

# Release 1

## Training Needs Analysis

# 1 Document Administration

- 14 July 2016

Revision Number	Revision Date	Summary of Changes
V 0.0 (DRAFT)	15 April 2016	DRAFT Version – structure only
V 0.1	22 April 2016	Section 1 – Introduction – Risks added Section 2 – Lessons Learned – Summary of Findings added
V 0.2	29 April 2016	Section 4 – Lessons Learned Section 5 – Release Specific Challenges Section 8 – Business as Usual impact
V 0.3	06 May 2016	Section 3 – Introduction Risks removed from Introduction. Now standalone Section 4 – Risks Section 7 – Audiences Section 8 – Branch Colleagues - Learning Outcomes, Delivery and Evaluation Section 9 – Non-branch Colleagues – Learning Outcomes, Delivery and Evaluation Section 11 – Path to Training Strategy Appendix Reviewer feedback from v0.2
V 0.4	18 May 2016	Reviewer feedback from v0.3
V 0.5	17 June 2016	Approver feedback from v0.4
V 0.6	23 June 2016	Re-structure and modifications due to change in Release 1 scope (descoping of AML ID Capture; change in approach for Screen Sharing, and Speed to Market)
V 1.0	14 July 2016	Approved Section 8.3 updated as HNG-A will now run on Windows 10

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## Review and Sign-off Timescales

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24 June 2016	Re-write due to change in Release 1 scope v0.6 released to approvers
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## Referenced Documents

Nr.	Title	Version	Date	Document Ref.	Location
1.	Training Needs Analysis (Release 1) v0 5 (2016 06 15)	0.5	15 June 2016	Release 1 TNA (v0.5)	

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## 3 Introduction

### 3.1 Executive Summary

Post Office is undertaking a major transformation of its systems, hardware and networks. The first release of planned updates to the current Point of Sale software, referred to throughout as 'Release 1', forms part of the broader Branch Technology Transformation Programme (BTTP), and is focused on enhancing or improving existing functionality, or in some areas introducing new functionality. At present, the following work packages are being considered for inclusion in Release 1:

- Enhanced User Help and Support
- Branch Messaging
- Enhanced User Management
- Improved Transaction Journeys

This Training Needs Analysis (TNA) is focused on supporting the successful implementation of Release 1, based on our current understanding of the proposed work packages and changes. Any significant changes to the implementation plan within the programme will need to be revisited in the development of any Training Strategy.

Previous versions of this TNA (v0.5 and earlier) were developed when a number of different work packages were under consideration for inclusion in Release 1, specifically:

- Screen Sharing
- AML ID Capture
- Improved Levels of User Configuration ('Speed to Market')

These work packages are no longer under consideration, and will not be addressed throughout this version of the document. If these work packages are considered for inclusion in future releases, the most current information regarding the proposed training approach can be found in the Release 1 TNA (v0.5).

#### 3.1.1 Training Summary

For the work packages under consideration, learning will be delivered through a combination of eLearning activities, workbooks and workshop style training, covered by face-to-face delivery, webinars and Skype sessions.

- Branch colleagues will be provided with an eLearning activity and associated assessment for each of the 4 work packages. This eLearning will need to be accessed on the learners' own devices, as we do not currently have the capacity to provide eLearning at the Point of Sale.
- Branches may also receive a hardcopy workbook which mirrors the content of the eLearning activities, and will be required to complete any knowledge assessment at their Point of Sale.
- Non-branch colleagues will be provided access, as required for their role, to any eLearning activity and associated assessment.
- A number of groups of non-branch colleagues have been identified as requiring additional learning - for example, certain NBSC colleagues will require additional technical training to be able to author and maintain content for Enhanced Online Help and Support. These groups will be provided a blended solution, including additional eLearning activities, and workshop-style learning.

Additional detail regarding these audiences, and the specific learning outcomes associated with each work package can be found throughout this document.

### 3.2 Release 1 training context

Post Office has a commitment to improve training content and delivery for all branch colleagues. This will be achieved through a greater focus on eLearning and reporting against individual user IDs. However, the infrastructure required for these improvements will not be in place for BTTP Release 1.

The improved training approach will help to mitigate some of the current challenges when delivering branch colleague training, and will include an eLearning portal where all branch colleagues will be able to access training materials and compliance tests, 24 hours a day, 7 days a week and the training will be recorded and reported against the individual's training record. A number of things must be in place to make this happen;

- A Learning Management System (LMS) – it is expected that this will be delivered as part of Success Factors, the new HR system. Training content and compliance tests will be migrated to this platform. If the Success Factors LMS is not available at the time of implementation, it is recommended that we investigate using our existing Totara system, for Release 1. There may be an additional cost component here, to allow for more licences to provide sufficient access for colleagues to complete their training.
- Unique User IDs – this will be delivered as part of BTTP Release 1. HR Service Centre will create a unique user ID for each Point of Sale user and this will be linked to their compliance test and training records.
- Access via the Point of Sale – when the new Point of Sale equipment has been deployed in branch, it will run on the Windows 10 enterprise operating system. The new operating system could allow access via a browser to the new training portal, making all training content available at the Point of Sale terminal.

An LMS will be utilised as part of Release 1, meaning that eLearning content can be made available; however, without the benefits of Enhanced User Management and access via the Point of Sale we cannot depend on eLearning as the main means of delivery.

As a result, the 4 Release 1 work packages under consideration will be delivered using a mixture of eLearning activities, and more traditional delivery methods, including workbooks, and workshop style delivery (incorporating face-to-face training, webinars and Skype learning events). A key Post Office training design principle is to develop training content once and make it available to all audiences that need to complete it. As such, all relevant workbooks and eLearning will be made available to branch colleagues and non-branch colleagues, although hardcopy workbooks will only be delivered to branches.

### 3.3 Training Needs Analysis Summary

This TNA document is to support the successful delivery of Release 1. The TNA is part of the wider programme of activities under the BTTP, preparing colleagues for the upgrading of branch technology.

The TNA identifies who needs training and in what form, in order to successfully:

- implement this rollout,
- use any new functionality of the Horizon system, post-implementation,
- support users of Horizon, post-implementation

A programme of communications will need to support the training programme to ready those who will need training, and to provide context and updates for those who will be affected by implementation or any changes. This TNA document will identify which areas fall under the scope of Training, and which may fall more comfortably into Communications. As our understanding of the proposed changes develops, this separation may change; the final communication and strategy approach will be provided in the Training Strategy. The final training strategy will reference where communications is needed in relation to training. Any linked communications and learning strategy and plan will need defined and agreed between both communities

The TNA document identifies all affected audiences, and a proposed high-level solution for training delivery and evaluation, with a particular focus on the 2 broad audiences of branch and non-branch colleagues. It also identifies any risks, challenges and issues specific to this Release and their associated mitigation strategies.

In addition to ensuring the effective training of existing colleagues, the Training team is also responsible for ensuring all Business as Usual (BAU) and on-boarding materials are updated, so as to

remain accurate after any proposed changes, and fit for use in training any new colleagues. This document will outline the affected materials, which include workshop trainers' notes, eLearning modules and training aids, and the proposed strategy for ensuring they are updated to time, ensuring compliance and quality standards are maintained.

There are critical interdependencies with the other programmes, both within the BTTP and the broader transformation landscape, specifically EUC Branch and the implementation of the Success Factors LMS; however, training needs, delivery and co-ordination of anything outside of the Release 1 solution is not in scope.

This document does not provide detailed information regarding specific content of training materials, deployment plans or timelines, which will be covered in the Training Strategy document. The Training Strategy will be developed during the Design phase of the programme, and finalised once the package of changes has been confirmed and approved, and the Build phase has begun.

### 3.4 Training Scope

This Training Needs Analysis is based on the information available at the time it was written. It is acknowledged that identified needs, audiences, outcomes and delivery methods may change as a result of developments throughout the Design and Build phases of the programme. These changes will be considered in the development of the final Training Strategy.

#### In Scope

- Training material will focus on training changes to the current system processes and its appearance and layout where these changes are introduced. Training provided to existing colleagues is not designed to be a solution for new entrant training (hereafter referred to as Onboarding).
- Only work packages currently under consideration for inclusion in Release 1 will be considered in scope for this Training Needs Analysis
- Updates to new entrant training will be managed separately as part of the training team's responsibilities and will be addressed in this document.
- Training will be provided to both branch (including agents and their staff) and non-branch colleagues
- Colleagues will be trained so they can use all new functionality to perform their roles on day 1 of go-live and have access to material to support this usage.

#### Out of Scope

- Training delivery is focused on Post Office colleagues (including agents and their staff), or those external suppliers who will have direct contact with Post Office colleagues only. Training in the full technologically integrated end to end process e.g. system integration with Post Office clients and other Post Office systems is out of scope.
- The Training Team is responsible for the update of all BAU training materials. The update and maintenance of operational support resources, such as Online Help and HR Help, are not in scope
- The Training Team is responsible for providing training to any designated Floorwalkers or Early Life Support (ELS). The provision of training resources to act as either Floorwalkers or ELS is not in scope
- This TNA is solely focused on the work packages and changes proposed for inclusion in Release 1. While this document is written with consideration to the overall impact of the BTTP, any training solution for EUC Branch, Simple to Run Networks or other programmes are out of scope and will be addressed in separate documents
- Work packages which have been removed from consideration from Release 1 (specifically AML ID capture, Speed to Market and Screen Sharing) will not be considered in scope for this TNA
- This TNA will not outline detailed curriculum, content, timeframes or responsibilities. These areas will be addressed in a final Training Strategy, which will be developed during the Build phase of the programme.



## Who

The training solution will focus on providing a suitable level of training for:

- Current active users of Horizon, specifically those who have completed business as usual product and system training and are already in branch.
- Colleagues providing support and training to current users of Horizon, including but not limited to NBSC advisers or Field Support Advisers.
- Other colleagues affected by process changes, resulting from work packages included in this Release, including but not limited to HR Service Centre colleagues and Security colleagues.

## How

Training will be developed in line with the Post Office's strategic approach to training, which is:

- A blended learning approach, with a drive towards greater use of eLearning.
- Design once, deliver to many
- Digital by default, available any place anytime and through any device
- Only do in the classroom that which can only be done in the classroom
- A recognition of the continued need for workbooks, to meet the needs of different learning styles. This need will continue to be delivered on a sliding scale as our transition to eLearning continues, leading to their removal or use by exception
- A commitment to make training available to all agency colleagues as well as postmasters (though postmasters will still be responsible for ensuring that their staff are trained appropriately).

The ability to provide eLearning through Point of Sale depends on a Windows platform, which in turn depends on the installation of new kit. This is being delivered through the EUC branch programme and is not expected to be available prior to the implementation of Release 1, which means that training will need to be delivered in a manner similar to our historical BAU training, rather than utilising a more technology-enabled solution. This will be addressed throughout this document.

## 3.5 Design Principles

To maintain a consistent approach across the organisation as a whole, training will be developed in line with the general design principles used across the broader Post Office L&D function, utilising existing Learning Academy templates, so that all materials are immediately recognisable to colleagues as a learning initiative. This will ensure a consistent and recognisable presentation, and set up systems to support further deployment of training across the broader Branch Technology Transformation Programme.

1. Training material, including existing training materials which will require updating, will accurately reflect the new processes.
2. Training will be delivered in 'bite-size' modules. This will allow for completion over a period of time and in parallel with operational requirements.
3. Training material will adhere to the 70:20:10 learning model, and designed to suit visual, auditory and kinaesthetic learning styles
4. Training material is made available a minimum of 4 weeks prior to go-live for end users to complete their training in good time, allowing for the completion of approximately 30 minutes or material per week. Depending on the overall amount of training to be completed, learners may be provided more time.
5. Any training material will be easy to access and repeatable. This will support an end user's need to repeat modules and reinforce learning.
6. Training will be designed once.
7. Classroom training will be kept to a minimum and reserved for the most complex needs and areas which can't be appropriately delivered through other delivery methods.
8. The look and feel of all training material will be in line with Post Office Learning Academy corporate branding.

9. Training will be tracked to ensure completion and evaluation activities will be completed to assess effectiveness.
10. Training will be role-based and will follow an 80 / 20 rule. Training material will prioritise its focus on what an end user needs to know to do their job. (i.e. 20% of the things they need to know to do 80% of their job).
11. Post Office colleagues will be involved in the design and / or review of training materials.
12. Training will be positive and current, supporting communications and helping colleagues feel confident about the associated benefits of the change.

### 3.6 Training Objectives

Overall, the training provided for Release 1 is an enabler to help the Post Office meet its modernisation objectives, specifically:

- Reduce costs
- Grow and support the Network
- Improve end user productivity
- Improve customer experience

These feed directly into Post Office's Strategic goals to be:

- Simpler to Run
- Better for Customers
- Great to Work For

### 3.7 What good looks like

In order to set the highest standards for delivery, the training will be developed to deliver against the following measures:

- Training will have minimal impact on time away from counter, service or operational delivery, while still ensuring that it meets the learning need.
- Postmasters and branch managers will be trained to a level where they are able to support their colleagues.
- Branch and Support colleagues will be trained to a level where they are able to continue to deliver their current role.
- External suppliers will be trained to a level where they are able to fulfil their responsibilities, with minimal impact on Post Office colleagues, customers or operational delivery.
- All colleagues undergoing training will be able to prove their competence by completing a test / knowledge check.
- From a colleague perspective, the training will feel aligned and integrated with the communications and support which has also been made available.

