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Appendix C

Classroom		
Stakeholder	**Change requested**	**Output**
Chris Fayers	Lose Sales Session - Too long a session , delegates don't like it and don't participate, (General comment on all sessions. Not specific to an actual session.)	This relates to all conversational sales sessions and is dependant on number of participants and their willingness to participate
	Lose 6 Credit Card - We can only refer to the leaflet	Are we obliged to keep on timetable regarding Sales Team? Session is still valid even though we cannot process in branch.
	Lose 12 pt2 Perfect Branch - See no benefit to this exercise	Slides are set by the Sales Team and are currently under review. The exercise is designed as an end to the course (for most) which enforces knowledge of conversations. It is dependant on the number of delegates/willingness to particpate. No change required to slides, they are just summary slides building up to the exercise. Could be moved to before Stock Balancing session as delegates just want to go home after that.
	Lose Insurance session is far too long. Could be split and use session on Car Tax to introduce car & bike. Home insurance linked with redirection etc	Agree with this but are we set these slides by the sales team and what, if any, can we change? Would also mean a lot of work to change each session to include the conversations etc
	Lose 12 pt2 The Perfect Branch - The content of the slides is poor and basically is already covered in the sessions Business Awareness, Customer Service and The Secret.	Slides are set by the Sales Team and are currently under review. The exercise is designed as an end to the course (for most) which enforces knowledge of conversations. It is dependant on the number of delegates/willingness to particpate. No change required to slides, they are just summary slides building up to the exercise. Could be moved to before Stock Balancing session as delegates just want to go home after that.
	Lose Handout – The secret assessing conversations - More beneficial is to replace this with the 'Science behind the conversations' (to go with the Minimum standard conversations handouts.)	No change required. The 'assessing convesations' handout is to enforce the slide. The 'science behind the conversations' is a 19 page document and is not designed to be given out, more as a reference point although it can be printed on an ad-hoc basis as required.
	Lose The Secret - 45 Slides!!! This whole session does not work & is unnecessary if the sales aspect of our transactions are delivered well.	Slides are set by the Sales Team and are currently under review. The session is designed as a pre-cursor to doing the individual sales sessions showing the science behind sales. Is the issue more to do with the wording on the slides/notes than the session itself?
	Lose 65 Homephone & Broadband - Slide 7 & 11 on handout	No change required. Minimum Standards conversation slides to remain as per all other sessions. These are under review by the Sales Team
	Lose Minimum service standards 9/05 - colours, cant read, coloured blind people cant read. States on school for blind, red and green unreadable.	Minimum Standards conversations under review by Sales Team. I agree the colours are not ideal. Red and green is designed to be like traffic lights suggesting a route to follow. The handouts/slides could be changed

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		so that the question box has a red or green outline but the in-fill is white with black writing. This would still be identifiable but easier to read
	Lose Minimum standards - Sheet 11, 4th triangle along writing unreadable.	Minimum Standards conversations under review by Sales Team. I agree the colours are not ideal. Red and green is designed to be like traffic lights suggesting a route to follow. The handouts/slides could be changed so that the question box has a red or green outline but the in-fill is white with black writing. This would still be identifiable but easier to read
	Change 64 PO Savings - Overcomplex with delegates being bombarded with features on all savings. Let's use the HOL kit in practical support of products and services ie concentrate on instant Saver which can be processed on HOL, and also premium bonds which again can be processed on HOL. Quick overview showing web site on our other products.	Does the Sales team have ownership on the content of this session? What can we change? Inputting on HOL is an option but will add time to the course. It is a 'scan barcode' transaction so not hard to do. Time is better spent doing other practicals.
	Add to Insurances - Very brief overview on Insurances and where to access info ie website, or Help.	Does the Sales team have ownership on the content of this session? What can we change?
	Change - Concentrate on practical 'Customer Referrals' exercise using Car Insurance / Home insurance. Can't remember if we can completely process Over 50 application on HOL in classroom. If we can have an exercise on taking application and in depth selling scenario using Over 59 Prospectus.	Inputting on HOL is an option but will add time to the course. It is a 'scan barcode' transaction so not hard to do. Time is better spent doing other practicals. No harm in doing a customer referral transaction but can be at discretion of instructor rather than a scripted transaction
	Change The Secret slide – far too long, too many slides, mail workshop results slide is not easy to understand. Made for internal use – BDM's??	Does the Sales team have ownership on the content of this session? What can we change?
	Change Insurances, link them to sessions – example, home insurance linked with redirection rather than 3 hours on insurances.	Good idea but will need to agree which product can be introduced in which session. Will have a big impact on the FTL's who hold those sessions as each session would have to be changed to include the conversation/product.
	Change 12 Customer service - Better if merged with session 1 Intro, too late in the course by day 2	No change required. The 'intro' session on day 1 is an introduction to the course itself. Session 12 Customer Service is a pre-cursor to Session 12 pt 2 and sets the scene for that session.
	Change 64 Savings - Very wordy slides, could do with a lot of simplification & most of the detail in the notes.	Does the Sales team have ownership on the content of this session? What can we change?
	Change Minimum service standards9/05 - Red green to white on red. Black on red to white on red	Minimum Standards conversations under review by Sales Team. I agree the colours are not ideal. Red and green is designed to be like traffic lights suggesting a route to follow. The handouts/slides could be changed so that the question box has a red or green outline but the in-fill is white with black writing. This would still be identifiable but easier to read
	Change Minimum standards - grey should be black writing.	Minimum Standards conversations under review by Sales Team. I agree the colours are not ideal. Red and green is designed to be like traffic lights suggesting a route to follow. The handouts/slides could be changed so that the question box has a red or green outline but the in-fill is white

