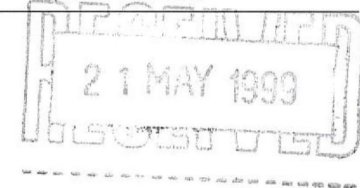# ICL

POST OFFICE

MONTHLY JOINT IMPLEMENTATION REPORT

Ref : JT/IM/M/05
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2 1 MAY 1999

Report Number :   Calendar Month 05

Period :   12/04/99 - 09/05/99

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1. Introduction

This report is produced jointly, between POCL and ICL Pathway and provides a high level quantitative overview of implementation activities, deployed within the Infrastructure and Installation Phases, to facilitate the introduction of the Horizon system into the POCL network.

The figures within this report are based purely on National Rollout and do not include Live Trial Outlets except figures quoted for Checking Rollout Data. Where cumulative figures are quoted these represent activity from the Start of National Rollout.

A Dual Traffic Light Measurement System is encompassed within this report, which is intended to create a high level management summary. These measurements will be categorised into an overall End to End Implementation Programme Rollout status as well as a status for the individual activities within both the infrastructure and installation phases. An additional system will operate in order to provide Trend Analysis. See Appendix A for Success Criteria measurements for individual activities.

2. Report Format

SOURCES OF INFORMATION

- Weekly Joint Implementation Report
- Implementation Programme Feedback
- Benefits Agency Perspective
- Implementation Risks

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ABBREVIATIONS

ACK1	- Code for inclusion of outlet post Readiness Review	NTEA	- North Thames & East Anglia Region
ACK2	- Code for non inclusion of outlet post Readiness Review	NWNW	- North Wales & North West Region
ACK3	- Code for inclusion of an office previously given an ACK2 code	OOH	- Out Of Hours
HIM	- Horizon Implementation Manager	PLM	- Pathway Liaison Manager
ICLP	- ICL Pathway	PO	- Post Office
IP	- Implementation Programme	POCL	- Post Office Counters
IP1	- Scotland and Northern Ireland	Prep	- Preparation
IP2	- North Wales & North West / North East	RFI	- Ready For Install
IP3	- South Wales & South West / Midlands	RGM	- Regional General Manager
IP4	- North Thames & East Anglia / South East	RLM	- Regional Liaison Manager
IPM	- Implementation Programme Manager	RNM	- Retail Network Manager
IPUM	- Implementation Programme User Manager	RODB	- Rollout Database
ISD	- Implementation Support Data	RPM	- WTplc Regional Programme Manager
ISDN	- Integrated System Digital Network	RS	- Re-Survey
ISIS	- Improving Security In Sub Post Offices	S&NI	- Scotland & Northern Ireland Region
MIB	- Management Infrastructure Briefing	SE	- South East Region
Mid	- Midlands Region	SS	- Site Survey
Midas	- POCL South West Region Database	SWSW	- South Wales & South West Region
Mod	- Modification	WT	- (WTplc) Workplace Technologies plc
MTC	- Minimum Training Compliance		
N/A	- Not available		
NE	- North East Region		
NFC	- No Fixed Counter		
NNDB	- National Network Database		
NS	- No Solution		

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3. Headlines and Traffic Light Measurement Systems

Volumetrics for Period - **12/04/99 - 09/05/99**   * Where N/A is shown explanation is given on relevant activity page

ACTIVITY	PERIOD		CUMULATIVE	
	Returned by POCL	Given Go Ahead	Returned by POCL	Given Go Ahead
Checking Rollout Data	1618	1326	16419	14669
	Planned	**Actual**	**Planned**	**Actual**
RGM Letters Despatched	1255	1185	13344	12846
MIB Events Held	N/A*	32	N/A*	256
Site Surveys Completed	1177	1177	10059	9882
Re-Surveys Completed	537	475	3570	3341
Modifications Completed	433	410	1937	1792
Preparations Completed	971	801	5099	3773
Outlets Ready for Install	N/A*	801	N/A*	3773
ISDN Installations Confirmed	0	0	0	0
User Awareness Events Held	0	0	0	0
Training Invitations Issued	0	0	0	0
ISDN Installations Completed	0	0	0	0
Training Events Held	0	0	0	0
Number of Users Trained	0	0	0	0
Installations Completed	0	0	0	0
Migrations Completed	0	0	0	0
Acceptances Completed	0	0	0	0
Number of Live Counter Positions	0	0	0	0

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Infrastructure Activities

Checking Rollout Data	RGM Letters	MIB's	Site Survey	Site Re-Survey	Outlet Mod.	Outlet Prep.
○	● (pink)	○	○	○	○	● (pink)
● (yellow)	○	○	● (yellow)	● (yellow)	○	○
○	○	● (blue)	○	○	● (blue)	○

Installation Activities   *Where no status is shown explanation is given on relevant activity page