## 4 Release Specific Challenges and Activities

Under the original Front Office Application solution, IBM were responsible for delivering the programme training work stream in collaboration with the BTTP training team. Specifically, IBM were responsible for;

- providing resources for the design, development, testing and delivery of training modules and materials,
- the delivery of training to support service colleagues,
- the IT infrastructure to host and deliver eLearning and reporting on training completed.

In the current Fujitsu solution, these training responsibilities now fall to Post Office.

To deliver all elements of the training work stream that IBM were due to provide, there are a number of challenges specific to the deployment of Release 1 that must be addressed before the training can be developed and delivered. Once they have been defined or sourced they will be able to be re-used for all subsequent BTTP releases. The areas are summarised in this section.

### 4.1 Learning Management System (LMS)

Under the original BTTP approach, the hosting of all eLearning materials on a Learning Management System (LMS) was to be the responsibility of our supplier partner. Without this LMS to support eLearning and user reporting, the Branch Technology Transformation Programme (BTTP) will be responsible for providing one. For Release 1, this creates the particular challenge of determining an appropriate solution and ensuring that it is established in a way that is fit for purpose.

This raises several challenges which will be dependent on timelines and cost.

#### 4.1.1 Success Factors

Post Office is in the process of implementing an HR solution, Success Factors, which amongst other things will be functioning as a Learning Management System. At present, there are some questions still unanswered around the alignment of the implementation dates of Success Factors and Release 1.

If the release of Success Factors LMS is confirmed to be in advance of the Release 1 training schedule, then it will be the best option for the implementation of the BTTP eLearning and reporting platform. Using Success Factors will still involve a certain amount of set-up activity to ensure that the platform is suitable for use for BTTP.

Without the benefits of Enhanced User Management, which is to be released as part of Release 1, a significant piece of work will need to be completed to identify potential users of the system, and ensure that are able to register and complete appropriate training using the LMS.

The training team must also develop a solution to combine reports from a number of sources (Success Factors, and Horizon Online test data) to provide accurate data around training completion, in lieu of a single integrated solution.

#### 4.1.2 Alternative Solution

If Release 1 is scheduled to be implemented before Success Factors, the release of any eLearning training will require us to consider alternative LMS platforms, such as Totara, which currently supports BAU eLearning, or the procurement of an external LMS specifically for this release. Any such solution will incur additional costs to the programme which will need to be factored into these decisions.

Any such procurement will require the team to develop a set of business requirements, in conjunction with the Learning Academy and business needs, to be used in identifying a suitable supplier. In addition to the standard requirements of a modern LMS, Post Office will need to ensure that these requirements pay attention to issues particular to organisation, for example, that the solution is able to cater for a large number of concurrent users.



Once procured, there will be considerable work required to ensure the LMS is appropriately branded for BTTP, that users can be registered to access the platform and that there is a reporting tool in place to track learning throughout the implementation of training.

In addition to these setup requirements, once Success Factors has been implemented, there will be an additional piece of work around the migration of information from the Release 1 LMS onto Success Factors, so that training results can be accessed and audited, and that materials can continue to be accessed and updated for future training needs.

## 4.2 User Management and Reporting

Enhanced User Management is currently under consideration for implementation as part of Release 1. In the absence of these improvements to user management, the present data sources cannot provide a robust list of all users working within branches.

Prior to the commencement of training for Release 1, the team will need to complete a significant amount of research to identify the number of colleagues in each branch, so that we are able to report and record training data to the best of our capacity. The completion rates of all training assessment activities will need to be compared against this data, to ensure that we can properly identify where training has not been successfully completed and ensure appropriate follow-up is completed. The programme will determine the acceptable completion rates per branch, based on this information, as at this stage, without Enhanced User Management, it is not believed that Post Office will be able to gather or record training completion data at an individual user level.

Until the implementation of both Success Factors and enhanced User Management, there is no way of being able to integrate data from training delivered through eLearning and Horizon into a single data set, meaning that additional manual reporting will need to be completed to ensure that our reporting is adequate for auditing purposes.

## 4.3 Procurement and Supplier Engagement

A number of areas of delivery will need to be outsourced to external suppliers. In some cases, this may be a matter of using an existing supplier, however given that the scale of the work to be delivered, and the fact that these suppliers will be required across multiple releases, it is in the best interest of the programme to spend time identifying training requirements across the entire BTTP programme (not solely Release 1) and complete an exercise to determine suitable options.

### 4.3.1 eLearning

For enhancements made to the Point of Sale (PoS) system, the design, development, testing and implementation of all eLearning training modules is now the responsibility of Post Office. As a result, the BTTP training team need to work with Post Office Learning Academy to identify and procure the services of an eLearning provider who will have the expertise to build, test and report on the eLearning deliverables.

### 4.3.2 Printing

There is a business requirement to print and distribute workbooks that mirror the training content available on any eLearning modules. The BTTP training team need to identify and engage the services of an external printer for Release 1 and all future releases. The high level printing requirements need to be documented, specifically identifying what branches will need to receive materials and how many copies. The internal communications team will assist with the identification and engagement of a suitable supplier, which would typically be an existing, approved supplier.

### 4.3.3 Training Consultants

Many of the changes proposed throughout the life of the BTTP will also impact Support Centre colleagues. Where this involves significant behavioural change or technical elements, additional resources and expertise may be needed to develop this training and deliver it through a blended solution including self-study, Train the Trainer and workshops. BTTP training may need to procure the

services of external training consultants to assist with this work, depending on the material required. For example, there may be a requirement for a training consultant with expertise in call-centre specific behavioural training to train NBSC advisers on the appropriate use of the new Screen Sharing functionality.

## 4.4 Training material setup

### 4.4.1 eLearning system design

In line with the Learning Academy ways of working and design standards, the BTTP training team need to define the high level requirements of the eLearning system and work with our chosen eLearning supplier to agree the system layout, design and functionality. This includes working with the Learning Academy to agree to the use of standard templates for eLearning material, which will be branded specifically for the BTTP and will be available for use for all future releases.

### 4.4.2 Workbook templates

BTTP training must work with the Learning Academy- to develop a workbook template that can mirror the eLearning training content. These must adhere to learning principles and brand standards, and must be developed in advance of any content development. Once completed, these templates will be used throughout the remainder of future BTTP releases.

## 4.5 Ways of working

To ensure that the training work stream can be delivered for the programme to time, cost and quality, it is the responsibility of the BTTP training team to define how to engage with the programme, training stakeholders and external suppliers. This work will include; defining the ways of working, roles and responsibilities, creating process maps, setting up a standard document set and templates, developing an outline training plan showing milestones, critical path and indicative timelines and also having indicative costs. All of this will inform decisions and inform planning for future releases.

### 4.5.1 Training team ways of working

The responsibility for the development and delivery of all the training documentation including the Training Needs Analysis (TNA), Training Strategy and Training plans for BTTP now falls to the Post Office training team. As such, the team need to define how they will work with BTTP to deliver the training work packages. Specific deliverables are:

- Define and document the training processes and procedures and how they link to the specific stages of the release life cycle
- Create template documents for:
  - Training Needs Brief (TNB)
  - Training Needs Analysis (TNA)
  - Training Strategy
- Define and document a training plan with key milestones and critical path activities to inform the BTTP plan

### 4.5.2 eLearning supplier ways of working

The training team will be procuring the services of an eLearning supplier and as a result need to define and document the agreed ways of working. Where this involves engaging a new supplier, this will mirror existing Learning Academy best practice, and include:

- Processes and procedures for the design of the eLearning templates
- Processes and procedures for the development and delivery of training modules
- Indicative timelines for development and delivery of training content

Indicative costings for development and delivery of training content to help inform decisions on training delivery method used.

#### 4.5.3 Printing supplier ways of working

The training team will be requiring the services of a print supplier and as a result need to define and document the agreed ways of working. This should include:

- Processes and procedures for ensuring materials printing and distribution
- Accurate timelines for printing and delivering training materials
- Accurate costings for printing and distributing training materials

## 5 Audiences

A number of distinct audiences have been identified as being affected by the proposed changes in Release 1. The tables below outline individual audiences, approximate numbers and locations for these groups. These audiences have been grouped by role type so as to identify populations who interact with Horizon in similar ways and may require similar training.

The individual learning outcomes and proposed delivery methods for these audiences will be outlined in Sections 8 and 9 of this TNA.

### Branch Office Managers

Managers of Post Office branches, who use the Horizon system to serve customers, balance cash, access reporting functions and provide training support to counter colleagues

Role	Audience Name	Number of staff in the audience	Location (s)
Branch Manager	Crown Branch Managers	Approx. 321	Branch locations, throughout UK
Postmaster	Agency Postmaster	Approx. 9200	
Branch Manager	Agency - WH Smith	Approx. 109	
Branch Manager	Agency - Multiples e.g. McColl's, One Stop, Tesco etc.	Approx. 1909	
Branch Manager	BFPO	Approx. 30	UK and Overseas locations

### Branch Colleagues

Branch Counter colleagues, who use the Horizon system to serve customers

Role	Audience Name	Number of staff in the audience	Location (s)
Counter Colleague	Crown Colleagues	Approx. 3400	Branch locations, throughout UK
Counter Colleague	Financial Services & Mortgage Colleagues	Approx. 280	
Counter Colleague	Agency Colleagues	Approx. 50000	
Counter Colleague	BFPO	Approx. 30	UK and Overseas locations



### Non-branch colleagues (Support)

These colleagues may use the Horizon system in a support capacity but also review product and balancing transactions to provide help and support services to branch colleagues.

Role	Audience Name	Number of staff in the audience	Location (s)
Support Services	Network Business Support Centre	70	Currently Dearne. Moving to Chesterfield
Support Services	POL Management Information team (NBSC)	2	
Support Services	NBSC Managers	13-14	
Support Services	Model Office	2	Finsbury Dials London
Support Services	Finance Service Centre	155	Chesterfield
Network	Branch Standards	30	
Security	Fraud Analysis Team / SAR Processing Team	11	
Security	Financial Crime	5	Finsbury Dials London
Security	Operations - Field Investigators	15	Chesterfield, Bolton, Finsbury Dials London, Field Based
Security	Operations - Intel Team	6	
Security	Operations - Admin	4	
Security	MLRO / Head of Security	1	Finsbury Dials London
Field Manager	Crown/WH Smith Area Managers	6	Field Based
Field Manager	Crown/WH Smith Business Development Managers	20	
Field Support	Field Support Advisers	159	
Field Support	Area Sales Performance Managers	49	
Field Support	Crown Sales Trainers	12	
Support Services	Resolution Team	4	

### Non-branch colleagues (additional)

These colleagues do not use the Horizon system as part of their daily tasks, but have been identified as being affected by other process changes as a result of Release 1.

These numbers will need to be reconfirmed when developing the final training strategy as the organisation goes through transformation, teams are changing and therefore roles and responsibilities could change.

Role	Audience Name	Number of staff in the audience	Location (s)
Support Function - Awareness	Managed Services	TBC	Finsbury Dials London

<b>Role</b>	<b>Audience Name</b>	<b>Number of staff in the audience</b>	<b>Location (s)</b>
Commercial and Financial Services	Product Managers	23	Finsbury Dials London
Support Function - Awareness	Contract Managers	14	Field Based
Field Manager	Regional Managers	4	
Field Manager	Area Managers	6	
Field Manager	Team Leaders	14	
Field Manager	Regional Managers	2	
Field Manager	Regional Sales Development Managers	6	
Field Support	Field Change Advisers	24	
Field Support	Field Change Advisers - Area Managers	4	
Change Management Team (CMT)	PMs PMOs BAs - skills group (23) Central (7) Others (2)	32	Chesterfield & London
CMT - contractors	Business Analyst	17	
CMT - contractors	Project Manager	27	
CMT - contractors	PMO	24	
CMT - contractors	Programme Manager	5	
CMT - contractors	Programme Director	4	

## 6 Branch Colleagues - Learning Outcomes, Delivery and Evaluation

### 6.1 Introduction

The assessment of the training needs for branch colleagues, which include branch managers, postmasters and counter colleagues, started during the Core Services workshops run by the BTTP. In consultation with the Network SMEs and Business Readiness Leads (BRL), a Training Needs Brief (TNB) was drafted and reviewed for each work package. The TNBs were used to provide a very high level assessment of branch colleague training needs.

To create a full Training Needs Analysis (TNA), the BTTP training team held a series of workshops with Network SMEs and BRLs to review the TNB information, identify any changes or decisions which had been made since they were first created, and gather the additional information needed for the TNA. These workshops were carried out with Paul Garnham and Angela James. It was agreed that Paul Garnham will be the reviewer of all training content for branch colleagues and Kevin Seller will provide sign off.