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		with black writing. This would still be identifiable but easier to read
	Keep Minimum Standards Conversations handout very good starting point for delegates	No change required
	Keep 12 pt2 The Perfect Branch - no issues	No change required
	Keep 61 Insurances - no issues	No change required
	Minimum Standard Conversation would have been useful if they had it sent to them with the distance learning pack so they would be able to look at it in advance so as to see what they would be doing when we cover the perfect branch.	No change required. Previous feedback suggested too much was in the DLP so it was reduced dramatically as a result. Minimum standards document is introduced earlier in the week so they are aware of the conversations anyway.
	Having done my first course for quite a while I went into this course with a positive attitude but possibly looking for issues. My initial thought is what has changed. I have already expressed the opinion that we might have missed the boat as far as making changes to the course and still hope this isn't seen as being negative and unconstructive. It seems to me all we have done is to take the old sessions, up date them a little but no longer call them module 1, 2 or 3. I was very aware that this course is still a one size fits all type of course which is aimed more towards the crown office branches. All of this might of course be changed with the network changes, even so, SPMR of Main PO Branches are not the same as counter assistants in a Crown Office, my feeling is there should be a course written completely from scratch that is aimed specifically at someone who will have to run a branch by themselves after a couple of weeks or so. As a for instance, we could cover Rem's more fully. The notes are very full now almost scripted and even though I tried to follow them I found I was talking a head of the slides. I do find it hard to train with the notes in front of me meaning that I have probably missed something that was important. The onsite training will probably high light if that is the case. When I was running courses back to back I developed my own style and more importantly, made changes. So the next course always ran smoother than the previous one, unfortunately this doesn't seem possible now, which I fully understand. Day 2 I found a very heavy day and I think the delegates did as well. Someone commented that Business awareness sits better in day one. I didn't really understand slide 14 in session 9, and there are no notes. The notes for slide 6 say, 'you may have seen this before', when did the delegates see this slide before? If we are going to simply put another presentation designed for a different type of audience into the course, can we at least make some changes to reflect what we are about? In fact I wasn't comfortable delivering this	General comment on running a course. It does suggest that if you do classroom training on a regular basis, you are able to understand the course content better and develop a fluidity in your delivery. This can only be obtained by doing courses regularly so, dependant on geographical location and delegates availability, this may not be the case. Do we go back to having a small amount of people who deliver courses? Slide 14 on Session 9 The Secret is a little confusing. It seems to compare branches that have been on a sales workshop for Mails against those that haven't although it is not too clear what it all means. Do we need someone from the Sales Team explaining/running this session at one of our Patch meetings? Hopefully this is under review and it will become more clear.

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	session as although it clearly is important, I didn't feel qualified to deliver it. It is clearly designed to be delivered by an experienced sales manager. Still I feel I did my best.	
Dave Ogleby	Change 23 RM parcels - Slides 10,11,12 & 13 are repeated over the next three sessions, it's a bit repetitive & heavy handed	Will stay for now until Michael Larkin team refresh the sales/service conversations in Q4, although the conversation isn't one of the slides Frank has asked to be moved. I think the slides are necessary on all three sessions, as they reinforce the message about income generation, and give the delegates a chance to think about linked sales opportunities, and also recap on the session they've just done.
	Change 43pt1 PFWW Inland - as above	Will stay for now until Michael Larkin team refresh the sales/service conversations in Q4, although the conversation isn't one of the slides Frank has asked to be moved. I think the slides are necessary on all three sessions, as they reinforce the message about income generation, and give the delegates a chance to think about linked sales opportunities, and also recap on the session they've just done.
	Change 43pt2 International Parcels - as above	Will stay for now until Michael Larkin team refresh the sales/service conversations in Q4, although the conversation isn't one of the slides Frank has asked to be moved. I think the slides are necessary on all three sessions, as they reinforce the message about income generation, and give the delegates a chance to think about linked sales opportunities, and also recap on the session they've just done.
Rita Kendellen	Change Passports (42pt3) -Passport session would be easier if we had the previous example used from previous module	No changes - Session was changed to add a blank passport to be completed by delegates initially and left the option for 1 or 2 practical examples in this session. Only one feedback so leaving as it is for now.
	Change 42pt2 Bureau - Pre order process does not work on HOL so quick overview only needed. Rem in currency to each SU and concentrate on buy and sell of Euro Dollars only. Carry on with Travel Money Card as it is. Overview only of travellers cheques as we cannot process.	No Changes - Only one slide for Pre Order (more than previously) and says to talk through as cannot be processed on HOL. Rem in of currency to be added to prep guide. Travellers Cheques can be processed using dummy cheques available as Adhoc item.
	Change - Bureau session needs to be made more appropriate to offices on course especially if only Pre order/Euro on demand	No changes - Courses are mixed so this is down to the delivery of the session being made appropriate for the audience. We need to include content that is suitable for all delegates
	Change 42pt1 Travel Insurance - slides 16&17 are the wrong way round	Changed
	Change 42pt2 Travel Money - slides 34&35 wrong way round	Changed
	Change 42pt3 IPS - slides 11&12 wrong way round	Changed
Bob Collins	Keep 74 Redirection - no issues	Reviewed the handouts and material with Anne Lealman during the summer. Anil made changes and on EASE via Myself. All timings to be reviewed with general timetable review
	Keep 45 Security - no issues	Arranged review with Dave Pettitt & Mark Dinsdale for Grapevine invited to FTL's WTL's and with support from Neil Stewart & Dave Young agrred