User Awareness Events	ISDN Installation	User Training	Specialist Training	Outlet Installations	Outlet Migration	Outlet Go Live Support
○	○	○	○	○	○	○
○	○	○	○	○	○	○
○	○	○	○	○	○	○

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E2E Traffic Light Status - Infrastructure Phase

Event	Critical Success Factor	Impact	Weighting	May Result	Resulting %
Readiness Review	• % of ACK1 outlets	High	15%	82%	12.3%
RGM Letters	• % despatched against planned	Low	4%	94%	3.8%
MIB's	• % of outlets attended compared to outlets invited	Med	7%	92%	6.4%
Site Survey	• % of surveys carried out against baselined	Med	7%	100%	7%
	• % outlets not requiring re-surveys	High	15%	60%	9%
Re-Survey	• % Re-surveys carried out against planned	Med	7%	88%	6.2%
	• % outlets not shown as No Solution	High	15%	(Av 90%)	13.5%
Modification	• % complete against planned	High	15%	95%	14.3%
Preparation	• % complete against planned	High	15%	82%	12.3%
			Total 100%		Total 84.8%

E2E measurement system :

● Red = 0 - 80

○ Amber = 80 - 90

● Green = 90 - 100

E2E Status this period :
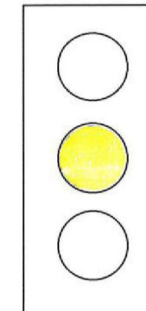
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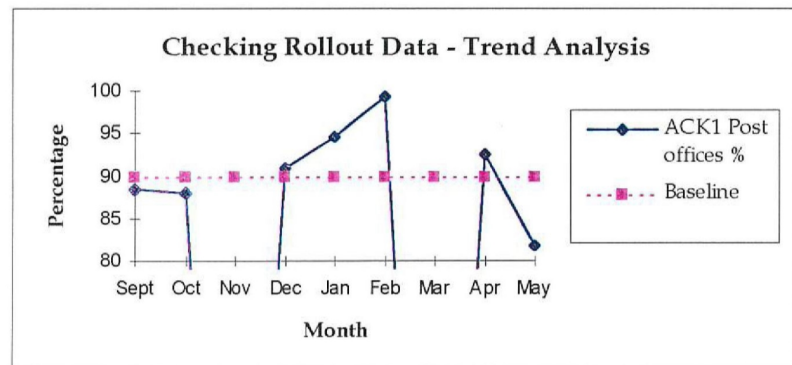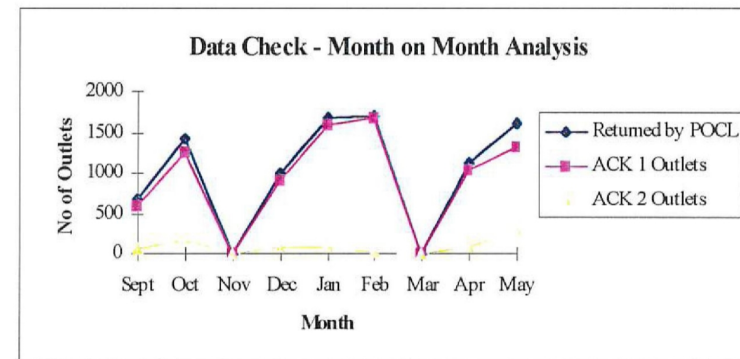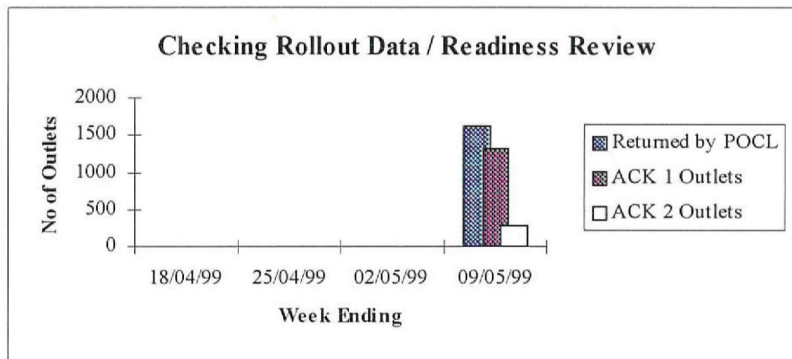
4. Infrastructure Phase

Monthly Snapshot Status : A 🟡

Trend Analysis Status : R 🔴

4.1 (0) Checking Rollout Data / Readiness Review

A monthly check of selected offices to ascertain their readiness for inclusion in the Horizon Programme.

Checking Rollout Data / Readiness Review

Data Check - Month on Month Analysis

Checking Rollout Data - Trend Analysis

The data shown for this period consists of results from Readiness Review 11. A total of 1618 offices were returned by POCL from this review and from these 1326 offices were forwarded into the programme - 82% (ACK1) and 289 offices were withheld from the programme (ACK2). A cumulative total of 352 offices that were previously suspended from the programme have now rejoined (ACK3). As a result of this the monthly snapshot status is amber and the trend analysis is shown as red.