### 6.2 Challenges for delivering training to branch colleagues

There are a number of challenges for delivering training to all branch colleagues;

1. There are approximately 60 000 branch colleagues working in 11 500 branches across the UK and some British Forces Post Office (BFPO) branches outside of the UK. Any training content must be made available across this geographical spread.
2. There are 25-30 BFPO branches and approximately 10 BFCT branches (British Forces Counter Training) located in the UK and overseas. BFPO colleagues can access the current eLearning modules and BFPO trainers deliver the 3 day classroom training course, using training materials supplied by the Post Office. These training materials are supplied to a single UK location and despatched by BFPO to the classroom locations. This means that all training materials including changes to the classroom training materials must be supplied in a timely manner to allow BFPO to train colleagues on the system changes, allowing additional time for the despatch of training to the overseas locations.
3. Training must be delivered with minimum disruption to customer service, as this impacts our customers and potentially branch income.
4. For branches with 1 or 2 counter positions, it may be difficult to release branch colleagues to complete training without affecting customer service. At present the following numbers of branches have the listed counter layouts:

1 Point of Sale terminal (including outreach)	Approx. 4100 branches
2 Point of Sale terminals	Approx. 2875 branches
3 or more Point of Sale terminals	Approx. 4525 branches

5. The new Main and Local operating model has increased the opening hours of a Post Office within a retail outlet. This has increased the number of system users that require training and the working hours when they are available to complete their training. This means that training material must be available to all branch colleagues 24 hours a day, 7 days a week to fit their work patterns for example, some users may just work evenings or weekends.
6. The Post Office Learning and Development department have adopted the 'Digital by Default' principle and are working towards providing a wide range of eLearning modules as standard. For branch colleagues, the first step has been to convert all new entrant product training to eLearning, reducing the classroom training to just 3 days. However, this new approach currently relies on the postmaster using his own device and internet connection to access the system. This method cannot be relied on for BAU training delivery across all branch colleagues. This is only familiar to postmasters, and nominated colleagues who have joined since 2015, therefore the majority of learners are unfamiliar with this.



7. There is no access to external training content or material using the current PoS equipment. Colleagues are able to view workbooks on Horizon Online Help. However they are only available as read only and are not interactive, nor can they be paused and returned to at a later stage. The printing of workbooks from Horizon Online Help can only be done one page at a time using the A4 printer, which is time-consuming and expensive, and the assumption that this is happening consistently constitutes a risk to the programme. As a result, branches will need to be provided with hardcopy workbooks to ensure that they have access to training materials.

### 6.3 Learning Needs by work package

There are currently 4 work packages under consideration for Release 1 that will impact branch colleagues. They are:

1. Branch Messaging
2. Enhanced User Help and Support
3. Improved Transaction Journeys
4. Enhanced User Management

The final content of Release 1, including the list of successful work packages and final learning outcomes are yet to be signed off and finalised. As part of developing the final training strategy, stakeholders will be engaged for each audience to ensure the content within this document is still correct and to identify any further changes that will need to be addressed.

#### 6.3.1 Branch Messaging

The current Memoview system will be replaced with a more engaging and dynamic system that will target different audiences and prioritise message criticality. Content will be able to be delivered using different fonts, colours and sizes and can include embedded pictures and links to material to be hosted on Horizon Online Help. Additionally, there will be greater controls in place to force and track message acknowledgement.

##### Key Changes

- All new Branch Messaging system with new functionality, including the process for reading, acknowledging and responding to messages at a branch level
- Measures will be in place to restrict branch colleagues from completing certain actions until priority messages have been acknowledged
- A new business process regarding how content will be created, managed and published by Post Office
- New reporting on message consumption for branch colleagues and content owners

There are 2 main Learning outcomes that will need to be delivered for branch colleagues:

Learning Outcome	Learners will:
System training and new features	<ul style="list-style-type: none"> <li>• Be familiar with all new features</li> <li>• Be able to use new functionality</li> </ul>
Reporting	<ul style="list-style-type: none"> <li>• Be able to run reports on messages received and read receipts</li> </ul>

#### 6.3.2 Enhanced User Help and Support

Horizon Online Help will be replaced with a system that is easier to use, with an intuitive search engine that will make it quicker for branch colleagues to locate the information they are looking for. The look and feel, layout and navigation of the solution is likely to be changed entirely.

Feedback from stakeholders has identified that the current Online Help is underutilised, due to concerns at branch level about its effectiveness. An important output of the training of this work package is not just a functional ability for colleagues to use the system, but an ability to recognise the benefits of the new solution and a willingness to use it.

##### Key Changes

- An all new Help system with new features and functionality, including context-sensitive help, integrated search engine
- Look and feel, layout and navigation will be entirely new to users
- A new business process so that content is owned and managed by Post Office business owners
- A new business process regarding how content will be managed and published by Post Office

There are 2 main Learning outcomes that will need to be delivered for branch colleagues:

Learning Outcome	Learners will:
System training and new features	<ul style="list-style-type: none"> <li>• Be able to navigate the new system and features</li> <li>• Be able to use the new functionality</li> </ul>
Reporting	<ul style="list-style-type: none"> <li>• Be able to run the help system reports</li> </ul>

### 6.3.3 Improved Transaction Journeys

The final list of improved transactions journeys that will be part of Release 1, or the final journeys themselves, have not been confirmed yet and as a result this TNA does not cover the impact of each change. This will be confirmed when the Training Strategy for Release 1 is completed.

The improved transaction journeys being considered are:

- Rod Fishing Licence
- Travel Insurance
- Verify ID
- Travel Bureau (Buy On Demand)
- Mails (Sell)
- Bill Payments
- Standard Retail Product
- E-Top Up
- Travel Bureau (order and collect)
- Mails (accept and collect)
- Postal Orders
- Post Office Payout
- National Lottery

#### Key Changes

- A reduction in transaction steps. Where a transaction might take 10 steps in the current system, it might only take 5 steps in the enhanced system.
- New system features or functionality. Where a screen might be complex due to a high number of possible options to select in the current system, the enhanced system might have a cleaner screen with fewer options.
- A change to the sales conversation. Where a transaction flow has changed, the sales conversation must change to match the new system steps.

For each improved transaction journey the training outcome for branch colleagues will be broadly the same:

Learning Outcome	Learners will
New screen layouts, transaction flow and process steps	<ul style="list-style-type: none"> <li>• Be able to successfully use new features and functionality</li> <li>• Be able to successfully navigate new transaction flow</li> </ul>
New sales conversations to fit the new process steps	<ul style="list-style-type: none"> <li>• Be able to conduct successful sales conversations for any product which has changed</li> </ul>

### 6.3.4 Enhanced User Management

The enhanced user management system will allow the HR Service Centre to receive an electronic request for a security check for all colleagues who want to work in branch, and create a unique User ID for all branch and non-branch colleagues. This will allow Post Office to have visibility over all personnel cleared to serve in a branch and whether they are compliant to do so. User IDs will be linked to colleague training and compliance records on Success Factors, and will allow for colleagues who are not compliant to be restricted from serving particular products. User IDs will be transferable, meaning that colleagues will be able to work in multiple locations, and retain a single ID and training record.

As it has shifted responsibility for creating new users from the branch and has made it a central function linked to training records, it is expected that branch users will have questions. The training materials should pre-empt these concerns, however Support services such as NBSC, Trainers, Auditors, and HR Service Centre etc. need to be able to respond appropriately to branch colleagues who question the rationale for the change to the user management process.

#### Key Changes

- This will be an all new User Management process managed via the HR system, Horizon Online and the Network Business Support Centre (NBSC)
- For all non-crown branches the Postmaster must submit a P250 electronically to get the new colleague security checked and a new User ID created.
- HR Service Centre will be responsible for the creation and administration of all Horizon Online users including processing all P250 applications, creation of new User IDs, setting initial passwords, setting user roles and setting users access rights.
- HR Service Centre will be able to report on training compliance against each User ID and the system will automatically restrict access to system transactions if the user has not successfully completed the required training.
- HR Service Centre will be able to reactivate users who have been archived on the system, if that user returned to the business.
- Branch users will be able to unlock their ID and reset their passwords via the PoS by answering security questions
- NBSC will be able to unlock users and reset passwords for branch users if the self-service option has failed.
- Branch manager / postmaster will be able to assign User IDs to their branch to allow an approved user to work in their post office.
- Branch manager / postmaster will be able to change the user role allocated to a User ID in their branch i.e. clerk, supervisor or manager role
- Branch manager / postmaster will be able to restrict access to specific transactions for each user in their branch.
- Security and Audit manager investigating branch issues will be able to see User IDs against system transaction to aid investigations.
- All Post Office colleagues will be affected by this change, as all are expected to support branches during peak periods and must be compliant to work in branch.
- User IDs for Computacenter engineers and BFPO engineers will be created by Fujitsu Services and will not follow the new HR process. User IDs for all other BFPO personnel, is still under discussion and may also fall outside of the process.

There are 5 main learning outcomes that will need to be delivered for branch colleagues:

Learning Outcome	Learners will:
New User ID process & reporting	<ul style="list-style-type: none"> <li>• Understand the new process</li> <li>• Be able to reset their password</li> <li>• Be able to unlock a user ID</li> <li>• Be able to use the new reporting capability, relevant to their role</li> </ul>
Migration process for all existing users	<ul style="list-style-type: none"> <li>• Understand the new process for creating new IDs and passwords</li> </ul>

<b>Learning Outcome</b>	<b>Learners will:</b>
Submitting P250s electronically (Postmasters only)	<ul style="list-style-type: none"> <li>• Be able to submit a P250 for all new users</li> </ul>
In branch - user management (Branch Managers and Postmasters only)	<ul style="list-style-type: none"> <li>• Be able to add a user to the branch</li> <li>• Be able to allocate a role to a user ID</li> <li>• Be able to restrict transactions on a user ID</li> </ul>
Security/ Audit investigation – reporting (Branch Managers and Postmasters only)	<ul style="list-style-type: none"> <li>• Be able to access Reports available to support investigations showing user ID against transactions</li> </ul>

## 6.4 Summary of branch colleague training

For the 4 work packages under consideration for inclusion in Release 1, eLearning modules will be made available on the LMS and branch colleagues will be encouraged to make use of this training resource using their own device and internet connection. The eLearning will be engaging and interactive, so we anticipate that this will help to convert more branch colleagues to eLearning, which will be the preferred method of training delivery for future releases. This is in line with our strategy of digital by default, and recognises the additional impact that Enhanced User Management will have on driving learners to eLearning content

Branches will also be sent an agreed number of hardcopy training workbooks. To ensure that the user has understood the key information contained in the training, they will be required to complete a multiple choice quiz on either Horizon Online. A report compiled from data from Horizon Online and the LMS will be used to monitor branch completion of the training. Colleagues who require more than the benchmark number of attempts to pass training will be flagged, and weekly reminders will be sent to branches as necessary, where training completion does not reflect our understanding of colleague numbers in the branch.



## 7 Non-Branch Colleagues - Learning Outcomes, Delivery and Evaluation

### 7.1 Introduction

For the purposes of this Training Needs Analysis (TNA), non-branch colleagues are defined as Post Office colleagues that work in an administration or support function, who are either based in one central office location or work in a field-based role. Examples of non-branch colleagues include Product Managers in Finsbury Dials, HR Service Centre colleagues in Bolton and Field Support Advisers who support branches across the whole of the UK.

When identifying the appropriate delivery methods to meet the training needs of these groups, the diversity of the roles and location mean that eLearning would be preferable to workshop and other face-to-face learning as it would be more easily accessible and cost-effective, and disruption to services could be kept to a minimum. However, it is important to consider that workshop learning will be required for some technical instruction, whether it be through direct facilitation via face-to-face classroom learning, through Skype or webinars; Train the Trainer or early life support using champions or specialists within the specific audience.

Costs for workshop training can be minimised by selecting a central location and combining work packages and audiences, when face-to-face training is specifically required; or utilising a technological solution such as Skype or webinars, whenever possible. A technologically enabled solution provides additional flexibility for mopping up purposes, can also be used effectively for new joiners, and can have an impact on reducing cost. Face-to-face training becomes more cost and time efficient when we are in a position to deliver training for multiple work packages and multiples audiences in a single session. In the scenario that an audience only requires face-to-face training on a single work package, or where further packages may be removed from the scope of Release 1, it would be more beneficial to consider a technologically enabled solution. These decisions will be made as part of the final training strategy, where the final shape of Release 1 is confirmed.

Where reference is made to Floorwalkers and/or Early Life Support, these resources will be provided by the programme. It is not the intention of the Training Team to act in these roles, but rather to ensure that those colleagues who are functioning in this capacity are adequately trained.

### 7.2 Delivery and Evaluation

This section has been broken down into sub-sections by non-branch colleague type. To avoid duplication, audiences that have been identified as requiring the same training delivery method have been grouped together. Each confirmed sub-group contains a table which shows the expected training method for every training outcome based on our current understanding of the proposed changes.

As the final solution design is not yet available, these learning outcomes are yet to be signed off and finalised. As part of developing the final training strategy, stakeholders will be engaged for each audience to ensure the content within this document is still correct and to identify any further changes that will need to be addressed.

When discussing evaluation, all proposed learning activities, regardless of delivery method, will include learner feedback surveys or 'happy sheets' to determine the colleague response to the learning, in line with level 1 of the Kirkpatrick methodology of training evaluation. Similarly, all learning activities will include knowledge assessments (either through Horizon, eLearning or at workshops) to identify knowledge uplift and evaluate the effectiveness of the learning against level 2 of the Kirkpatrick model. For individual work packages listed below, we have started to identify potential means of gathering data to evaluate level 3 and 4 effectiveness (behavioural change and business impact). At this stage, these remain high level proposals only and will need to be further investigated as part of the training strategy, once more information is available regarding the specific nature of the changes. As with any

Level 4 evaluation, Learning will own a percentage of any uplift (with this to be determined with the appropriate department head) but is not responsible for any overall improvement to performance.