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		amendments and contents and placed on EASE. All timings to be reviewed with general timetable review
	Keep 54pt1 POCA existing accounts - no issues	All amendments made to fit any changes during the year. All timings to be reviewed with general timetable review
	Keep 54pt2 POCA opening etc. - no issues	All amendments made to fit any changes during the year. All timings to be reviewed with general timetable review
Chris Gilding	Lose 46 Cash Management - Relevant only to Sub Postmasters. Can be covered much better on site.	No change - Important to stress the impact on business profitability for all to see.
	Lose PSA – daily - A few seconds after each session is all that is needed for trainees to enter any comments on their PSA. We also have 1 ½ hours on the last day to catch up if necessary.	Agree best way forward (a) as listed here or (b) formal sessions remain. Await outcome of timetable changes in Qtr 4
	Change 1&4 Intro H&S - Wording on slide e "interesting" about yourself.	"Interesting" removed
	Change Business Strategy - 3/4 shows values as FACTS	Was updated in June 11
	Change Introduction to horizon 8/1 - Q3 customer has £5	Was updated to £6 on 7th July
	Change HOL Help - Exercise similar to that for COM's. Use questions that we know will be asked in branch eg DVLA VED; stores catalogue; country codes; customs; prohibitions etc	Not essential as this is an exercise in navigation only. However 3 questions have been altered to cover regular searches..
	Change PSA - Retention – how long? Who it's sent to – Contract Admin Team not branch support Team	Retention Periods listed at end of guidance notes.
	PSA needs to be revisited as we feel at the present it does not give a guide to how the delegate has performed in the classroom.	More detail required.
	Stock balancing is only 2 slides and that is taking about cash management, which has already been covered in an hour's session. It needs to have more reference to all aspects of balancing – for example, TP and BP, net discrepancies' settling centrally, transaction corrections and rems.	2 new slides added to explain balancing terminology and accounting procedures for Gains & Losses
	Add more information regarding how a branch works difference between office & stock unit, TPs & BPs, how Horizon accounts for transactions.	as above
	Change 1&4 Intro H&S - "something about yourself.	As above
	Change Business Strategy - New values are FEB	Was updated in June 11
	Introduction to horizon 8/1 - Change this to £6	Was updated to £6 on 7th July
	Change 1 and 4 session H & S - slide 14 mis spelling shows LACATION	Version 1.4 - changed to Location
	Change Slide 3 H&S - add the word NO TEXTING on mobiles	Wording changed to - Mobiles - switch off. Only use during breaks, your full attention is required
	Add to H&S slide 16 - Green line around items for 10kgms plus	No change as H&S is an overview session only, don't want to get bogged down in too much detail. Also Green Line is no longer a requirement. Parcelforce session covers this.

