Pathway at the time. This occurred particularly during the testing phase whilst the procedures were being produced, where answers to specific questions were based upon either what the system should do or what it does do. In addition different parts of the programme would come up with the same questions. The Stage Manager then became the single point of contact for Pathway and all questions from their side were directed to a single contact on the Step 1 team. Queries were recorded in the "Daily Fax" and responses could be monitored. This resolved the problem of conflicting messages and avoided wasted effort replying to the same questions. However, at particularly busy periods this process did become a bottle neck in communications between Pathway and the rest of the programme.

For release 1, the communication process in Pathway needs to be considered in terms of Authorised Contacts for the PDA.

3.1.5 PROGRAMME COMMUNICATIONS

During the lead in to going live in September and October daily conference calls were found to be necessary. An "A Team" was set up which consisted of representatives from the Step 1 team, Pathway, CAPS, BA region and the Post Office region. This provided a rapid communication mechanism across the whole programme at a critical time.

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3.2 DESIGN

3.2.1 DETAILED DESIGN SPECIFICATION

For IGL, the architecture design was only available at a high level except for the specification of the applications. This meant that detailed design, in particular hardware configurations were produced mainly in the Solution Centre, in order to meet the testing schedule. From the configurations set up in the testing cells the build scripts were developed and issued. Given this process of refining the specifications from development, testing and implementation, meant that the design could change when finally implemented. For example, only a single correspondence server configuration was implemented because there was no specification available for a multiple server configuration in time for this to be tested.

3.3 TEST AND INTEGRATION

3.3.1 JOINT TESTING PROGRAMME

At the start of IGL, BA had responsibility for acceptance testing the end to end processes and counter procedures. As the testing plans were developed for release 0.1, the PDA produced their own independent test schedule, including security testing. The result was that the T&I team had to support two testing programmes with BA/POCL which included duplicate tests. This significantly tied up valuable resources and limited the amount on internal testing achieved in the time available. For release 0.2 we ensured that the PDA produced a single programme which covered all requirements from BA and POCL.

3.3.2 GOING LIVE

The following are specific points picked up by the testing team during the preparations for going live :

- a considerable amount of time was spent doing system back up and restores

- there is a need to determine centrally that the links to the PO's have worked, i.e. the data has arrived and is correct. The volume of data and number of PO's in release 1 will mean that it will not be feasible to travel around and manually check the records

- for release 1 it is recommended that the live data is transferred into another test machine to validate the basic functions, for example encashments etc., rather than loading onto the live environment, testing, backing out and then replacing

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- in future we should verify the data migration process against live data and then validate that the normal processes, for example encashments, work against the migrated data

- better tools/facilities are required for looking at and analysing the data on the servers and within the PO's, for example file compare etc.

- non contributing personnel, i.e. interested parties from the PDA, should be kept away from the local environment to avoid distracting the team during key periods of going live.

3.4   IMPLEMENTATION

3.4.1 PROCESSES AND PROCEDURES

Defining the processes and procedures for IGL was delayed until the end of the stage due to the late availability of the products. This did not only affect the counter procedures but operating/support processes as well. In particular, significant additional effort was required by Pathway staff to help the PDA define local procedures i.e. BA office processes etc.

3.4.2 TRAINING

The following is a summary taken from the report on the IGL Training in Stroud prepared by Elizabeth Battell.

- the training and training documentation worked very well for the post masters

- the use of the "Counter Workstation Consolidation Workbook" exercises are essential for user's confidence and should be endorsed by post masters and management

- the Counter Procedures manual must match the system operation

- trainers need a comprehensive understanding of current Post Office procedures

- awareness of the post masters own "tried and tested" communication/help systems are necessary, both correct and incorrect information travels very fast

- the Post Office customer needs extra guidance to ensure the instructions given are acted upon. This will also assist with continued Customer Care at the Post Office

- "In Store" training is not ideal, and if used, time needs to be added to take account of the distractions and interruptions.

3.5 CUSTOMER SERVICES

3.5.1 JOINT LESSONS LEARNT

A separate document is being jointly produced by Rod Stocker and Martin Riddell which covers the lessons shared between BA/POCL and Pathway.

3.6 COMMUNICATIONS

3.6.1 IGL LAUNCH

The IGL launch of the card was driven by the Secretary of State seeking a high profile launch. In general the logistics of the event worked well - we received some excellent local coverage of the card and largely accurate communication of the main messages.

Having the event in Stroud however, reduced national press interest and sending out invitations so late reduced press ability to attend.

3.6.2 BRIEFINGS

Changing the date of the Special Interest Group briefing (originally planned for the 16th September in Stroud) and holding the revised briefing in Leonard Stanley, coupled with the sending out the new invitations only 5 working days before the event, meant that only 15 individuals turned up - this is low compared to the 48 who responded to the first invite. As a result the Special Interest Groups were not as well briefed as we had originally planned - necessitating us to follow up with a mail shot to all those who could not attend: a huge amount of effort and cost. Lessons learnt are:

- make sure the Secretary of State is in agreement with the plans

- make sure the customer education objective remains paramount.

3.6.3 LIVE TRIAL

At Live Trial our imperative should be to ensure that the messages and all activity is customer education based. This is especially key as Live Trial will be impacted at some stage by a General Election.