## 7.3 Network Business Support Centre (NBSC)

### 7.3.1 Introduction

The NBSC has been identified as requiring training for all 4 work packages, which are:

- Enhanced User Help and Support
- Enhanced User Management
- Improved Transaction Journeys
- Branch Messaging

A workshop was carried out with Nigel Davies and Alison Clark, who identified Gayle Peacock and Kendra Dickinson for sign off.

Within the NBSC, there are several sub-groups of audiences, which are provided in the table below. Each group will require training based on specific Learning outcomes.

Subgroup	Colleagues
NBSC Managers	13 colleagues
POL Core Management Information team	2 colleagues
Contact Centre Advisers	53 colleagues

### 7.3.2 Learning Outcome/ Method: NBSC as Single Audience

The following table shows the Learning outcomes for each of the relevant work packages, where all of the NBSC may be treated as a single audience. The detailed training content for each training outcome can be seen in the appendices.

Learning Outcome by Work Package	Learning Delivery Method						
	eLearning	Workbooks (based on eLearning)	User Guides	Workshop	Train The Trainer	Floorwalkers/Early Life Support	'How to' Videos
<b>Enhanced User Management</b>							
New User ID process & reporting	X						
Migration process for all existing users			X				
Submitting P250s electronically	X						
NBSC – user administration			X	X			
In branch - user management	X						
Security/ Audit investigation – reporting			X	X			
Objection Handling			X	X			
Floorwalker/ELS preparation			X				
<b>Enhanced User Help and Support</b>							
System training and new features	X						

After discussion with the stakeholders at our workshop, all NBSC colleagues will be required to have knowledge and understanding of the learning outcomes listed, in order to be able to carry out their

day-to-day role. As such, eLearning has been identified as the most suitable option, as colleagues can be released in small groups to carry out the training at a convenient time, causing minimum impact on branches requiring the NBSC service.

Where user guides, workshops and early life support have been identified in the table above, these will only apply to those specifically carrying out the tasks; however, all colleagues need to be aware of their role within that process. For example – all colleagues will need to be aware of the process for migrating all existing users to the new system. However, only the team responsible for completing the migration activity will need to know how to carry out the process.

As all colleagues will be required to unlock passwords within Enhanced User Management, it would be cost-effective to combine all workshop training for each work package, but structure it in a way that as the time passes, colleagues can return to their BAU role while those remaining continue with processes relevant to them. This will be better defined and confirmed in the final strategy once the design has been finalised and signed off.

There is a possibility that objection handling instructions could be included within standard screen prompts, which would remove the need for this to be covered as part of Release 1 training. However this is still unconfirmed and will be finalised in the final training strategy.

### 7.3.3 Learning Outcome/ Method: NBSC Sub-Groups

The following three tables highlight Learning outcomes for specific sub-groups within the NBSC which are in addition to the core training listed in the previous table:

Sub-group: POL Core Management Information Team

Learning Outcome by Work Package	Learning Delivery Method						
	eLearning	Workbooks (based on eLearning)	User Guides	Workshop	Train The Trainer	Floorwalkers/Early Life Support	'How to' Videos
<b>Enhanced User Help and Support</b>							
Reporting	X						
New business process for Help content creation and maintenance			X	X			
System training on content formatting, publishing, deleting etc.			X	X			
Floorwalker/ELS preparation				X			

The POL Core Management Information team are responsible for keeping the current NBSC Knowledge Base up-to-date. This will continue on the new system whether it remains as Knowledge Base or is to be replaced with the Enhanced User Help solution. The NBSC will be the owners of the Enhanced User Help system and this team will be responsible for the content.

Face-to-face training with the support of a user guide could take place at Chesterfield to minimise costs, combining all work packages. In line with Learning Academy principles, face-to-face training will be kept to a minimum, only doing in the classroom that which can only be done in the classroom.

Sub-group: NBSC Managers

Learning Outcome by Work Package	Learning Delivery Method
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	eLearning	Workbooks (based on eLearning)	User Guides	Workshop	Train The Trainer	Floorwalkers/Early Life Support	'How to' Videos
<b>Branch Messaging</b>							
System training and new features	X						
Reporting			X				
New business process for content creation and sign off			X	X			
System training on content creation, management, publishing, deleting			X	X			
Floorwalker/ELS preparation				X			

Branch messaging is replacing the current Memoview system, which will be owned by the NBSC and will remain the responsibility of the NBSC managers. Although other NBSC colleagues won't be responsible for branch messaging, the eLearning will be optional and would be for information only.

#### 7.3.4 Key Messages

The proposed changes represent a significant change in a number of areas, specifically User Management and the Help and Support offering. It is anticipated that there will be a certain amount of resistance from some branch colleagues, so NBSC colleagues will be trained to understand the benefits to branches that these changes will bring, and be ambassadors for these changes to branches.

NBSC advisers should be clear on potential objections, and be able to handle them effectively and positively. For example, if an advisor is asked to handle an objection relating to Enhanced User Management, they should be able to provide the benefits to branch colleagues and the rationale behind the decision.

#### 7.3.5 Evaluation

As with all face-to-face training, learners will be asked to evaluate their workshop and complete pre- and post-workshop knowledge tests. In addition to this, there will be knowledge tests embedded within the eLearning modules designed to assess learning uplift. This type of knowledge check is in line with levels 1 and 2 Kirkpatrick training evaluation methodology.

Quality call checks completed at NBSC take place on a monthly cycle. This method will continue to be used for the training of Release 1 material, in order to assess Level 3 performance. If the NBSC is provided business performance metrics in response to these changes, the Training Team will claim a percentage of this performance (to be determined) in order to provide validation for Level 4 evaluation. However, the training team is not responsible for the performance of NBSC colleagues post-implementation.

The use of reporting to assess the effectiveness of learning will depend on the final design and having an understanding of what reports will be available. This will be re-addressed with stakeholders when the final training strategy is produced, however it is expected that the training team will identify call handling times, error and complaint rates when assessing training effectiveness.

## 7.4 Human Resources Service Centre (HRSC)

### 7.4.1 Introduction

HRSC colleagues have been identified as requiring training as part of the Enhanced User Management work package only. A workshop was carried out with Hector Campbell and Samantha Williams who were identified as stakeholders for HRSC.

### 7.4.2 Learning Outcome/ Method

There are 5 main Learning outcomes that will need to be delivered to and the detailed training content for each outcome can be seen in Table 2 of the appendices. The following table shows the expected training delivery method against each of the identified Learning outcomes:

Learning Outcome	Learning Delivery Method						
	eLearning	Workbooks (based on eLearning)	User Guides	Workshop	Train The Trainer	Floorwalkers/Early Life Support	'How to' Videos
New User ID process & reporting	X						
Migration process for all existing users*			X				
Submitting P250s electronically	X						
HR - user administration			X	X			
Floorwalker/ELS preparation				x			
Objection Handling	X						

*\*Currently, HRSC colleagues have been tentatively identified as the team migrating all existing users to the new platform, however, this has yet to be confirmed and a migration team might be created elsewhere within the business. If that is the case, this training outcome will remain but be moved to a different audience*

Due to the fact that the Enhanced User Management system will be completely new to the HRSC team and involve changes of process, technology and behaviour, it would be recommended that they receive an element of face-to-face training by way of direct face-to-face delivery and early life support. This method will be supported with a user guide, which will also be used by the migration team to transfer the existing user information to the new system.

Costs for face-to-face training and early life support can be minimised, as HRSC colleagues are all based in one central location (Bolton). The single location and small number of colleagues that will require training means that it will be relatively easy to arrange – 4 colleagues out of a team of approximately 14 are consistently responsible for the current paper P250 process and supported by the remaining 10 colleagues. A core team of those 4 colleagues will require 4 hours training, which could be followed up with a second 4 hour session on the same day to train the remaining colleagues, if required.

### 7.4.3 Evaluation

While performance is monitored, there is currently no official report in place for new or existing staff to identify accuracy, which would be used as part of a learning evaluation. This is largely due to limited HRSC resources and reporting functions being available and the fact that processes have remained largely unchanged for approximately 25 years. However, existing monthly performance measures used through the HRSC, identifying complaint numbers and error rates, could be included in a post-implementation review, to take place approximately 8-10 weeks after go-live.

There is no sign off or final design to be able to create a definite means of evaluation at this point, but as part of developing the final training strategy, stakeholders will be engaged to identify the reports that will be available in order to monitor accuracy and impact of learning.

## 7.5 Security Team

### 7.5.1 Introduction

Information gathering workshops were held with stakeholders Paul Blackmore (SME – AML ID Capture), Chris Hardy (SME – Enhanced User Management) and Sharon Rai in preparation for this TNA. Sally Smith and Amy Quirk have been identified for sign off and the following sub-groups were identified within this audience:

- SAR Processing/Fraud Analysis team
- Financial Crime
- Operations – Field Investigators
- Operations – Intel team
- MLRO/Head of Security

Each sub-group has been identified as requiring training on specific Learning outcomes from 2 of the 4 work packages, which are:

- Enhanced User Management
- Branch Messaging

### 7.5.2 Learning Outcome/ Method: Security as Single Audience

The following table shows the learning outcomes for each of the relevant work packages, where all of the Security sub-groups may be treated as a single audience. The detailed training content for each training outcome can be seen in the appendices.

Learning Outcome by Work Package	Learning Delivery Method						
	eLearning	Workbooks (based on eLearning)	User Guides	Workshop	Train The Trainer	Floorwalkers/Early Life Support	'How to' Videos
<b>Branch Messaging</b>							
Horizon system training and new features	X						
Reporting			X	X			
New business process for content creation and sign off			X	X			
Floorwalker/ELS preparation				X			
<b>Enhanced User Management</b>							
New User ID process & reporting	X						
Migration process for all existing users			X				
In branch - user management	X						
Security/ Audit investigation - reporting			X	X			

As part of workshops carried out with Shaun Turner, Angela Saul and Jane Smith about Branch Messaging, the security team were identified as requiring training for branch messaging. This is due to their current role in the sign-off processes of particular pieces of content, which have been identified as



having a security slant. They will need to be aware of their role in the new sign-off process as well as how to use reporting functions to identify open/acknowledged messages, in the case that this information is needed for a security case. The level of access available to the security team is as yet undetermined, but will be addressed at the design phase of Release 1 and this information will be incorporated into the final Training Strategy.

The training will be a combination of eLearning for convenience and the ability to track learning and face-to-face training, which can involve all work packages' content being combined into one face-to-face training package to minimise costs.

When the new Horizon Online User IDs are created via the Enhanced User Management system, there will be a migration process to switch from the old IDs to the new. This migration process could be resourced within the security team or a separate resource created specifically to carry out this activity. However, this has yet to be decided and will be re-addressed once the design has been signed off and the volume of work required can be investigated.

### 7.5.3 Evaluation

It has been identified that BRLs will maintain contact with stakeholders after Release 1, so training can engage with BRLs through the post-implementation review process to gather qualitative feedback. Once the final solution has been confirmed, training will be responsible for identifying the means by which to evaluate level 3 effectiveness.

## 7.6 BAU Training and Field Support

### 7.6.1 Introduction

This audience includes the Crown Sales Trainers and Field Support Advisers who support colleagues in different branches and have been identified as requiring the same training. They have been identified as requiring training for all 4 work packages, which are:

- Enhanced User Help and Support
- Enhanced User Management
- Improved Transaction Journeys
- Branch Messaging

### 7.6.2 Learning Outcome/ Method

The following table shows the learning outcomes for each of the relevant work packages, where all of the training and support team may be treated as a single audience. The detailed training content for each training outcome can be seen in the appendices

Learning Outcome by Work Package	Learning Delivery Method						
	eLearning	Workbooks (based on eLearning)	User Guides	Workshop	Train The Trainer	Floorwalkers/Early Life Support	'How to' Videos
<b>Enhanced User Management</b>							
New User ID process & reporting	X						
Submitting P250s electronically	X						
In branch - user management	X						
Objection Handling			X	X			

<b>Enhanced User Help and Support</b>							
Horizon system training and new features	X						
<b>Improved Transaction Journeys</b>							
New screen layouts, transaction flow and process steps	X						
<b>Branch Messaging</b>							
Horizon system training and new features	X						

As highlighted in the introduction of this chapter, the location spread for these colleagues means that eLearning would be preferable to face-to-face learning because it would be more easily accessible, cost-effective and disruption to services would be kept to a minimum.

Objection handling has been identified as being delivered through face-to-face training, as it can be combined with other face-to-face training from other work packages for similar and centrally located audiences. As such, it's unlikely to be included in the eLearning modules, so may have to be relayed back to the training and support teams via Comms. This will be re-assessed when the design has been signed off and discussed with stakeholders as part of the training strategy.

### 7.6.3 Evaluation

In addition to knowledge tests within the eLearning modules, each of the training and support teams currently have measures in place to see the success of their training in branch, which could continue to be used. For example, Field Support Advisers receive Ken Data Feedback from colleagues they are supporting in branch and it would be possible to find out if a branch required an intervention based on any of these changes being trained incorrectly through reporting. Additional methods will be sought and discussed with stakeholders once the training strategy is being finalised after changes have been confirmed.

## 7.7 Sales Team

### 7.7.1 Introduction

The sales team incorporates all teams that offer sales support to branches in the field, such as Area Sales Performance Managers, Regional Sales Development Managers, Sales Capability Managers, Regional Sales Capability Managers and the Guiding Coalition. They will all need to be aware of any changes made to transaction journeys for when they are in branch delivering coaching or training around transactions and sales.