	Introduction to horizon trainers notes - Add after slide 5 but before 6, delegates need to log on with the cto user name, create themselves, THEN they log out and log back in using their new user. Then complete the practical exercise	Notes added to slide 6
	Session 46 slide 3 notes - add in calculation how we got to the final sum.	Explanation of how the sum is calculated has been added to the notes
	The new Help navigation exercise - This new exercise crucial to the new course to 'sow the seed' of the importance of the Help function was not in my prep box (2 weeks ago). I had to print off my own copies. *Confirmation required that this will in future be included.*	Sandra confirmed that 8,2 is a Reprep item, 8,3 is adhoc and should be printed by FSA's as required
Frank Martin	Blue Cashcheques transaction especially is now very uncommon and could be covered on site if necessary this would give more time in class to introduce Paystation and stress to the delegates' how important Paystation is to the future of the business rather than spend time on paper based transactions that we as a business are moving away from.	Agree we can take out the session as we cover HMRC cheques in the same session wich covers security etc, will look at Paystation session once the timetable has been reviewed
	Change: Combine the Cashcheques and DWP sessions which are very similar There is no need also for 2 separate questionnaires, these could also be combined.	Good idea combining both sessions and having one questionnaire but will review when we change timetable
	51pt1 CheqDebitCredit Card - General note: Would be good to have a slide to explain what we can/can't accept cheques for.	No, and the reason for this is we could be constantly changing the slide if the way we settle a transaction changes, bill payments normally have the method of payment on them, there was a list of products sent out telling us what we can't take cheques for and we can use debit cards for most transactions and if their not sure we all ways ask the customer to try anyway.
	Change DWP answer sheet - Full driving licence if paper one, or full/ provisional photo driving licence	Q.7 would a driving licence be acceptable when cashing a Girocheque, change wording on answer sheet to what is on feedback, yes can change
	Keep 16 Postage Stamps - no issues	No change
	Keep 51pt2 Cashcheques - no issues	No change
Julia Mann	Lose 70/72 International Letters etc. Slide 9 as all others of this type - too confusing on a slide. Small packet etc lose	This slide needs to be left as it is at moment, as the Sales Team are updating/re-designing slides and conversations.
	Change 70/72 International Letters etc. Plain text with 3 headings and list underneath of what can be enclosed in each. Wings are stupid	Queried with Frank - 02/12 - response received 14/12 . Not implemented as the aim here, is for delegates to use HOL Help to define the 3 rates of International Mail – Letter, Small Packet and Printed Paper.
	Session 70/72 - add cash and jewellery must be sent in polyops, counter focus has picture	Queried with Frank - 02/12 - response received 14/12. Not implemented as I checked HOL Help and couldn't find any reference that states cash and jewellery must be sent in polyops. When I enquired about this further and asked the contributor where a picture of a polyop could be added the answer was to slide 23, however there isn't a slide 23!
Pete	Change **Day 7 – MVLs** (66 & 68) All V11 do not show correct prices	Cannot be altered as V11's and Tax Discs will

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Jackson	on HOL screen , We should if possible just carry out transaction of 1, PLG , 1 Motorcycle & Pc , The V11 for Disabled does not come up as a zero price so it makes it awkward to show delegates what to expect. Add in about the break in a tax disc in a slide with regard to, the customer can purchase it only 2 days before the end of the month, for the new month or have it starting from the 1st from the month they came which means they have lost 3 weeks but still have to pay for it to be legally on the road.	always be out of date Extra slide put into session regarding 2 day rule.
	Any scope for mentioning AEI service?	• To remain as part of the on-site training as by proportion of delegates there will only be a few.
	Add handout for spoiling tax disc's to prep box	Added to process
	37 Postal Orders - Slide 10 not in keeping with other presentations when indicating a practical is to be done.	The slide is designed to put the delegates into the correct frame of mind. Also same style in MVL's
	66&68 MVLs - no issues	No action required
	50 DVLA Premium Service - no issues	No action required
David Patrick	Change 59&60 NS&I - Losing the work, premium bonds can be incorporated into PO Savings, which I shall comment on later	NS&I slides already amended and sent 7/11
	NS&I products from course leave only Premium bonds and INVAC account in light of recent events	NS&I slides already amended and sent 7/11
	7pt2 Regulatory Compliance – Slide 22 add to notes instead. Slide 30 The video (if available) duplicates what has already been trained	Noted - full 7pt 2 session is currently with Georgina Blair (risk & assurance reg compliance training manager) for a full review to ensure it is current & fit for purpose. Slide 30 reinforces the message
	Lose 47 ETop ups - Slide 18 as before - its on a handout	simply adds a visual to help with product knowledge
	Lose Reg Compliance - FSA, AML and Mails	Noted - full 7pt 2 session is currently with Georgina Blair (risk & assurance reg compliance training manager for a full review to ensure it is current & fit for purpose
	Compliance workbooks or learning packs should still be issued as delegates that have been on the course have not been able to read up before taking the on line tests, and have no points of reference afterwards.	Escalated to Shirley hailstones for consideration
	7pt2 Regulatory Compliance - Slide 4 says "Activity One" but there are no other "activity" slides.	will take the word 'one' off it
	Reg Compliance - Receipts delegates bring in do not state which tests they have passed, they need to be titled by the compliance team	Georgina Blair is aware of issue and looking for a fix
	7pt1 & 5 Take over stock unit & Datestamps - no issues	n/a
	59&60 NS&I - no issues	n/a
Lee Heil	Classroom should be made a specialist that is not to say that no one else should ever do it. All should be given the opportunity to cover if necessary. We feel it gets watered down if it is not done for a while,	Every FTM should be able to deliver a Classroom course and is the role of FTL to manage the activity and performance of each individual to ensure they can perform this role confidently. If they were too introduce