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4.2 (1) Regional General Manager Letters Despatched

Monthly Snapshot Status :   R

Trend Analysis Status :   R

Letters sent to outlets by POCL Regional General Managers informing them of their inclusion in the Horizon Programme

Regional General Manager Letters

(Bar chart. Y-axis: No of Outlets, 240 to 340. X-axis: Week Ending — 18/04/99, 25/04/99, 02/05/99, 09/05/99. Legend: RGM Letters Planned, RGM Letters Despatched)

RGM Letters - Month on Month Analysis

(Line chart. Y-axis: No of Outlets, 0 to 1500. X-axis: Month — Sept, Oct, Nov, Dec, Jan, Feb, Mar, Apr, May. Legend: RGM Letters Planned, RGM Letters Despatched)

RGM Letters - Trend Analysis

(Line chart. Y-axis: Percentage, 90 to 100. X-axis: Month — Sept, Oct, Nov, Dec, Jan, Feb, Mar, Apr, May. Legend: RGM Letters Despatched %, Baseline)

During this reporting period a total of 1185 letters were despatched compared to the 1255 planned. This represents a performance level of 94%. The baseline performance target has been set at 99% hence the monthly snapshot status is red. The trend analysis status is shown as red as the baselined performance target has yet to be achieved.

ICL **POST OFFICE** # MONTHLY JOINT IMPLEMENTATION REPORT
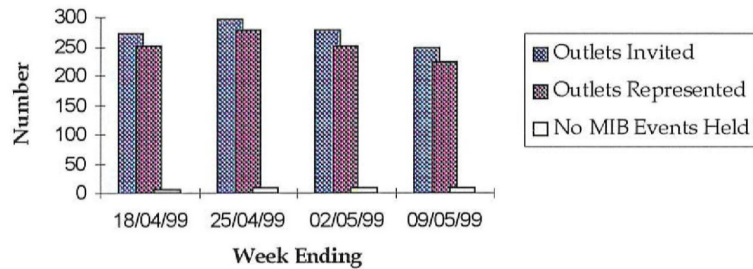
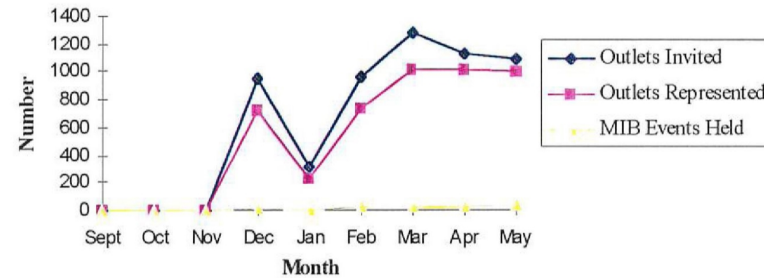Monthly Snapshot Status :   Trend Analysis Status :

4.3 (2) Management Infrastructure Briefing

G ●   G ●

An event where Subpostmasters and Branch Managers are informed about the Infrastructure and Installation Programmes.
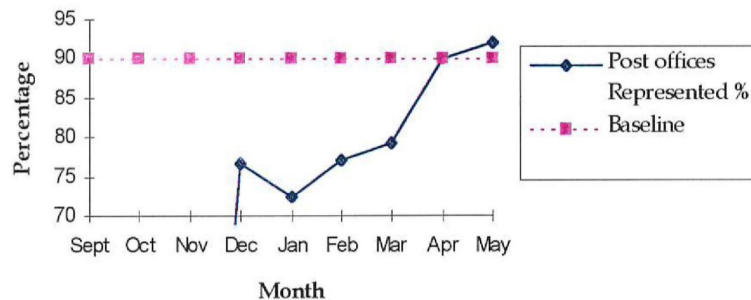

MIB Events & Attendance

MIB Events - Month on Month Analysis

MIB Events - Trend Analysis

A total of 32 MIB Events took place this period. Out of the 1095 offices that were invited to these events, 1009 offices were represented. This represents as attendance level of 92%. This is the second consecutive month since the data has become available that representation has reached the baseline performance target of 90%, hence both the monthly snapshot and trend analysis statuses are shown as green.

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Monthly Snapshot Status :	Trend Analysis Status :
A ● (yellow)	R ● (red)

4.4 (3) Site Surveys

Survey of outlets to ascertain what work is required to become Horizon Infrastructure Compliant.