All sales training material is produced by the Learning Academy who are aware of the changes and will be able to incorporate any relevant changes into their BAU material. Depending on the final complexity of change, it has been identified that additional training may not be required for this group and communication might be sufficient. Once the final changes have been finalised, we will re-engage with stakeholders from the Sales and Communications team to identify whether communications is sufficient to meet the needs of this audience. As this team is a first point of contact for many postmasters and colleagues, they must be provided sufficient knowledge to be able to support teams and redirect learners back to materials.

Should additional training be required, it will be possible for this audience to have access to any eLearning materials developed to provide a general understanding of changes for audiences such as the Training and Support teams.

### 7.7.2 Learning Outcome/ Method

There are 2 main learning outcomes listed in the table below for sales teams and the detailed content that will be learned can be seen in 4 within the appendices.

Learning Outcome	Learning Delivery Method
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	ELearning	Workbooks (based on eLearning)	User Guides	Workshop	Train The Trainer	Floorwalkers/Early Life Support	'How to' Videos
<b>Improved Transaction Journeys</b>							
New screen layouts, transaction flow and process steps	X						
New sales conversations to fit the new process steps	X						

Due to the diverse locations of all the sales team colleagues, it wouldn't be cost-effective to carry out face-to-face training on so little content. All training on transaction journeys for the sales team will be through eLearning and supported with a workbook. However, once the design has been finalised, if the changes are more complex than anticipated, the training method will be re-addressed with the stakeholders.

### 7.7.3 Evaluation

Evaluation for sales training can be determined through branch sales as a direct result of coaching received by a colleague who has been trained on the new conversations and process.

## 7.8 Product Teams

### 7.8.1 Introduction

This audience includes Product Managers and Managed Services who have been identified as requiring the same training for the Branch Messaging and Enhanced Help and Support work packages. This need was identified at a workshop held with Shaun Turner, Angela Saul and Jane Smith, where it was confirmed that based on current assumptions, these teams are content owners. This can be re-addressed with stakeholders once the final design has been signed off.

### 7.8.2 Learning Outcome/ Method

The following table shows the learning outcomes for each of the relevant work packages, where all of the training and support team may be treated as a single audience. The detailed training content for each learning outcome can be seen in the appendices.

	Learning Delivery Method						
	ELearning	Workbooks (based on eLearning)	User Guides	Workshop	Train The Trainer	Floorwalkers/Early Life Support	'How to' Videos
<b>Learning Outcome by Work Package</b>							
<b>Branch Messaging</b>							
System training and new features	X						
Reporting	X						



New business process for content creation and sign off			X	X			
Floorwalker/ELS preparation				X			
<b>Enhanced Help and Support</b>							
System training and new features	X						
Reporting	X						
New business process for Help content creation and maintenance			X	X			
Floorwalker support				X			

Due to the volume of people within this audience and the spread across teams within the business, although they are centrally located, it would be difficult to arrange lengthy workshop training without having an impact on their BAU roles.

However, it has been recommended for the new business process for content creation, maintenance and sign off for each work package, which will be combined to save costs. This piece of training is an engagement and support piece, because the new content needs to take advantage of the new functionality and be engaging for branch colleagues in order to drive take-up.

Due to the nature of content writing, which is on an ad hoc basis, floorwalking has been identified as unsuitable. However, the content owners will require some form of early life support. A proposal is that colleagues based in the same central location are trained as champions or experts, who can be called upon for assistance when needed, providing support and expertise on the new system, when content needs to be created, without requiring the designated resource of a floorwalker throughout early life support.

### 7.8.3 Key Messages

Fundamentally, this training is designed to encourage users to make use of the new functions and to be more engaging in their content so as to drive branch acceptance of the new system

The message for Enhanced Help and Support needs to be that using the new Help system will be 'easier than picking up the phone' – the content owners need to keep the content up-to-date and make use of the new functions to be more engaging.

### 7.8.4 Evaluation

The measure for the effectiveness of the training for this audience would depend on the reporting available as a result of the expected changes. In addition to knowledge tests within the eLearning modules, quality assurance reviews could be carried out as a measure to see that the changes have been implemented in the new content. This will be re-addressed with stakeholders after the design has been signed off and the final training strategy is being created.

## 7.9 Other Audiences

A number of other audiences have been identified that will require some form of training depending on the work package and what is signed off at the design phase of BTTP. As such, they have been included in this document, but their needs will all be assessed with the relevant stakeholders once the changes are known and the final training strategy is being written.

The remaining audiences have been identified below with a brief description about potential training needs.

### 7.9.1 Branch Standards

Branch Standards currently use Horizon testing to track completion of compliance tests, and may need to be aware of the user management implications, and eventually reporting through the LMS. They have also been identified for Enhanced Help and Support sign-off based on the current process, however it remains unknown, if this will be the case in the new solution.



Branch Standards colleagues currently support approximately 200 branches each. In addition to maintaining a relationship with branches, they support initiatives such as the Guiding Coalition, to coach mails conversations. If these conversations are impacted by changes in Transaction Journeys, they may need training.

To summarise, the 3 work packages that this audience has been identified as needing training include:

- Enhanced Help and Support
- Transaction Journeys

#### 7.9.2 Enhanced Help and Support Sign-off

After a workshop carried out with Shaun Turner, Angela Saul and Jane Smith, three teams were identified as an Enhanced Help and Support signoff audience and they include:

- Communication team
- Network Gateway team
- Change team

This work package has yet to determine who will be signing off content, so it is based on audiences who are currently responsible for signoff. This may not be true in the new design solution, which means they might require information delivered as a communication rather than training.

#### 7.9.3 Finance Service Centre (FSC)

The FSC have been identified as a potential audience for the Enhanced User Management work package as they currently use reporting for cases with branches. As reporting is expected to change and colleagues can be tracked through their User IDs more robustly, the FSC may need training on how to do this. However, depending on what is signed off at the design phase, the change might be minimal and delivered through communication in place of training.

In addition, FSC may be affected by Improved Transaction Journeys if the resulting change to transaction flows has an impact on master data. At this stage, it is unclear whether this constitutes a trainable outcome, or can be handled through either communications or involvement in the design phase of the package, to ensure that process changes do not impact on the resulting data. This impact will be further investigated when developing the Training Strategy.

#### 7.9.4 Contracts Managers

Contracts Managers have been identified as a potential audience for the following work packages due to the nature of the changes having an impact on cases and contracts with Postmasters.

- Enhanced User Management

It is unknown at this time whether this will be addressed during the design phase with them directly or not. If this is the case, they are unlikely to require direct training, but may receive some form of confirmation by communication delivery. If it is identified that this audience requires additional training, they will be able to access the eLearning activities relevant to their work packages.

#### 7.9.5 Model Office

The model office based in Finsbury Dials currently falls under Gayle Peacock and Support Services. They are a live branch and are the first branch to go live when changes are built and rolled out.

When BTTP were aligned with an IBM solution, the model office colleagues were included in the design sprints, but have yet to be engaged in the new Fujitsu solution. If they are engaged at the design phase for the new solution and for testing in the model office, they will already know the changes in work packages relevant to them. However, their future level of engagement is unknown and if they aren't engaged, they will require similar training to the NBSC and Training and Support teams, which will predominantly be eLearning with workbooks.

In addition to the support the model office colleagues may receive as a non-branch audience, it is suggested that they receive the same training materials a Network branch will receive, as they are considered to be branch in their own right, as well as a support service. The final decision in this regard will be made by Gayle Peacock.

### 7.9.6 Migration Support Team

It is yet to be decided how this will be completed, however it has been identified that there will be work required for migrating information from old systems to new. This will either be carried out by the relevant team affected or by a migration support team set-up for the purpose of carrying out this migration activity. A migration exercise may need to be carried out for the following audiences/work packages:

- |            |                      |
|------------|----------------------|
| • NBSC     | Enhanced Help System |
| • HRSC     | User Management      |
| • Security | User Management      |

If any of the systems are changed at design signoff for the work packages listed, then the migration team will need to be trained earlier than system users. It will depend on the volume of information that will be migrated, if there will be a technical solution to assist them and the complexity of the process. The training materials they require to carry out the migration may need to be different to the user guides being used for learning how to use the new system, because the process might be different if there is a technical solution to assist the migration.

### 7.9.7 IT Support Engineers

This is an external audience who will be engaged once design has been signed off and the final strategy is being created. They have been identified as requiring training based on learning outcomes from the following work packages:

- Branch Messaging
- Enhanced Help and Support
- Enhanced User Management

This audience need to understand how these work packages are processed and in the event that something goes wrong, how to instruct a branch colleague to put it right or how to fix it themselves. As the systems will all be new, this will require training. The final decision regarding who is responsible for delivering this training will be confirmed in the Training Strategy.

### 7.9.8 Fujitsu Services

Fujitsu is an external audience that is currently responsible for the creation and maintenance of global user IDs for Post Office colleagues. It is unknown whether or not they will continue to carry out this process under the new Enhanced User Management solution. If they are still responsible for this process, they will need to complete training to be able to carry out the same administration and processes they do currently, but in the new solution. The recommended training method for this process is face-to-face with a user guide. The final decision regarding who is responsible for delivering this training will be confirmed in the Training Strategy

## 7.10 Conclusion

This conclusion aims to summarise the audiences and work packages by training delivery method.

### 7.10.1 eLearning

eLearning will be the main delivery method of training for new screen layouts, transaction flows and the system processes for all 4 work packages, which include:

- Enhanced User Help and Support
- Enhanced User Management
- Improved Transaction Journeys
- Branch Messaging

These eLearning modules will be available for all non-branch colleagues to access for information, but one or more structured workshops may be required for the following audiences to carry out their day-to-day roles:

- NBSC teams
- HRSC colleagues

- Security and Fraud Analysis teams
- Training and Support teams
- Sales teams
- Product Managers
- Managed Services

These workshops may be delivered face to face, or as part of a blended solution, utilising Skype or webinars as a means of reducing cost.

#### 7.10.2 Workshop

Where a business process has been identified as a training outcome, workshop delivery is recommended for 3 of the 4 work packages, which include:

- Enhanced User Help and Support
- Enhanced User Management
- Branch Messaging

Where possible, one of more of these work packages can be combined within the same delivery session for convenience, to minimise costs and to minimise impact on BAU roles. This will work particularly well for NBSC colleagues who are based in one central location and will require face-to-face training on each of the work packages listed above.

If structured well, due to the proximity of Bolton to Chesterfield, it could be possible for the Enhanced User Management session to be delivered to HRSC with the NBSC in one location. HRSC colleagues could attend just for the session they require.

Where possible, a technologically enabled solution (such as Skype sessions or webinars) will be used, in order to reduce cost and provide additional flexibility.

There will be no face-to-face training for audiences who are field-based due to the cost and impact this will have on their BAU roles.

## 8 Business As Usual Impact

### 8.1 Introduction

Business as Usual (BAU) learning materials have been identified as requiring updates as a result of the changes expected from Release 1 and future releases. These materials will require updating to ensure that new colleagues have access to current and correct information as part of their training from Day 1.

This section will also identify any additional impact which the Release will have on BAU and on-boarding training, for example where changes to workshops are significant enough to warrant delivering new Train the Trainer sessions, or where changed transaction flows may have an impact on CTO emulators.

### 8.2 Release 1 Overview

Based on our current knowledge, a total of 60 different BAU pieces of training material have been identified as requiring amendments as a result of the changes caused by Release 1. These files are varied in type and include word documents, excel spreadsheets, eLearning modules and videos. The complexity of change also varies; in some documents, changing a few words will suffice, while others require a whole document to be rewritten. As a result, timescales for making amendments could range from overnight for minor changes and approval, to around 8 weeks. This will depend on the amount which needs changing, the type of document affected and the complexity of signoff required. A full list of these files is available in the Appendix of this document

It has been identified that changes to documents held on the EASE Sharepoint can be amended by the Network support team. Changes to eLearning files will be reviewed by the product owners, before the BTTP team liaises with our external supplier to complete any changes.

BAU classroom learning is facilitated by Field Support Advisors, who have previously been identified as an affected audience, and have a proposed training plan for this Release. It is envisaged that Release 1 will cause no changes significant enough to require re-training of this audience for the specific purpose of delivering classroom learning, and that all required knowledge can be gained from the proposed learning plan. However, the complexity and scale of future releases may potentially significantly affect classroom training material. This may warrant further Train the Trainer workshops for this audience in future releases, in order to prepare them for the changes.

It should also be noted that the number of files impacted by changes are subject to change since the data is drawn from various working Sharepoint sites and web links. These locations are regularly checked, as a minimum once a week, for recent additions, deletions or amendments. A database of known BAU training material is maintained by the BTTP training team and updated as a result of these regular checks.

#### 8.2.1 EASE SharePoint

49 unique BAU files held in 73 different locations on the EASE SharePoint site have been identified as requiring changes due to Release 1. These are made up of word documents, excel spreadsheets, pdf documents and a link to the Post Office Horizon Online Help on the Intranet site.