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	and this is not fair on the delegates.	'Specialists' it would restrict us to the number of courses run and the location. Currently we have scheduled FTM to deliver classrooms that have not done them for a while but these often revert back to the FTM that performs them regularly and we also have to schedule the other FTM for shadowing thus doubling up resource.
	Time needs to be allocated to ensure materials are up to date in CTO long before prep day as not enough time to get up to date POPOS especially if OOD material missing in prep box.	This would increase days allocated to classroom and would reduce resource available. This cannot be done too early as the materials will be out of date for the course but a possible solution would be that the heath and safety check is carried out at the CTO which every 3 months. The materials could be checked during this visit.
	Keep the sessions so that just 1 FSA can do the whole course rather than in the past having 3 FSA's to do modules 1,2 and 3. Works well and is easier to resource.	As per description. It give consistency for the delegates and allows the FTM's to work well across the 6-8days
Linda McLaughlin	Lose 30 Giro Practical - Can be covered better in daily revision	isolated comment
	18 RM Inland mail - slide 16 unnecessary. Slide 17 unnecessary in conversations handout slide 26 unnecessary slide 38 as slide 17	no change, useful for re-iteration
	RM Inland Mail Session - Not enough time scheduled	capture until quarter 4, new timetable may be imminent
	Royal Mail 1st & 2nd Class / Rec Del/Special Delivery (18) The slides from 1-22 are correct and should follow on with Royal mail 1st & 2nd which helps the delegate to get used to using post office labels etc as this would be the first time they would be using the horizon icons , printer, cash etc.	changed to keep
	Recorded Delivery and Special Delivery would be easier to cover on day separately. To cover all three sessions above in 2.30 is difficult.	capture until quarter 4, new timetable may be imminent
	Session 18. Revisit the order of the slides, mail segregation and cop are mentioned with special delivery and should be in with the first and second class slides, because neither cop or mail segs applies to special delivery.	No change.
	Mails revert to 1st,2nd recorded, special as way of introducing products	No change.
	18 RM Inland mail - Slide 8 untidy. Slide 9 too many words, this could be mostly notes	Slide 8 untidy: no change required> 9 - could reduce and move to notes?
	28pt1 Santander Deposits - no issues	Updated
	28pt 2 Aps/reversals - no issues	Updated
Sandra McBride	Lose all out of date material being sent to CTO and in prep box.	Upon further investigation it appears some of the Financial Services leaflets have been out of date. I have discussed this with Stock Services and instead of the item list being checked on an Adhoc basis this will now be checked on a weekly basis and any out of date items will be replaced

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		in the Training Stores. Also the Travel insurance leaflet was missing from the box, which has now been added.
	Prep boxes have missing handouts/brochures.	Email sent to Adrian for more detail
	Could the sub postmasters be issued with a simplified version of the toolkit that was given to WH Smiths managers, we think this would save on interventions.	Unfortunately the answer is No. Most of the information is available on Horizon Help and in hard copy format the toolkit would go out of date very quickly so is deemed as a Business risk. It would also be costly to produce and maintain.
	DDA pack – is it sent to the office or do they just inherit one? Or could they have one sent to them with the joining instructions so we can cover it in the classroom.	The DDA Pack is posted out to the new agent by HR as part of the Welcome Pack.
	Embed DVD's into the sessions. Example – mails session DVD session 18. This was very advantageous.	Yes, this is possible if the DVD's are available in electronic format.
	Prep boxes - out of date leaflets included within.	Email sent to Pete for more detail
	With the current format we can tell delegates' How to do something and let them do it on the horizon terminal. But we cant "Show Then" in a full classroom could we have a spare kit in the classroom are more HOL screenshots in the PowerPoint presentations.	This would be too costly to have spare kit and there is currently no budget available. Each delegate has their own kit to be able to navigate themselves.
	80 Feedback & Closure - Last few slides could be in a better order.	Slides rearranged and added to EASE
	There are many areas as a ctc trainer that I have had to deal with in a short period of time, and its then we build up the rapport with the new delegates, if we know they have left the course happy and understood , then the transition will not be so daunting.	Observation - Emailed David to discuss with contributor
	It would be nice to have a CA to sit in on a session to see how delegates are doing on the course, but understand they are busy, but we have to pick up the pieces when they are struggling.	Observation - Emailed David to deal with (invite CA to attend WTL?)
	It would be useful to ask a member of the Sales Team to take a 1½ - 2 hour session on sales as they are more experienced than us.	All of the team received training on the new sales sessions from a member of the Sales Team in the spring. The Sales and Service Team are revising conversations which will be ready for Q4 then we will look how it impacts on the sessions.
	Would like to see a place where comments can be left by the on site trainer, e.g. Subpostmaster generally very good however there was an issue when his Paystation crashed three times in one day or Subpostmaster had his rubbish stolen whilst I was on site. This would assist with the PTC process as whoever was completing this element would have an understanding of any problems the Sub was having.	Email sent to Chris G to add to PSA or discuss other suggestions