Site Surveys

No of Outlets vs Week Ending (18/04/99, 25/04/99, 02/05/99, 09/05/99)
- Site Surveys Baselined
- Site Surveys Performed
- Gone to Re-Survey

Site Surveys - Month on Month Analysis

No of Outlets vs Month (Sept – May)
- Site Surveys Baselined
- Site Surveys Performed
- Gone to Re-Survey

Site Surveys - Trend Analysis

Percentage vs Month (Sept – May)
- Post Offices not requiring Re-Surveys %
- Baseline

A total of 1177 surveys took place this reporting period which is 100% of the baselined surveys. The percentage of offices not requiring re-surveys was 60% against the baseline performance target of 65%, hence the monthly snapshot status is shown as amber. The trend analysis status is shown as red due to the fact that since December activity has consistently failed to achieve the baseline target.

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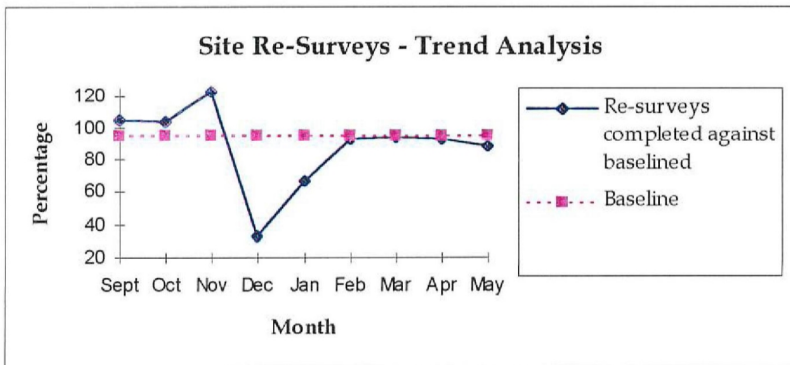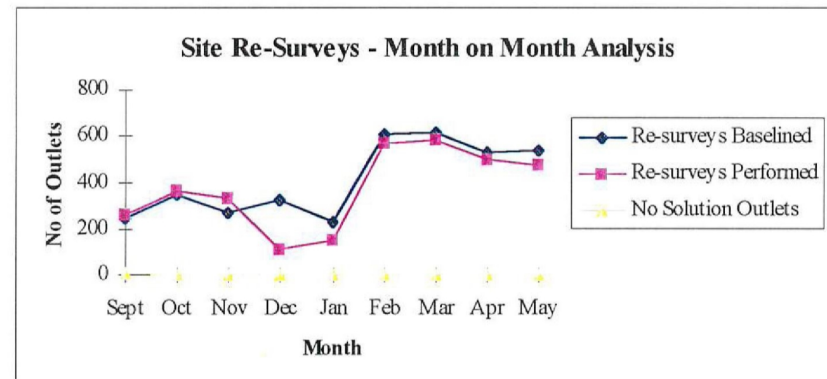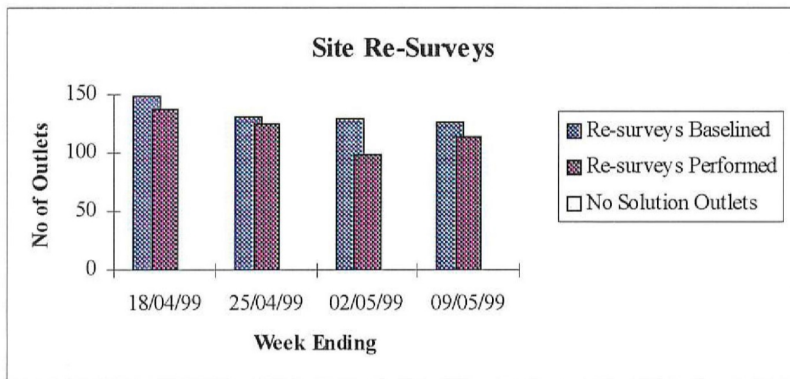
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Monthly Snapshot Status :   A ◯

Trend Analysis Status :   R ●

4.5 (4) Site Re-Survey

Re-Survey to find an acceptable solution for installation of Horizon at outlets where no solution was found at initial survey.

Site Re-Surveys

Site Re-Surveys - Month on Month Analysis

Site Re-Surveys - Trend Analysis

During this reporting period a total of 475 re-surveys were performed compared to the 537 that were baselined. This represents a performance level of 88%. The baseline performance target for this activity has been set at 95%, hence the monthly snapshot status is shown as amber. The trend analysis status is shown as red for this activity as performance has been below the baseline target since December. Data is not currently available for No Solution offices from ICL Pathway.