The majority of these documents are to be reviewed by Sandra McBride, Network Change Support Adviser. In the case of an operation manual or workbook being affected, it would need to be reviewed by the relevant product manager. Where the changes involved are minor, this may only require a number of days to liaise with owners to ensure signoff; however, where significant process changes need to be made, or where issues of compliance are raised it may take a number of weeks to ensure that all parties are satisfied with the changes. The Horizon Online Help link is covered below. In all cases, it is the responsibility of the BTTP Training Team to co-ordinate these updates to ensure that all materials are accurately updated, approved and available in time for rollout.



### 8.2.2 eLearning

11 modules in 17 locations on the Learning and Development eLearning site have been identified as being impacted by Release 1. They contain references to User Management processes and Mails Transaction journey paths. In line with our established ways of working, any changes to existing eLearning content requires an 8 week period to complete and be appropriately reviewed and approved. It is the responsibility of the BTTP Training Team to manage this process and ensure that these timelines are maintained and that all changes are made available ahead of any face to face training.

### 8.2.3 Horizon Online Help

Horizon Online Help is held on the Post Office Intranet site and it is the key location to find branch operational information. It contains 7 links to various aspects of operational information for branches. There is historical information contained in Branch Focus Online, Branch Focus Online Archive and Weekly Activity, however as this is historical information, it is not in scope to be updated. There is a Telephone List which contains useful telephone numbers and will not be impacted by Release 1 or future releases. The remaining 3 links, Stock Codes, Compliance Workbooks and Horizon Help are all impacted by Release 1 and would need major amendments made in each.

The development of Enhanced User Help and Support is included as part of Release 1, and the training team is not responsible for this piece of work, however they will be involved in the Design phase of this work package to ensure that training needs are suitably identified.

### 8.2.4 Compliance Workbooks

Compliance workbooks are accessed in a number of ways – through ORBIT, EMC (for new joiners), and Horizon. 9 workbooks have been identified as being impacted by Release 1. Review and signoff of these would be done by the relevant product owner, with the training team managing this process to ensure that all documents are updated on time.

## 9 Risks

Throughout the gathering of information for previous Training Needs Briefs and in developing this document, a number of risks have been identified by Training Team colleagues and other stakeholders.

Risks	Mitigating Actions	Impact
<p>There is a risk that a lot of branches will be experiencing a lot of change over a short period time because BTTP is a large programme - hardware, network and software are all changing.</p> <p>The consequence is that colleagues will be receiving higher volumes of training at more regular intervals than they are used to, and may not have sufficient time to embed learning</p>	<p>The training solution needs to consider the impact all the changes are having on active users, ensuring the language used and the message is positive and the benefits are being sold. BAU training is not currently set up to support this.</p> <p>The training team will need to work with individual audiences to feed into a suitable engagement strategy (owned by Communications), to ensure that colleagues are supported through continual learning while the BTTP is being implemented.</p> <p>Training needs to align with the overall network plan to ensure there is no conflict or duplication of expectation at branch level.</p>	M
<p>There is a risk that Simpler to Run Network (STRN) will impact the content and timelines for BTTP, including Release 1.</p> <p>The consequence of this is that Release 1 content could potentially change dramatically, be cancelled or be pushed back.</p>	<p>The training team needs to be aligned with STRN to gain an understanding of how STRN outcomes might affect Release 1 content, so that we are aware at the earliest possible time.</p> <p>Training Needs Analysis must be written so that it is adaptable and can be used in whole or in part, depending on the release timetable of individual work packages.</p>	H
<p>There is a risk that End User Computing (EUC Branch) rollout will coincide with the expected rollout of Release 1.</p> <p>The consequence of this is that learners will have to additional training requirements in a condensed amount of time, and that messaging of the two changes could become confusing</p>	<p>The training team needs to remain aligned with the EUC branch of BTTP and ensure that all training and messaging is delivered in a coherent manner.</p> <p>The training team must work with the programme ensure that sufficient time is provided for colleagues to complete both types of training, in the event of a crossover. Final decision for scheduling of implementation dates will rest with the programme.</p>	M
<p>There is a risk that due to Post Office being unable to verify with any degree of certainty how many branch colleagues work in the agency network or who they are, there could be far more learners than has been estimated.</p> <p>The consequence is that we don't have an accurate understanding of how many people we need to train.</p>	<p>The training team needs to ensure the training solution, including any proposed LMS or reporting capability, is robust enough to handle more users than the estimated figures.</p>	M

Risks	Mitigating Actions	Impact
<p>There is a risk posed by the relocation of the NBSC from Dearne to Chesterfield due to the recruitment of new staff in high volumes.</p> <p>The consequence is that nearly half of the NBSC staff will either be undergoing or will have only recently completed new learner training when they are being introduced to the BTTP release changes and this could cause confusion and issues with engagement.</p>	<p>The training team must work closely with the NBSC and identify the new learners as a separate audience; communication with the new learners to prepare them for the changes could alleviate engagement issues.</p> <p>The training team must work with NBSC to ensure that more experienced colleagues continue to be supported to be able to handle incoming queries.</p>	L
<p>There is a risk that Enhanced User Management will be released independently ahead of Release 1.</p> <p>The consequence is that the learning outcomes will have to be delivered early and completely separate from the Release 1 training.</p>	<p>The training team must work closely with BTTP to update and revise timelines for Enhanced User Management deployment.</p> <p>Additionally, the Enhanced User Management learning outcomes must be capable of being developed as standalone training, independent of all other Release 1 training.</p>	H
<p>There is a risk that the accurate tracking and reporting of training uptake will be difficult before the Enhanced User Management system is in place because postmasters are currently responsible for training staff in agency branches.</p> <p>The consequence is that branch colleagues won't be adequately trained in time for the release of the new user management system, and that Post Office will be unable to provide evidence of training being completed.</p>	<p>The training team will need to make sure there is a reporting solution whereby training completion can be accurately measured and recorded.</p>	L
<p>There is a risk that there will be negativity from postmasters who will view the process change in Enhanced User Management as Post Office taking control and removing flexibility from the branch.</p> <p>The consequence is that support service colleagues such as NBSC, counter trainers, branch auditors etc. will need to be able to respond appropriately to the challenge from branch colleagues.</p>	<p>In addition to process and system training, the training team must develop and deliver objection handling material for support service colleagues.</p> <p>This should also be developed as part of the communications strategy to ensure that positive messaging is delivered to the business to mitigate any potential negative reaction.</p>	M

Risks	Mitigating Actions	Impact
<p>There is a risk because at this stage the details of how Computacenter engineers, Northern Ireland branch colleagues and all BFPO user IDs will be processed has not been defined. The consequence is that the learning outcomes defined in this TNA may not be suitable and further training will have to be developed to cover these populations.</p>	<p>The training needs should assume that IT Support engineers, Northern Ireland branch colleagues and BFPO personnel will be treated differently. The training team must work closely with BTTP to update and revise the training needs for IT Support engineers and BFPO and update training needs as the process design is developed.</p> <p>Learning solutions for any additional changes identified, will be delivered using the same methods for other similar audiences, with content specific to this group. This will be finalised in the training strategy, when these changes are confirmed.</p>	M
<p>There is a general risk that a large number of decisions regarding the candidate work packages, proposed changes and deployment strategy are still outstanding.</p> <p>The consequence is that the learning outcomes defined in this TNA may not be suitable and further audiences or learning outcomes will be identified</p>	<p>The training team must work closely with BTTP to identify potential changes which affect the training solution, and update training needs as the process design is developed.</p>	M
<p>There is a risk that the changes resulting from Improved Transaction Journeys could be complex.</p> <p>The consequence is that the estimated times for training development and delivery could be insufficient and impact the implementation of the change.</p>	<p>Training team to work closely with the programme, and be actively involved in workshops throughout the design and build phases so that changes to the estimated training effort can be revised as soon as they are identified</p>	M
<p>There is a risk that with the volume of changes occurring to materials, manuals and training, that BTTP training will be difficult to find on the Help and Support solution</p> <p>The consequence is that colleagues will not be able to access the resources they need to feel comfortable in their roles</p>	<p>The training team will need to feed into the Enhanced User Help and Support design phase, and ensure that all BTTP training materials are appropriately "tagged" or filed so as to be easy to identify and locate</p>	L
<p>There is a risk that with the number of stakeholders throughout BTTP involved in creating their own documents and resources, that there will be inconsistency of messages and terminology</p>	<p>A Terms of Reference (TOR) is required for all BTTP stakeholders, to have agreed to a consistent set of terms and messages, and that these are delivered throughout all streams of the programme.</p>	L



Risks	Mitigating Actions	Impact
The consequence is that colleagues may be confused about terms or expectations that are being used.		

## 10 Path to Training Strategy

In line with One Best Way Delivering Change, a TNA document would typically be provided to the programme as part of the Design phase. As this is the first release of a series of scheduled releases, the decision was made to bring the development of this document forward to the Assess phase, in order to begin to identify bigger picture training needs and relationships across the broader BTTP programme. In addition, a number of challenges specific to Release 1 have been identified in this TNA, which can begin to be addressed prior to the Design phase of the programme.

As a result of this timing, there are still a significant number of uncertainties as to the final structure of Release 1, the detailed content of each work package, and the impact that this will have on training audiences and developing content.

Following from this document, the training team is required to provide the programme with a detailed Strategy and Plan as part of Business Readiness Assurance for the Build phase. This strategy can only be developed in the Build phase, as a full understanding of the proposed curriculum and deployment strategy depends upon knowledge of rollout timeframes, detailed confirmed changes and other information which is not yet available.

Throughout the Design and Build phases of Release 1, the training team will continue to work closely with other areas of the programme to ensure that decisions affecting training are integrated into the strategy as it develops.

### 10.1 High level considerations

Before any detailed work can be started on the Training Strategy, the team will require a confirmed signed off list of work packages to be included in Release 1. This will provide us with confirmation of the overall scope of the training to be delivered, and allow us to clarify training needs for a number of audiences who have been identified in this document as potentially requiring training.

Once we have a better understanding of the scale of the changes for each work package, we will be in a position to identify which particular audiences will require training, and which can be informed to a suitable level to complete their jobs through communications.

### 10.2 Specific considerations

As the Design and Build phases progress, additional information will become available that will inform the Training Strategy document. Once the list of work packages has been confirmed, the training team will need to develop an understanding of the functional changes occurring within each work package, in order to be able to provide a detailed analysis of the exact audiences, learning outcomes, and reporting strategy. Only once there is a full understanding of the complete scale of change and the specific process and behavioural changes that are occurring, will we be able to provide an accurate strategy.

Our understanding of these changes will develop and change throughout the Build phase and there are a number of areas where we have very little information around the detailed changes to be able to start these conversations. However, research for this document has already highlighted a number of specific considerations which we must be aware of when gathering information for the Training Strategy.

#### 10.2.1 NBSC

- Confirmation is required as to whether NBSC or another group will be responsible for unlocking passwords for the new Enhanced User Management system and if this will be all NBSC advisers or only a sub-group.
- NBSC are expected to be the owners of the Enhanced User Help and Support system, but we need to know to what extent they will be responsible for the information and processes and if the POL Management Information team will be the sub-group who carries out the creation and process for this system.

- We will need to identify who will be responsible for carrying out the migration from Knowledge Base to the new Help system, when this is likely to take place, and what the training impact will be on this team.

#### 10.2.2 Other Audiences and considerations

- HRSC - we need to identify who will be responsible for carrying out the migration piece of work from the current user/P250 database to the new Enhanced User Management system, when this is likely to take place, and what the training impact will be on this team.
- We need to determine the role that the Security team and Product Managers will play with respect to Branch Messaging and Enhanced User Help and Support in the new solution so as to determine the relevant training needs.
- For the Sales team, we must determine whether the changes to transaction journeys are complex enough to warrant training or whether Comms will be enough.
- Once the designs for Branch Messaging and Enhanced User Help and Support have been signed off, identify whether or not the changes will affect this Managed Services team and engage with stakeholders to determine learning outcomes.
- Confirm whether Model Office colleagues are included in the design and build phase of Release 1 as this will determine whether or not they need additional training or Comms support. Whatever happens, they will be provided the same training materials a branch would receive.
- Identify whether Fujitsu will be responsible for the creation and maintenance of global user IDs for Post Office colleagues in the new solution for Enhanced User Management. If not, then they will not require any training.
- When supporting external audiences, we must define the responsibility of Post Office regarding developing, providing and/or delivering this training
- Identify the impact of other programmes such as STRN and EUC Branch. This will inform our timelines as well as our choice of LMS
- Learning Technologies Manager should be consulted in preparation for engagement with multiple partners, to ensure that potential issues regarding firewalls and access to LMS are taken into consideration in a timely fashion

## 11 Appendix A – Learning Outcomes

This appendix contains the detailed training content information for each of the identified learning outcomes for the work packages in Release 1 of BTTP. The information for these tables was gathered at the Core Services workshops and from documentation provided by stakeholders, including BRLs and BAs.

Please note that all work packages will include a training outcome outlining the rationale for the change and methods of training evaluation.