On Site		
Stakeholder	**Change requested**	**Output**

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Chris Fayers	Change Minimum Service Standards (conversations) - No problems with these personally but most new entrants seem to want to ask the questions in their own way. Then, at later visits, the correct conversations are rarely heard.	The conversations are under review by the Sales Team. At present these are the agreed standards from the Sales team who have stressed that, whilst certain words could be changed, the overall meaning has to stay the same to ensure consistency. We can only monitor them whist they are in training (onsite or classroom) so if they change the words after that we can't tell. On a positive note it is better to have a level of sales conversations in the branch, even if they are not worded as originally intended. As long as they are compliantly done I would not see it as a waste.
	Minimum Service Standards (conversations) - Is it just me? I've tried to instil the correct conversations into the folk I've trained but they all want to 'say it their way'. Then at later visits, all of the work done on these conversations is proved to be a waste since they are not having them as they should be.	The conversations are under review by the Sales Team. At present these are the agreed standards from the Sales team who have stressed that, whilst certain words could be changed, the overall meaning has to stay the same to ensure consistency. We can only monitor them whist they are in training (onsite or classroom) so if they change the words after that we can't tell. On a positive note it is better to have a level of sales conversations in the branch, even if they are not worded as originally intended. As long as they are compliantly done I would not see it as a waste.
Dave Ogleby	Pre-Training Checklist - Could the following be added to the list – Are all forms and leaflets the current versions? If not, can you please order the current versions before the Branch Transfers? (This will aid and encourage new PM to practice conversations)	Yes - can be added straight away
Chris Gilding	PSA Alter PSA so if you mark a subject as Red then a comment feeds through to the action plan (make it the same as the CAT reporting tool).	PSA Updated so that Name and Branch from Cover Page flow through to Action Plan. On site tab has button to click if any RED items appear, these will then flow through to the Action Plan. New tab added for PO Local on site.
Julia Mann	Lose Ready To serve - This is something the Subby may do for a couple of days and then it's just going to be forgotten about. Maybe it should be a 'once a week' task, just like checking scales is, and not every day.	Some areas are now Weekly activities and not Daily. Retail Standards were used to define what should be Daily & Weekly, also I sought feedback from Mark Lawrence. Some activities have been added together where they were similar and a new Daily activity has been added - Confidential waste destroyed as per guidelines. New version is V1.2 December 2011.
	Ready to Serve - Change to a form that is completed once a week (Monday)	See above
	Change Ready to Serve Document so that it is completed weekly rather than daily, by the end of week 1 the Subpostmaster just goes down the list and puts a tick against whatever was ticked the previous day without reading the question and consequently the form loses it value.	See above
	Ready to Serve document is useful for new agents to prepare themselves. Maybe not to be used on a daily basis when they are	See above

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	more used to the job, but new agent feedback has said as an intial aid it was very useful.	
	Keep Ready to Serve - This requires the Subby to do a check every day which is too much and not really required. As a result, they tend to do it for about a week or two and then forget it. It would be better if it were a 'once a week' task and maybe the completion of it should be checked at audit.	See above
Pete Jackson	SPMR Self Audit - No problems with this	• These are positive comments – No action required
Lee Heil	Change the staffing levels at some PO Local's. It is impossible to train out back on and all the sales assistants and keep the branch from being error free.	No change as Classroom courses for PO Locals being introduced during rollout.
	Onsite too short at times - Once the transfer audit is done, the balance is shown on a Wednesday and a half day Saturday there is not always time to cover topics	Standard training package. The training package would have to increase. Forms part of this review.
	Change - Transfer day-even if transfer audit is efficient (cash/stock neat/tidy/well presented)-delays on transfer of deeds/funds due to solicitors/banks can make it a late opening (or even next day). Can funds/deeds be transferred the day before?	Not a bad idea but there are problems that arise from this. .ie. Who has access to building, keys, security. It is more often than not agreed with both the outgoing and incoming of their transfer date and it would have to be made clear to them that the deeds/funds should be transferred the day before. This has been done before but it meant that transfers were arranged for Wednesday afternoons and at 5.30pm to allow deeds/funds to be transferred. This still caused problems as with any sale of business or house it all depends on when the funds transferred.
	When training on site hours tend to be longer than when auditing so can accrue quickly. Also time to prepare handouts, /finish audit reports / fill in PSAs /Action Plans needed,& especially with FUB now a longer activity much longer -. I suggest day after FUB as an admin day (if a late balance how do you get 11 hours break if an early audit start required), and a prep day before. If last day on site is a Wednesday, an audit Thursday AM is again inadvisable.	This would reduce the resource available to achieve the Audits plan and accommodate transfers and classroom/onsite training and any other BAU activity. It is better to conduct audits on a Thursday following balance and TP. It is the responsibility of the FTL to manage the performance and activity of their team and should flag this up to NSA team as an exception but this would not be the rule.
Sandra McBride	Introduce the sales model to Sub Pm and coach them how to coach their staff by using the science behind the conversations. Also how to run focus days and staff warm ups	The Sales and Service Team are revising conversations which will be ready for Q4 then we will look how it impacts on the sessions/training.
	I haven't really done that much on-site training, however I don't see there is much change here. The main issue I think on site is training a new PM to run a well managed branch and some time in a classroom setup going through basic routines, i.e. Remittances, MVL procedures etc I am sure would be useful, let's call a one day induction.	Email sent to Chris G for more information
Rita Kendellen	PO Local - General - Completing the transfer and then expecting the branch to open in the afternoon is a very optimistic expectation. In all but a handful of cases the money transfer for the business does not	Understand what is being said and the importance of maintaining a survive for customers is key. To transfer in the afternoon and start training the following day would require extra resource. To be able to