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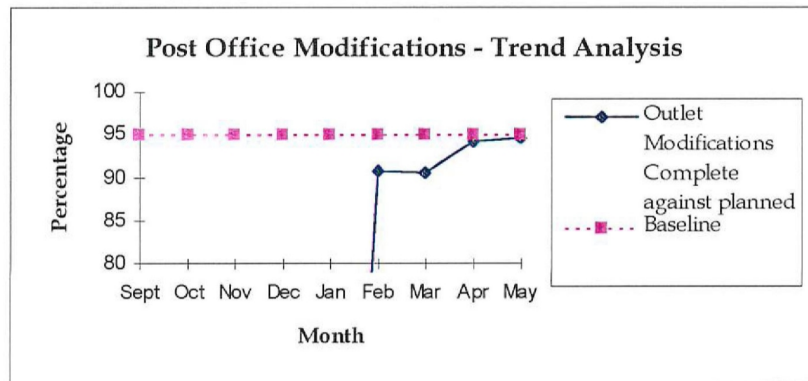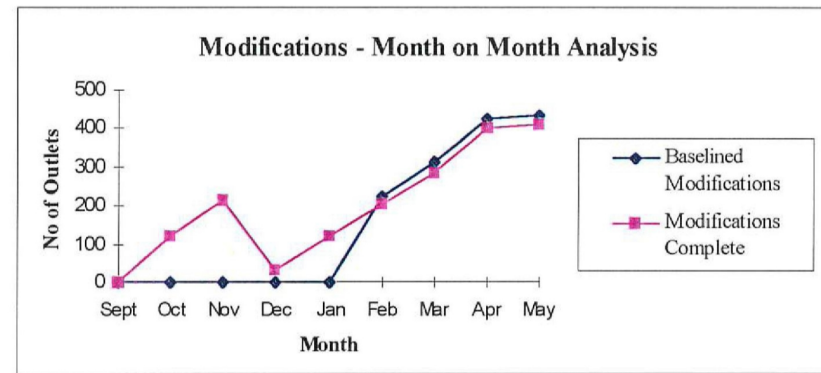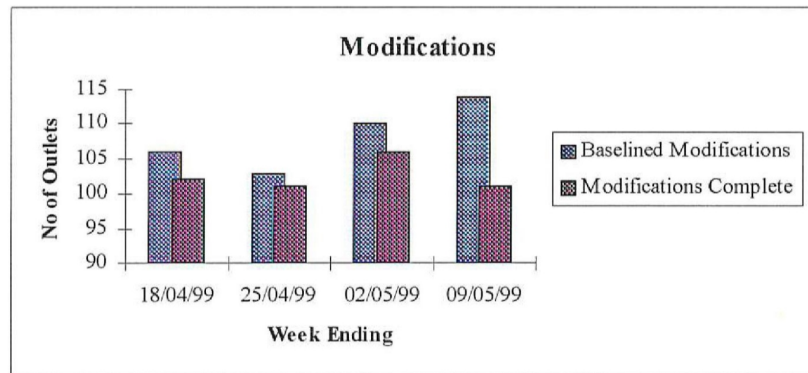Vers : 1.0
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4.6 (5) Modifications

Monthly Snapshot Status : G ⬤

Trend Analysis Status : G ⬤

Modifications to outlets that are required to accommodate the installation of Horizon

Chart: Modifications — No of Outlets by Week Ending (18/04/99, 25/04/99, 02/05/99, 09/05/99); Baselined Modifications, Modifications Complete

Chart: Modifications - Month on Month Analysis — No of Outlets by Month (Sept–May); Baselined Modifications, Modifications Complete

Chart: Post Office Modifications - Trend Analysis — Percentage by Month (Sept–May); Outlet Modifications Complete against planned, Baseline

During this reporting period a total of 410 modifications were completed compared to the 433 that were baselined. This represents a performance level of 95%. The baseline performance target for this activity is also 95% hence the monthly snapshot status and the trend analysis status are shown as green.

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Monthly Snapshot Status :