Table 1: Enhanced User Management

<b>Learning Outcome</b>	<b>Learners will:</b>
New User ID process & reporting	<ul style="list-style-type: none"> <li>• Understand the new process</li> <li>• Be able to reset their password</li> <li>• Be able to unlock a user ID</li> <li>• Be able to use the new reporting capability, relevant to their role</li> </ul>
Migration process for all existing users	<ul style="list-style-type: none"> <li>• Understand the new process for creating new IDs and passwords</li> </ul>
Submitting P250s electronically (Postmasters only)	<ul style="list-style-type: none"> <li>• Be able to submit a P250 for all new users</li> </ul>
HRSC- user administration	<ul style="list-style-type: none"> <li>• Be able to create a user ID with training access only</li> <li>• Be able to create an initial user password</li> <li>• Be able to process a P250</li> <li>• Be able to assign a role(s) to a user ID</li> <li>• Be able to assign access rights to a user ID</li> <li>• Be able to access reporting on non-conformance on required training</li> <li>• Be able to access reporting identifying completion of Compliance training</li> <li>• Be able to restrict access rights on an existing user ID</li> <li>• Be able to re-activate archived users</li> </ul>
NBSC – user administration	<ul style="list-style-type: none"> <li>• Be able to remotely reset a password</li> <li>• Be able to remotely unlock a user ID</li> </ul>
In branch - user management	<ul style="list-style-type: none"> <li>• Be able to add a user to the branch</li> <li>• Be able to allocate a role to a user ID</li> <li>• Be able to restrict transactions on a user ID</li> </ul>
Security/ Audit investigation - reporting	<ul style="list-style-type: none"> <li>• Be able to access Reports available to support investigations showing user ID against transactions</li> </ul>
Objection handling	<ul style="list-style-type: none"> <li>• Understand and be able to effectively use objection handling principles</li> <li>• Understand and be able to explain the benefits of the new process</li> <li>• Understand and be able to explain what branch colleagues can do for themselves</li> </ul>
Fujitsu: New User ID process & reporting	<ul style="list-style-type: none"> <li>• Understand the new process</li> <li>• Be able to reset their own password</li> <li>• Be able to unlock a user ID</li> <li>• Be able to access appropriate reporting</li> </ul>



Table 2: Enhanced User Help and Support

<b>Learning Outcome</b>	<b>Learners will:</b>
System training and new features	<ul style="list-style-type: none"> <li>• Be able to navigate the new system and features</li> <li>• Be able to use the new functionality</li> </ul>
Reporting	<ul style="list-style-type: none"> <li>• Be able to run the help system reports</li> </ul>
New business process for Help content creation and maintenance	<ul style="list-style-type: none"> <li>• Understand the new business process, roles and responsibilities for non-branch colleagues</li> <li>• Be able to create help content</li> <li>• Be able to review and approve help content</li> </ul>
System training on content formatting, publishing, deleting etc.	<ul style="list-style-type: none"> <li>• Be able to format help content</li> <li>• Be able to publish help content</li> <li>• Be able to maintain help content</li> <li>• Be able to produce system reports on help content usage etc.</li> <li>• Be able to access and report on archive content e.g. what content was live on a particular date</li> </ul>

Table 3: Branch Messaging

<b>Learning Outcome</b>	<b>Learners will:</b>
System training and new features	<ul style="list-style-type: none"> <li>• Be familiar with all new features</li> <li>• Be able to use new functionality</li> </ul>
Reporting	<ul style="list-style-type: none"> <li>• Be able to run reports on messages received and read receipts</li> </ul>
New business process for content creation and sign off	<ul style="list-style-type: none"> <li>• Be familiar with new business processes, roles and responsibilities for non-branch colleagues</li> <li>• Be able to create and release messages</li> <li>• Be able to review and approve messages</li> </ul>
System training on content creation, management, publishing, deleting	<ul style="list-style-type: none"> <li>• Be able to format messages</li> <li>• Be able to publish messages</li> <li>• Be able to maintain messages</li> <li>• Be able to produce system reports on messages read</li> <li>• Be able to access and report on archive content e.g. what messages were issues and when</li> </ul>

Table 4: Improved Transaction Journeys

<b>Learning Outcome</b>	<b>Learners will</b>
New screen layouts, transaction flow and process steps	<ul style="list-style-type: none"> <li>• Be able to successfully use new features and functionality</li> <li>• Be able to successfully navigate new transaction flow</li> </ul>
New sales conversations to fit the new process steps	<ul style="list-style-type: none"> <li>• Be able to conduct successful sales conversations for any product which has changed</li> </ul>
Updates to CTO training	<ul style="list-style-type: none"> <li>• Understand and be able to explain an changes to the BAU training product</li> <li>• Be familiar with and able to explain new features and functionality</li> <li>• Be familiar with new transaction flows</li> <li>• Be able to train new Postmasters on updated sales conversations</li> </ul>

## 12 Appendix B - Lessons Learned

Research was carried out into previous Post Office initiatives that have either been learning based or involved a high degree of learning, in order to understand the lessons learned. The research included interviews with parties involved and analysis of user feedback.

The specific initiatives investigated were:

### 12.1.1 Implementation of Horizon Online (HNGx)

Lessons learned information was gathered from the following sources:

- Interview conducted with Alina Lingard, Post Office Business Change Manager during the roll out
- Interview conducted with 4 Field Support Advisers, Claudette Beaney, Tim Gordon-Pounder, Richard Cross, Carol Williams (facilitated by Sue Richardson)
- Summary of Training Website Usage, including usage data and user feedback

Horizon Online was identified as a key initiative for lessons learned as it was the last major upgrade to the Point of Service (PoS) system, completed in 2010. Although the products and services transacted at a branch did not change, the look and feel of the system changed significantly, with a new screen layout and system functionality. This impacted all branches, including mobile and outreach branches, as well as the Counter Training Office (CTO) branches used for onboarding. It also affected non-branch colleagues across the business such as the Finance Service Centre and the NBSC.

The new system was migrated to branches on a rolling schedule, with in-branch go-live migration support provided by Post Office.

### 12.1.2 Launch of Onboarding Programme as part of a blended solution

Lessons learned information was gathered from the following people:

- Interview conducted with Sue Richardson, Network Operations Project & Standards Manager
- Interview conducted with Jackie Newton, Sales & Customer Services Training Manager

Post Office Learning and Development (L&D) were identified as a key source of lessons learned as they have introduced online learning to the business. Following the 'digital by default' principle, online training for Compliance training was introduced in 2013, which is now used by all Post Office colleagues, and in February 2015 product training for all onboarding was introduced. This has reduced the amount of face to face training required by branch colleagues by over 30%. The training is widely available 24 hours a day, 7 days a week and introduced new colleagues to the concept of accessing learning through their own device.

### Summary of Findings

	What?	Why?	Learnt from...
<b>Learning Material Development</b>	Keep it simple and with clear step by step instructions.	To allow for the very broad user base with differing IT skill set.	Success of the compliance training is seen as down to simple instructions and layout.
	eLearning: Develop for different operating systems / devices / browsers / releases  e.g. iOS / Android / Windows 7 / Windows 10/ Chrome / Firefox / IE. Allow the flexibility	To avoid problems accessing eLearning, and users getting error messages that detract from the learning experience	Online Product Training deployment (lots of IT related help calls before training can be accessed).

	What?	Why?	Learnt from...
	to incorporate new/future releases.  Add an FAQ as part of registration		
	Develop in bite-sized chunks. eLearning should have the ability to pause and resume.	Supports business operations, e.g. able to train and pause while serving customers.	Horizon Next Generation (HNG) User Feedback
	Build understanding around the associated benefits for the system change.	Increases colleague buy-in and training uptake.	Online Product Training
	A mixture of training methods and materials are beneficial to support training.  Help for a user that is at their fingertips and easy to access and reference is very important when serving customers.	Workbooks recognise the need to cater to a diverse range of learning styles, and have been effective for both users without eLearning access, and those uncomfortable with eLearning. Very much part of the culture of training and product updates at the Post Office today so would be expected by end users.	HNG deployment and new product updates are supported by workbooks and mixed training material.
	Training must conform to the Equality Act 2010 and be accessible in all appropriate formats.	So it can be accessed by all users.	All training material confirms to the principles of the Equality Act
	Develop training modules that are specific to each branch-type i.e. content specific to the products and services sold in the different branch types, such as Main and Local.	To ensure colleagues have access to the learning relevant to then to ensure they can continue to do their job	Online Product Training
	Thorough checking and testing of all material is vital before it is released for use.	Avoids the situation where training material does not reflect reality, which in turn can erode colleague trust in the training solution	HNG User Feedback
	Use modern training design techniques,	By using engaging designs we may	Online Product Training



	What?	Why?	Learnt from...
	including images and interactivity, to create engaging content.	increase colleague buy-in and training completion rates.	
<b>Learning Deployment</b>	Consider deploying to Crown branches first.	For quick wins and quick lessons learned.	eLearning
<b>Learning Material Delivery</b>	Training material should be available all the time – whether hard copy, soft copy or eLearning. eLearning should be available not just from office locations / Post Office devices.	Avoid impacting customer service and working hours.  Colleagues can train at their own speed and time on a device that is familiar to them.  Encourages culture change regarding eLearning.	Online Training provided for deployment of HNG.  During the deployment, 6370 out of 11700 branches accessed eLearning, with 15,366 colleagues creating an account. There were also 865 registered back-office users i.e. non branch colleagues.
	Provide training material that can be accessed on slow / limited internet connections. This includes workbook alternative, and the option for low resolution images and videos in eLearning activities	Enables everyone to benefit from eLearning and doesn't leave some colleagues in rural locations feeling frustrated / abandoned.	HNG User Feedback
	Include active user engagement, navigation and FAQs in the material. For eLearning include Show me, Help me, Let me scenarios	To encourage confidence and prove ability.	HNG User Feedback
	Early engagement with Multiple agencies to identify expected training time required, access methods, and agree any firewall changes that might be required to allow colleagues to access Post Office learning through the one store computer.	Develop buy-in with Multiples colleagues to ensure that training is viewed positively. To avoid delays in the training of Multiples agencies colleagues.	Compliance Training
	Training may be available during weekly Worktime Learning (WTL) sessions for Crown and Multiples branches.	Would keep to branches allocated schedule and not disrupt time spent serving customers.	Used for communications, particularly for product changes.



	What?	Why?	Learnt from...
<b>Learning Completion / assessment tracking</b>	Track training at an individual level (colleagues per branch)  -e.g. name/email to create unique log-on  -use personal email addresses if Post Office ones not available	Gain a full picture of skill level per branch and per individual to increase confidence in ability to use the system.  To assure readiness for go-live. Identify potential risk areas in advance and develop mitigation strategies.	Network Transformation tracks individual training completion, including Multiple agencies where end users have provided personal email addresses.
	Training progress monitoring before go live.	Gain a full picture of skill level and business readiness prior to go-live, to avoid heavy demand on go-live support resources.	HNG online deployment

# 13 Appendix C - Business as Usual Materials to be updated

The following materials have been identified as affected by the proposed changes to be delivered in Release 1. The following table outlines each file, along with a description, the current owner of the piece of material, as well as an estimated time to complete updates and approvals, based on the complexity of change required.

Filename	Type	Description	Owner/Author	Complexity	Time (est.)
Appendix E - Transfer Workaid V4.4 Jan 16	docx	Branch transfer guide	Judy Balderson	L	3 wks
Chapter 04 Transfers V4.7 Jan 2016	docm	outline for preparing branch for audit in the event of transfer /conversion	Judy Balderson	L	3 wks
express24 -48 PWW Quick Guide V2.6 June 2015	pdf	Quick guide to PFWW express services	Rita Kendellen	L	3 wks
PO Local Closure Workaid V5.5 Nov 2015	doc	Workaid for Local branch closure activities	Michael Raj Dadra	L	3 wks
Self Serve Kiosk User Guide v3.0	pdf	User Guide for SSK	n/k	H	8 wks
Training Aide for Branch Asset Checking v1.8 Jan 2016 TGP	pdf	Horizon Training Aide for Branch Asset Checking	Tim Gordon-Pounder	H	8 wks
Changing from Shared to Individual Stock Units	pdf	Workaid on how to change from a shared to an individual stock unit on Horizon	Sara M Mitchell	L	3 wks
Outreach Services Hints Tips	pdf	Outreach Equipment Issues Help sheet	n/k	M	5 wks
11,8 Priority Service Despatch V3.0 Sept 14	doc	Horizon instructions for Priority Services despatch	Jayne X Jones	L	3 wks
11,9 ATM Daily Cash Declaration Proforma v2.1 Apr 2011	xls	ATM Daily cash declaration proforma	Sandra Lewis	L	3 wks
14. CaC memoview v3	doc	Transcript of memoview notifying commencement of Case across counter	Sharon Pahal	L	3 wks
81,2 Lottery Handout V4.5 May 16	pdf	Workaid for accounting for National Lottery transactions	n/k	M	5 wks
AEI draft workbook V1.17 23 10 2009	pdf	Workbook for UKBA Biometric Application transaction on AEI	n/k	H	8 wks
Anti Money Laundering and Counter Terrorist Financing - pass by 16 May 2016	Shar epoint	Anti-Money Laundering & Counter Terrorist Financing Horizon Online Help Compliance workbook	n/k	H	8 wks
Anti Money Laundering and Terrorist Financing 2016	pdf	Anti Money Laundering Training Workbook	n/k	H	8 wks
Assessment 2 - Inland Mail 2	video	Assessment Video for Inland Mails Dangerous Goods, Special Delivery & AP Payment Card	n/k	H +	8 wks +
Assessment 3 - Inland Mail 3	video	Assessment Video for Channel Islands Mails, Rejected labels	n/k	H +	8 wks +
Assessment 4 - International Mail 1	video	Assessment Video for International Mails - signed for(Australia)	n/k	H +	8 wks +
Assessment 5 - International Mail 2	video	Assessment Video for International Mails - (Austria)	n/k	H +	8 wks +
BF16 315406_ebay Tracked Returns_Booklet A5	pdf	Colleague user guide for accepting ebay return packages	n/k	H	8 wks
Broadband & Phone	Shar epoint	Broadband & Phone Horizon Online Help Compliance workbook	n/k	H	8 wks
Broadband and Phone Final 2016	pdf	Homephone Broadband Compliance Training workbook	n/k	H	8 wks
Camelot Accounting Guide V3.5 May2016	pdf	Accounting guide for Camelot transactions	Adrian Paling	L	3 wks
Core_Outreach Brief Notes v2.2 Sept 14	pdf	Notes to accompany Core and Outreach Training Presentation	Sandra McBride	L	3 wks
Creating a Shared Stock Unit	pdf	Workaid on how to create a shared stock unit on Horizon	Sara M Mitchell	L	3 wks
Creating an Individual Stock Unit	pdf	Workaid on how to create a individual stock unit on Horizon	Sara M Mitchell	L	3 wks
Dangerous Goods Operational Training	Shar epoint	Dangerous Goods Operational Training Horizon Online Help Compliance workbook	n/k	H	8 wks