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	take place until at least 2pm on the day of the transfer and it is quite often later than that. Once the money has transferred the incoming is then pulled in all directions, trying to learn from the outgoing what all the keys open and close, learning the locking up process, how the tills work, dealing with stock takers, removal men, agreeing meter readings, putting beds together so the children have somewhere to sleep that night, numerous phone calls from the bakery/ milk/ newspaper supplier wanting to set up accounts etc etc. The last thing they want to do serve in the PO. So you either get the staff running the branch, which is OK as you can get them coached in minimum sales standards (if required) but this could obviously be completed later in the week However as the on site FSA you want the new Subpostmaster and it is very rare to see him/her. If a single person branch you get a very harassed person who wants/needs to be elsewhere and he/she takes nothing in. No matter how much you stress on the pre transfer telephone call what the expectation is in my experience it does not happen successfully very often, I feel we should go back to lunchtime transfers and leave the PO closed pm. As branches are generally busier mornings that afternoons anyway less customers would inconvenienced. Branches were there are staff or the Sub wants to could still open after the transfer once the money has gone through and it would make better us of FSA time as we would not need to attend until lunchtime in all but the busiest branches where it may be beneficial to go a bit earlier. We would not to sit around for at least half a day and sometimes considerably more awaiting the transfer of funds. I am of course aware that there would be an additional cost of one day on site training if it was decided to stick to the same delivery package as at present, but this would in my opinion be justified as the value of day one on site in terms of training is generally worthless.	understand if late opening is a big issue a question will be added to Transfer SharePoint for Qtr 4 to identify the time the office opened to the public following the transfer. This will allow the gathering of information and be able to make the appropriate decision based on fact.

Post Transfer Contact		
Stakeholder	**Change requested**	**Output**
Pete Jackson	Lose cash check at PTV, the office will be audited with in the first 9 months	• A cash check has to be done at every visit
	I don't think the current procedures are relevant when the branch transfers from one nominee to another and the staff remain in place. Much of the one month and three month contact questions simply do	• The questions are to establish good working practises are in place as well as monitoring the new Agents progress

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	not apply.	
	Lose the 1 month phone call. (four people commented on this)	• To remain - contradicts other views and offers vital support
	Lose the one month phone call and the PTV at three months and change it to a PTV at one month and PTA at 6-9 month stage. Generally if a Subpostmaster is struggling with a particular element it will have raised itself by one month, it is much easier to sort out problems on site rather than over the telephone, if additional training/ support is required the Sub may be reluctant to ask for it over the telephone but on site you can see the issue. It seems daft to me to leave it until the 3 month visit if the Sub tells you over the telephone that everything is fine at the one month stage.	• Schedule and T&S will not allow a 1 month visit unless after the call it becomes an intervention issue due to problems the office is having issues
	If three elements of PTC are to be maintained then the questions should be less repetitive. What is the point of asking at one month "are you aware of the Helpline to assist you" then repeat the question at the PTV and PTA. If know about the Helpline at the one month stage then they obviously know about at PTV and PTA so why ask again it just makes us look unprofessional. The questions should only be repeated if there was gap last time.	• Questions have been reviewed and made less repetitive.
	PTV's are important and add value, but due to the size of the teams now, and their geographical spread, it's unrealistic to schedule them to the FTLs. I've had some FSAs complete some for me, and also ran a training session and shadowing for FCAs, a couple of whom have done some visits for me	• NFSA's carrying out PTV's has been addressed.
	This is from a SPMR, via Kendata, and although they're not an internal stakeholder, thought I'd include it anyway: "As the audit and Post transfer visits were conducted on the same day I was not pre-informed. Had I known I would have made provision for another member of staff to be present as I happened to be alone on that day and therefore not an ideal situation. Otherwise the visit went well."	• States in the reviewed instructions that if it is impractical to carry out the PTV after the audit then the NFSA to make arrangements to re-visit.
	Amend for Locals – especially for PTV re sales & remuneration	• Already addressed
	1-month call - Would be better as a visit	• Schedule and T&S will not allow a 1 month visit unless after the call it becomes an intervention issue due to problems the office is having issues

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	6-9-month audit - Too much to cover with Audit, Cat questions & PTC questions	• States in the reviewed instructions that if it is impractical to carry out the PTV after the audit then the NFSA to make arrangements to re-visit.
	1 month call - PTC – A visit is more beneficial on the 1 month PTC. A phone call is not always convenient to the subpostmaster.	• Schedule and T&S will not allow a 1 month visit unless after the call it becomes an intervention issue due to problems the office is having. If not convenient arrange a time that is.
	Only completed one of these as yet, but it felt too soon to be contacting the PM, he hasn't had a chance to get into the role. I think it would be better to make these calls at the 2-Month stage.	The phone call will be made 4 weeks after the FUB
	Do Compliance at 3 month PTV then gaps can be picked up at Post Transfer Audit	Added to process
	Kendata forms do not fit the process as there are times when all we are having is a chat.(Two people commented on this)	Although it is in the form of a chat all the points on the Kendata form should be covered
	Change 1 month phone call to six weeks after FUB	The phone call will be made 4 weeks after the FUB
	Change - Follow up visit sooner to ensure weaknesses' shown on-site can be corrected sooner rather than later i.e. ATM, Lottery, Sales, cash management. Possible reduction in number of interventions required.	• If apparent problem established at 1 month Phone call. Organise an Intervention Visit
	Visit is extremely useful to get genuine and honest feedback, however it is not best use of FTL's time and generates high t&s costs because of the areas covered. Perhaps they could be scheduled for the FSA and then the FTL to pick up at least 2 per six months for each of their FSA's to complete to get this feedback on their performance	• NFSA's carrying out PTV's has been addressed.
	The whole process has impressed the agents I have been involved with.	• These are positive comments – No action required
	The PTV at the three month stage works well with the FTL being able to access the performance of the FSA as well as being able to deal with problems and issues raised my our new Postmasters.	• These are positive comments – No action required
	3-month visit - No problems with this	• These are positive comments – No action required
	Pre – Transfer Contact - No problems with this	• These are positive comments – No action required
	A great opportunity to engage with spmr and find out how they are doing. This provides a quick healthcheck and gives them a chance to air their views and concerns. (Four people commented this way)	• These are positive comments – No action required
	Self audit pack a brilliant idea but make all the questions . E.g. Question 38 "my staff and I are competent in knowledge of NS&I products" this should be a specific question to test knowledge. E.g. If Premium Bonds are purchased on 3rd December which month will	• The question is designed for Spmr and their staff to become conversant with products but nothing to stop the NFSA/NFSTL asking specific questions such as stated to verify their knowledge. Will need to be reassessed in the near future with changes to NS&I.