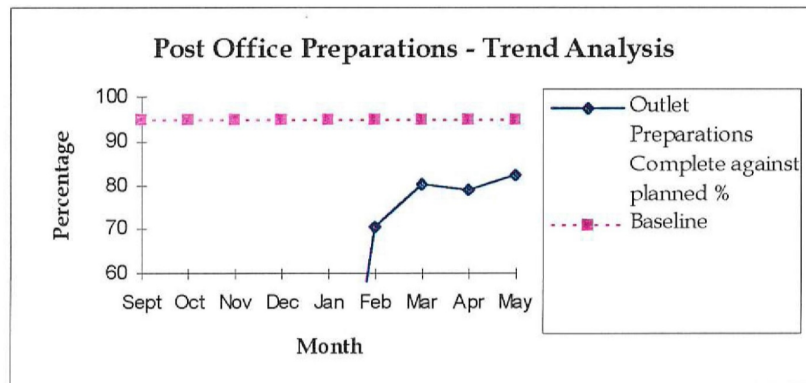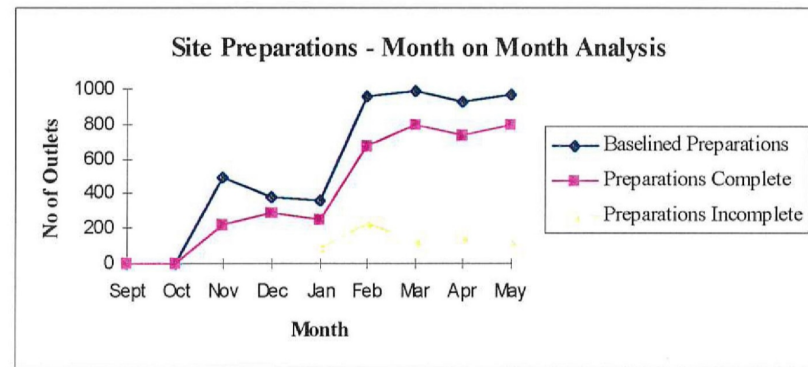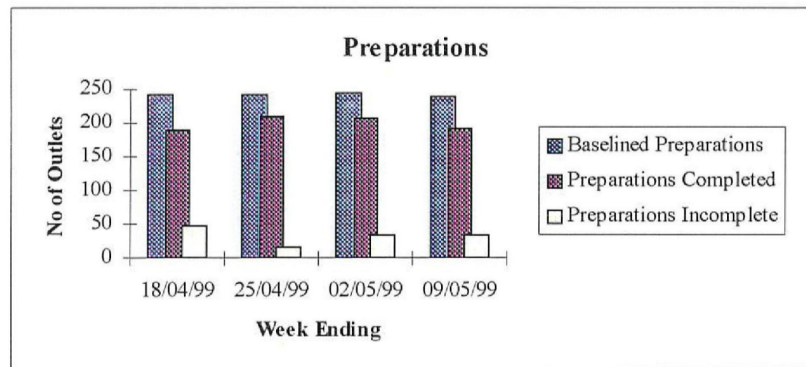R ⬤

Trend Analysis Status :

R ⬤

4.7 (6) Preparations

Preparations to outlets that are required to accommodate the installation of Horizon

Preparations — bar chart, No of Outlets (0–250) by Week Ending (18/04/99, 25/04/99, 02/05/99, 09/05/99). Legend: Baselined Preparations, Preparations Completed, Preparations Incomplete.

Site Preparations - Month on Month Analysis — line chart, No of Outlets (0–1000) by Month (Sept–May). Legend: Baselined Preparations, Preparations Complete, Preparations Incomplete.

Post Office Preparations - Trend Analysis — line chart, Percentage (60–100) by Month (Sept–May). Legend: Outlet Preparations Complete against planned %, Baseline.

A total of 801 preparations have been completed during this reporting period compared to the 971 that were baselined. This represents a performance level of 82%. For the period a total of 132 preparations have been reported as incomplete which represents 13.6% of the baselined preparations for the period. The performance target for this activity is 95% hence the monthly snapshot status is shown as red. The trend analysis status is also shown as red as the level of activity within the current reporting period was 13% below the baseline target and this target has yet to be met.
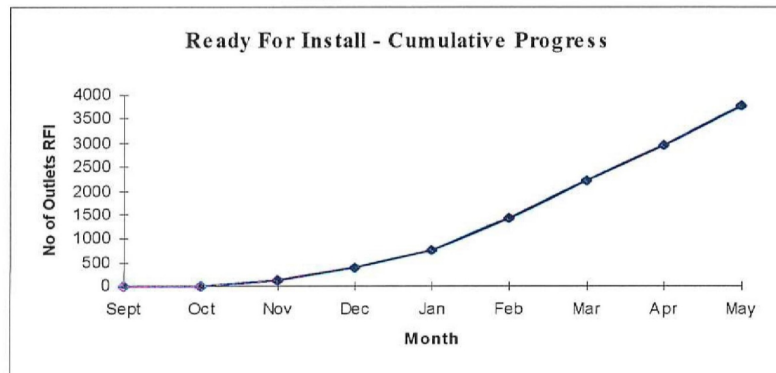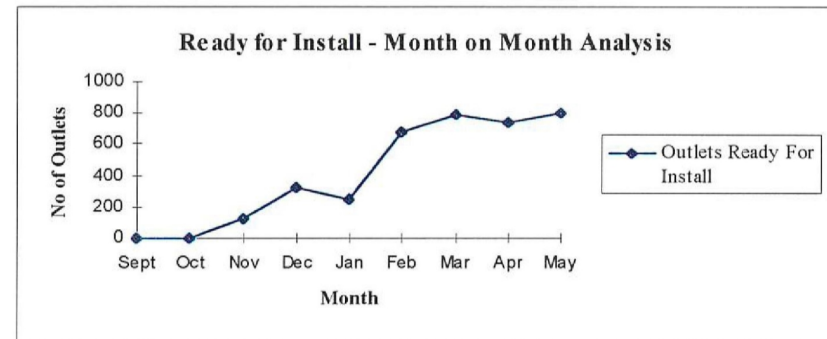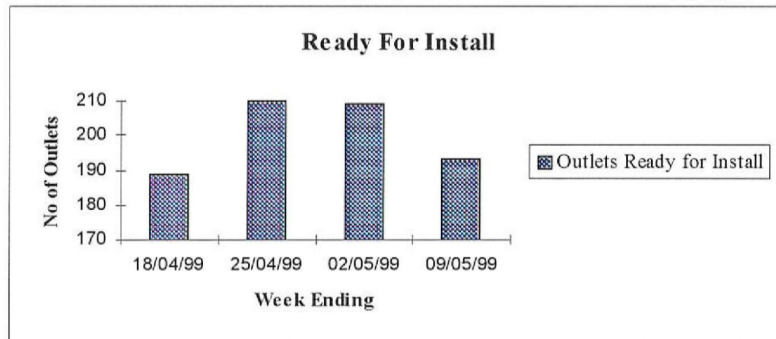
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4.8 (7) Ready for Install