Dangerous Goods_Operational 2015	pdf	Operational training workbook for Dangerous Goods	n/k	H	8 wks
Day 3 Part 1 of 3 Training Notes V1.8 apr 16	pdf	Trainers notes to accompany classroom training Day 3 Enhanced Customer Transaction	Sandra McBride	M	5 wks
Financial Services Compliance workbook 2016	pdf	Compliance workbook for Financial Services	n/k	H	8 wks
Financial services products	Sharepoint	Financial Services products Horizon Online Help Compliance workbook	n/k	H	8 wks
HNGX19_LITHO_0108_PFW_3_standard (3)28-07-14 Final.pdf	pdf	PFWW Global Priority Return workaid	n/k	M	5 wks
Horizon On-Line Instructions May 16 v4.1	doc	Instructions on Horizon training solution	Chris Fayers	M	4 wks
Horizon Online Set Up Instructions V2.2 Oct 2013	doc	Instructions on how trainer logs on to Horizon system	Sandra McBride	M	5 wks
Horizon Process V1.1 Sept 15	doc	Horizon Process for Royal Mail Local Collect	Peter B Jackson	L	3 wks
<a href="https://poluk.sharepoint.com/sites/postoffice/Pages/Help-do-your-job.aspx">https://poluk.sharepoint.com/sites/postoffice/Pages/Help-do-your-job.aspx</a>	Sharepoint	Horizon Online Intranet Homepage	n/k	H	n/k
Information Security and Data Protection	Sharepoint	Information Security and Data Protection Horizon Online Help Compliance workbook	n/k	H	8 wks
InfoSec and Data Protection May 2015	pdf	Information Security and Data Protection Compliance Training Workbook	n/k	H	8 wks
Inland Mail Online Learning Module	n/a	Inland Mail Training Module	Pam Flora	H	8 wks
International Mail Online Learning Module	n/a	International Mail Training Module	Pam Flora	H	8 wks
Introduction to Horizon Online Learning Module	n/a	Training module for Horizon Equipment, logon	Pam Flora	H	8 wks
Introduction to PO Local April 2016 V8.1 TGP	docx	Guide for PO Local Model	Rita Kendellen	L	3 wks
Mails Compliance	Sharepoint	Mails Horizon Online Help Compliance workbook	n/k	H	8 wks
Mails Compliance Workbook October 2015	pdf	Compliance workbook for Mails	n/k	H	8 wks
Narrative on Horizon Password resets	n/a	Information on Horizon Password resets	Sandra McBride	L	3 wks
One Stop Paystation 2013 brief1	doc	Paystation User guide for One Stop	One Stop	L	3 wks
Outreach Ops Manual	pdf	Operations Manual to operate Post Office Outreach service	Steve Austin	H	8 wks
Outreach Services Hints Tips	pdf	Outreach Equipment Issues Help sheet	n/k	M	5 wks
Pack A - TRAINER V1.4 Oct 15	pdf	Index for Practicals Pack A with notes, including Mails, Travel Money, Horizon admin processes	Sandra McBride	L	3 wks
Pack X - TRAINER v1.5 Oct 15	pdf	Trainers notes to accompany Learner roleplays	Sandra McBride	L	3 wks
Parcelforce Worldwide Online Learning Module	n/a	Parcelforce Worldwide Training Module	Pam Flora	H	8 wks
Passport C and S Golden Rules FINAL	pdf	Factsheet to help Passport C & S transaction	n/k	M	5 wks
PHU 2.0 User Guide v1	doc	Horizon Installation Guide	n/k	H	6 wks
Pick your Postage Game	n/a	interactive Game to check learning for online postage training	Pam Flora	H	8 wks
PO Local Closure Workaid V5.5 Nov 2015	doc	Workaid for Local branch closure activities	Michael Raj Dadra	L	3 wks
PO Local Compliance 2014-04	pdf	PO Local Compliance Training workbook	n/k	H	8 wks
Practical Learning Classroom Prep Guide V1.7 Jan 16	pdf	Guide to prep classroom for training	Sandra McBride	L	3 wks
Session 26 Local Collect V3 HOL	doc	Dealing with RM Local Collect onsite	Robbie Hemes	L	3 wks
Take the Introduction to Horizon Test	n/a	Test for HOL Module	Pam Flora	H	8 wks
WHS-PO Set Up Best Practice Finalv1	doc	Set up Guide for WH Smith branches	Tim Gordon-Pounder	L	3 wks

## 14 Appendix D - Glossary

Glossary of terms and definitions found throughout this TNA and other BTTP training team documentation

Term	Abbreviation	Which means
Assessment		A list of questions to assess the knowledge acquired as a result of completing training
Balancing		Process by which branches reconcile cash and stock for accounting purposes.
Branch colleagues		Anyone who works in a Post Office branch.
Branch Focus		A weekly publication which is sent to branches. This shows updates to transactions and products/processes as a reference material.
Branch Manager	BM	Person who manages a Post Office branch irrespective of branch type.
Branch Standards		The team that monitor branch compliance against the expected criteria that a branch should meet. It could be transactional, compliance or contractual standards
Branch Technology Transformation Programme	BTTP	Programme of work to upgrade the point of sale technology in Post Office branches which includes hardware, IT network and software.
British Forces Counter Training	BFCT	Used by the British army to train their own personnel to serve in BFPO branches. The branch type BFCT has the same programming as the CTO branch type and is used to provide classroom training.
British Forces Post Office	BFPO	The British army have a number of Post Office branches that use Horizon Online to transact products and services for British Army personnel. The branches are both inside and outside of the UK
Business As Usual	BAU	Part of normal operations once the project is complete
Business Readiness Lead	BRL	Part of the BTTP team and responsible for requirements gathering, stakeholder management and ensuring that the changes can be delivered into the business seamlessly
Colleagues		Includes employees, contractors, consultants, subcontractors, agency workers and business partners
Compliance		This related to the transactions and products that are regulated and failure to deliver the required standard could cause Post Office to be fined and/or customers to be disadvantaged
Counter colleague		Person working in Post Office branch serving customers
Counter Training Office	CTO	This is a branch type that is specifically set up as a training environment. It is part of the live Horizon Online estate but does not connect to third party systems. So for all transactions that rely on an external connection, an emulator is used to mimic the response and allow the transaction to continue. An example of this is the APOP database where Postal Order sales and encashment are recorded
Crown branch	Crown	Branch operated by Post Office using directly employed people.
Customer Experience		The product of an interaction between an organisation and a customer over the duration of their relationship.
Early Life Support	ELS	A 'super user' or 'champion' who is an expert on the new system and processes who will provide support for the first few weeks
eLearning		Delivery of learning, training or education by electronic means involving the use of an electronic device. May involve the use of the internet, intranet, CD ROM or DVD.
End User Computing	EUC	Workstream within the BTTP delivering the hardware and IT network upgrade across the Post Office branch network
Face-to-face		



Term	Abbreviation	Which means
Field based workforce		Post Office colleagues who manage and support branch network e.g. Area Sales Manager
Field Support Adviser	FSA	A field based Post Office colleague who delivers new entrant training, conducts audits and intervention activity within the post office network
Floorwalking		Physical support provided to end users in the branch in the immediate aftermath of the Go-Live
Front Office Application	FOA	IBM supplied software designed to run on all Point of Sale terminals across the Post office Network.
Help		Operational focused online help
Horizon Next Generation X	HNGX	NT based software provided by Fujitsu which is currently operating across the Post Office network.
Learning Management System	LMS	An application for the administration, documentation, tracking, reporting and delivery of electronic educational technology (eLearning) courses or training programs
Local branch	Local	Branch operated under contract to Post Office by a postmaster or Multiple partner which offers a reduced range of Post Office products and services.
Main Branch	Main	Branch operated under contract to Post Office by a postmaster or Multiple partner which offers a full range of Post Office products and services.
Migration Support Manager		Post Office person supporting branches during the cut over from HNGA to the Front Office Application. <i>Please note this title has not been agreed but may be used a working term to distinguish from Post Office trainers.</i>
Module		Training Module is a component of a training Programme e.g. Bill Payment
Multiple branch	Multiple	Branch operated by a company which has a strategic partnership with the Post Office. E.g. One Stop
Network		Relates to the national network of over 11500 Post Office branches
Network Business Support Centre	NBSC	A helpline for Branch Staff if they have a query or need help
Network Transformation	NT	The name given to the project delivering fundamental changes to the Post Office branches between 2012-2018
Non-branch colleague		Anyone who works for Post Office that does not work in a branch. This includes field based roles that support branches
Point of Service Point of Sale	PoS	As the system used in branch does not just sell things, the term used by Post Office is Point of Service, although Point of Sale is also used
Point of Sale terminal	PoS terminal	Computer terminals in branches which enable products and services to be sold to customers.
Postmaster	PM	Person under contract to Post office to operate a branch
Quality Assurance	QA	Process by which designs, processes and procedures are reviewed to ensure they are fit for purpose and in line with requirements.
Subject Matter Expert	SME	A person with expertise that can provide information, guidance and support when assessing the business requirements
Train the Trainer	TtT	Training delivered to Post Office trainers on the training content and how to facilitate the training
Training module		A distinct element of a programme.
Training Needs Brief	TNB	The TNB is a newly created document, designed to provide the programme with an understanding of high level changes, learning outcomes, delivery methods and risks, based on the knowledge available during the Assess phase.
User Experience	UX	The overall experience of a person using a product such as a website or computer application, especially in terms of how easy or pleasing it is to use

Term	Abbreviation	Which means
Workbook		A hard copy training material which enables people to learn by means of text, diagrams, pictures questions and answers etc.

## 15 Appendix E – Training Approach

Learning method	Description
eLearning	<p>eLearning modules will be developed for all of the work packages that impact branch colleagues. This will help with the transition to a digitally enabled learning experience and will be made available to all branch and non-branch colleagues via a LMS, however they will not be the primary method of delivery for this Release.</p> <p>Access for branch colleagues will be via their own device and internet connection. Access for non-branch colleagues will be via Post Office computers and network connections, although they will also be able to use their own devices and internet connections.</p> <p>The support of a strong communications plan will be critical to the success of this learning. The more colleagues who complete eLearning, the richer the experience and more comprehensive the reporting that can be made available.</p>
Workbooks	<p>Learning workbooks designed to adhere to learning principles and engage learners, while detailing system and procedural changes. These should encourage curiosity and help self-directed learning. Operational instructional guides may be required for technical training, and will be developed in conjunction with suppliers.</p> <p>Branches will receive an appropriate number of hardcopy versions, and soft copies will be available as a PDF and HTML document for viewing through Horizon Online. Work will be completed to identify branches and areas where take-up of eLearning will reduce the need for workbooks, so as to reduce costs and align with our strategy of digital by default.</p>
Evaluation	<p>A multiple choice quiz will be provided for each module, to confirm learning. Branch colleagues' confidence and competence after they have completed the workbook or eLearning module. This is approach is based on the Level 2 Kirkpatrick training evaluation methodology</p> <p>We will endeavour to register as many colleagues as possible through the LMS, in line with our digital by default strategy, and to allow them to complete assessment as part of their eLearning.</p> <p>This quiz will also be hosted on the Horizon Online system, for those colleagues completing the workbook option, making the training assessment available to all branch colleagues through the Point of Sale terminal.</p>
Reporting	<p>To monitor branch users that have completed the assessment before the changes are made to the Point of Sale system, a report will be set up to extract data from both the Horizon Online system and LMS and present it back to Post Office in a single form, resembling a dashboard report.</p> <p>This will involve a member of the Training Team developing a thorough understanding of both the LMS reporting and Horizon reporting system, and being able to compare this to current colleague data. As there is currently no way of determining every individual colleague within the network, the Training Team will need to complete an additional piece of work to identify, with as much accuracy as possible, the number of colleagues currently working each branch, and use this to determine the number of colleagues who will require training.</p> <p>Learning</p> <p>In line with formal learning requirements, a pass rate of 100% will be set on all quizzes and assessments. Colleagues will be able to make multiple attempts, where they are unable to successfully pass on their first attempt, however, colleagues who take more than a benchmark (TBC) number of attempts to pass will be flagged.</p>