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	they be eligible for the draw?	
	Potential to select a more bespoke option for smaller branches, especially for Island branches. Perhaps forego a face to face 3 month visit, replacing with a phone call and spending longer onsite at 6-9 month audit.	• This needs to be done on an individual basis.
	1 month Call - These calls can be difficult. You cannot see if the Subby has a queue and if it really is convenient to be talking with him. A visit also allows you to check on the general running of the office in the most crucial early stages e.g. is he/she doing everything right. Any problems can be resolved quickly which, under the present procedure, would not be spotted until the 3 month visit.	• Already stated why a 1 month phonecall against a visit. The phonecall needs to be arranged with the Spmr to be at a convenient time for them. This has been added.
	6-9 month audit - There is rather a lot to do at this audit and it all takes a long time. It can be very difficult to ask all of the questions, and talk about everything that we have to, whilst the Subby is trying to serve customers.	• States in the reviewed instructions that if it is impractical to carry out the PTV after the audit then the NFSA to make arrangements to re-visit.
	DDA Accessibility Guidance Pack - The PTC document states the following on the front page, and is an action at the 1 and 3 month contacts - *All New Agents must complete DDA Self audit contained within Guide prior to PTV visit. Completion is also a condition of appointment. At the 3 month visit* This is also always a Condition of Appointment. However I have completed at least 19 PTV's and not one PM has ever seen sight of this document. I always end up emailing the PM a copy after my visit. This needs to be looked in to and a copy need to be with the PM ready for when they start at their brach – either sent by HR or Contract Advisors.	• Recruitment are emailing this to the new Spmr along with the Recruitment Pack. This is being addressed.
	New procedure for follow up balance at 6-9 months is a good idea and PTC process is quite straight forward to follow. Also Sub Pm self audit and Ready To Serve doc as been received well	• These are positive comments – No action required
	3 month PTV, should not be restricted to FTL only, should be utilised as a development opportunity for FSA. Also due to geographical location these visits can be extremely costly without making best use of FTL time. Feedback on FSA could be obtained by phone based on Kendata feedback etc if required	NFSA's carrying out PTV's has been addressed.
	I can't comment on the PTV as I haven't done one, however the phone call is good as issues can be picked up quickly. As to the audit, again this is good as it picks up any problems, however, would it not be better to do a compliance audit at the 3 month visit and use the actual audit at the 6 month stage to gauge whether any gaps have been closed. This can then be seen not so much as finding fault but as part of the training and support. Most new PM's want to have a	Added to process

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	well run compliant branch and will take this seriously. The real concern would be if they haven't closed the gaps by the 6 month period.	

Issues		
Stakeholder	**Change requested**	**Output**
Sandra McBride	Set-up a group to change and test what goes on EASE. People using the system regularly should control more of what is on it and where it goes.	New items are tested prior to being added to EASE. To make this more visible I will inform team of who tests new documents /processes via the Audit Update, etc.
	I find EASE so cumbersome and out of date. This is the starting point of all the other bits, so needs to be user friendly and up to date.	We will be moving EASE to SharePoint in the next few months where it will be updated. There will also be a much more efficient Search facility. Further feedback will be sought then as we do currently.
Lee Heil	There is not enough information on the Intervention Request form / have found the visit unnecessary on arrival. (Two people commented this way)	Information is provided by the requestor on a form to the Branch Support team. Pat Bursi updates SharePoint with this information and can only go off what is provided. For every intervention a phone call should be made to the branch to determine what is required and whether a visit is required or not. Alternatively a call should be made to either Pat Bursi or the requestor who may be able to explain a bit further.
	I know we use Mondays etc when free to update ourselves, but occasionally preparation time and keeping up to date should be scheduled.	No change as this should be scheduled by the team leader
	I know we use Mondays etc when free to update ourselves, but occasionally preparation time and keeping up to date should be scheduled.	No change as this is the responsibility of the Team Leader to manage performance and activity of the FTM.