Outlets that are ready to enter the installation phase of Horizon

Ready For Install

Ready for Install - Month on Month Analysis

Ready For Install - Cumulative Progress

A total of 801 offices reached the Ready for Install (RFI) status during this reporting period compared to 737 last month. This brings the cumulative total of Ready for Install offices to 3773.

5. Installation Phase

To date, no activity has taken place within this area.

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6. Implementation Programme Feedback

IP1 - Scotland & Northern Ireland

		Key Area
Issues & Concerns	• Scheduling of offices which require an Isolator fitted by Scottish Power as part of the Prep activity. Discussions ongoing with Scottish Power to ensure Power Down and office closure procedures are followed.	Programme Scheduling
	• Problems experienced with MIBs in rural areas of IP1. This is being reviewed to ensure agreements regarding travel distances and locations are being met.	Training
	• Availability of Mod, Prep "Snagging" and Incompletes schedule to be resolved.	Programme Scheduling
Regional Processes	• Concern regarding number of offices suspended from Programme.	Programme Scheduling
Capture of Best Practice	• Update to Activity Tracking database reflecting the Infrastructure Program tasks split into Daily Process. This has been cascaded to all IPs. Feedback requested by the end of May. This is used for the joint IPE/SSTL/RSM meeting.	IP Operations
Trends	• Availability of Schedules for Survey, Resurvey, Mods and Prep activity now within agreed timescales, but these timescales are often too close to the related activity. Review required to establish any possible increase on schedule availability dates.	Programme Scheduling
	• Cost Suspensions - 70% of IP1 offices suspended for Mod costs will pass revised cost limits.	Modification
Solutions To Problems	• No Comment	

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IP2 - North Wales & North West / North East

		Key Area
Issues & Concerns	• The weekly balancing of post offices operating Live Trial NR2 systems has caused a high level of problems, with subpostmasters experiencing difficulty in achieving their balance. This has been coupled with confusion and difficulty in reaching the appropriate support desks.	Live Trial Balancing
Regional Processes	• No Comment	
Capture of Best Practices	• Regional Pathway database has been developed to incorporate more systematic techniques for validating scheduling.	Scheduling
Trends	• The level of subpostmasters not agreeing to the solution at resurvey has risen recently. • There has been a high level of suspensions due to the release of offices that will be entering the ISIS programme	Re-survey Suspends
Solutions to Problems	• Additional support from both POCL & ICL Pathway has been utilised in supporting NR2 post office balancing, both centrally and in specific outlets. This has helped resolve and reduce the number of issues, however, the underlying causes must still be addressed as the volume of problems cannot be sustained. • The resurvey expenditure levels have now been raised which has reduced the number of offices that are having their modifications suspended due to cost. The offices that have previously been suspended, but are now within the new levels will be re-introduced into the programme.	Live Trial Balancing Modifications

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IP3 - South Wales & South West / Midlands

		Key Area
Issues & Concerns	• Operational problems with upgraded live trial sites is causing resource to be diverted from the implementation team to help contain these issues. • The major operational difficulties that have been experienced relate to the office balance.	Issue Management Issue Management
Regional Processes	• The mechanism for reporting closure clashes on modifications is being revisited to seek more efficient communication channels. • The number of activities aborted due to unforeseen non-fixed counter, refurbishment, resignations has increased significantly since the last period.	Modification Aborted activities
Capture of Best Practice	• PLMs are now targeting snagging issues that are under dispute to endeavour to bring them to a speedier resolution.	Snagging
Trends	• The number of training related issues for the 103 live trial offices has reduced significantly from that experienced with the 204.	Training
Solutions To Problems	• The period of time between the infrastructure programme & the installation programme has increased so that the programme is now well in excess of the original 39 week expectation. It may be appropriate to adjust the communications with outlets to reflect this &, hence, avoid later issues.	Communication

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IP4 - South East / North Thames & East Anglia

		Key Area
Issues & Concerns	• The first batch of Main Offices has been surveyed in London. This has raised a number of concerns, which are being investigated: a) what is the impact on resources required supporting these offices throughout Implementation. b) these are the first ALPS offices which has raised a communication issue around power down.	Site Surveys
	• Some of the larger offices will now require out of hours working to complete the preparation work. This issue will be ongoing throughout the Infrastructure phase.	Preparations
	• The capping on modification costs has been resolved. The process for rescheduling the suspended offices back into the programme is now being planned.	Modifications
Review of Regional Processes	• No Comment	
Capture of Best Practice	• No Comment	
Trends	• No Comment	
Solutions To Problems	• The issue around ACK 2 offices being scheduled into the programme has been found to be a one off problem with the format of files loaded into the rollout database. This problem has now been resolved.	Programme Scheduling
	• The backlog of Won't Do offices has been cleared and a formal process is now in place to track and manage these offices.	Issue Management

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7. Benefits Agency Perspective

Activities Completed/Commenced

- **District Enablement Schedule**

  Version 11 of the Pathway Post Office Installation Schedules have been received and accepted as 'Baselined'. The data is currently being used to inform the details of the District Enablement Schedule for National Rollout. A meeting has been arranged (28th May 1999) to discuss the impact the changes have on the Pilot Districts.

- **Detailed Planning For Post Office Rollout**

  The Field Planning Framework and Planning Guidance to support the National Rollout of Post Offices for payment of Child Benefit (ChB) by Card is continuing to be developed by the CAPS Product Development Team.

- **POCL Live Trial**

  Data Collection Procedures have been developed by the CAPS Implementation Pilots and Operability Team. The data collection process has commenced and information is being collated and will be used to evaluate the operational impact in the POCL Live Trial Districts and centrally based ChB Card Support Unit.

8. Implementation Risks

The Risk Register is delayed this month at the request of ICL Pathway. The register is being reviewed in light of the reorganisations of the Implementation teams both within Horizon and ICL Pathway.

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Success Criteria Measurements - Infrastructure Phase

Appendix A

EVENT	JOINT OWNER	IMPACT	GREEN LIGHT	AMBER LIGHT	RED LIGHT
Checking Rollout Data / Readiness Review • % of outlets ACK1	M.O'Toole POCL S.Burgess ICLP	High	90% or Above	Between 80 & 90%	Below 80%
RGM Letters • % despatched against planned	M.O'Toole POCL S.Burgess ICLP	Low	99% or Above	Between 95 & 99%	Below 95%
MIB's • % of outlets attended compared to outlets invited	T.Rollason POCL S.Lovegrove ICLP	Med	90% or Above	Between 80 & 90%	Below 80%
Site Survey • % of surveys carried out against those planned	A.Jones POCL B.Herd ICLP	Med	95% or Above	Between 85 & 95%	Below 85%
• % of outlets not requiring re-surveys		High	65% or Above	Between 55 & 65%	Below 55%
Re-Survey • % of Re-surveys carried out against those planned	A.Jones POCL B.Herd ICLP	Med	95% or Above	Between 85 & 95%	Below 85%
• % of outlets not shown as no solution		High	95% or Above	Between 85 & 95%	Below 85%
Outlet Modifications • % complete against planned	A.Jones POCL B.Herd ICLP	High	95% or Above	Between 90 & 95%	Below 90%
Outlet Preparations • % Complete against planned	A.Jones POCL B.Herd ICLP	High	95% or Above	Between 90 & 95%	Below 90%

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Success Criteria Measurements - Installation Phase

EVENT	JOINT OWNER	IMPACT	GREEN LIGHT	AMBER LIGHT	RED LIGHT
User Awareness Event • % of events held against those planned • % attended compared to those invited	T.Rollason POCL S.Lovegrove ICLP	Med High	90% or Above 95% or Above	Between 80 & 90% Between 90 & 95%	Below 80% Below 90%
ISDN Installed • % completed against planned	A.Jones POCL B.McDermott ICLP	High	95% or Above	Between 85 & 95%	Below 85%
User Training • % of events held against those planned • % attended compared to those invited	T.Rollason POCL S.Lovegrove P/Way	High High	96% or Above 96 % or Above	Between 94 & 96% Between 94 & 96%	Below 94% Below 94%
Specialist Training • % of events held against those planned • % attended compared with those invited	T.Rollason POCL S.Lovegrove P/Way	Med High	90% or Above 95% or Above	Between 80 & 90% Between 90 & 95%	Below 80% Below 90%
Outlet Installation • % completed against planned	S.Grayston POCL B.McDermott ICLP	High	99% or Above	Between 94 & 99%	Below 94%
Outlet Migration • % completed against planned	S.Grayston POCL E.Long ICLP	High	99% or Above	Between 94 & 99%	Below 94%