

Angela Van-Den-Bogerd

From: Simon Drinkwater
Sent: 12 January 2015 09:32
To: Sue Richardson; Sandra McBride; Jackie Newton; Angela Van-Den-Bogerd; Craig Tuthill; Anne Allaker; sarah.malone; Drew McBride; Kendra Dickinson; Amanda K Stevens
Cc: Natalie Liff; Chris J Gilding; Tim Gordon-Pounder
Subject: Your Input Is Needed; Final Draft - Balancing Guide
Attachments: Quick Guide to Balancing V1.0 Draft.doc

Hi everyone,

Natalie Liff, FSA, has worked on producing a quick guide to balancing for Postmasters who have a loss or gain, (see attached). This has been produced because there doesn't seem to be a clear process to follow in the event of a misbalance. Our Field Team and Branch Support tend to use their own experience to help a Postmaster find a cash or stock discrepancy.

The brief given to Natalie was to make it as easy to use as possible. What we would like to do now is to produce a 'how to' video with Amanda's team where we can refer to this document. Before we go any further, please would you all have a look and let us know;

- If you think there is a need for this?
- If you think the content is accurate?
- If you think there is something that we should add, (please be mindful that we would like to keep it on two sides of A4)?
- If you think it is clear and easy to follow?

Please let me have your comments by 16th Jan.

Regards
Simon

Simon Drinkwater | Business Transformation

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From: Natalie Liff
Sent: 08 January 2015 14:23
To: Simon Drinkwater
Cc: Chris J Gilding; Tim Gordon-Pounder
Subject: Final Draft - Balancing Guide

Hi Simon,

A Quick Guide to Balancing - Reconciling your Cash and Stock with Horizon

Complete “End of Day” activities

- *Back Office [F14], Reports [F1], Counter Daily [21]*
- *Back Office [F14], Reports [F1], Cheques [42] (if applicable)*
- If you require more detail, refer to hand out 11/4 Daily Despatch, which can be found on subspaceonline.

Count your stock items and check your totals against the balance snapshot.

- *Back Office [F14], Stock Balancing [F3], Balance Snapshot [41]*

To reconcile:

- If any of the stock items are showing **LESS** on the snapshot compared with what you have physically counted on the counter, **REVERSE** the difference. *Back Office [F14], Reversals New [21]*
- If any of the stock items are showing **MORE** on the snapshot compared with what you have physically counted on the counter, **SELL** the difference. *Serve Customer [F14], sell by product and settle transaction to cash.*

Declare your postage stamps (1p to £5) and compare the figure with balance snapshot

- *Back Office [F14], Stock Balancing [F3], Declare Stamps [22]*
- If the declaration shows a discrepancy, physically recount all postage stamps.
- The amount of stamps declared will automatically replace the Horizon system figure when the balance report has been completed for that stock unit.

Declare foreign currency

- *Back Office [F14], Stock Balancing [F3], Declare Currency [24].*

Declare cash and check variance

- *Back Office [F14], Stock Balancing [F3], Declare Cash [21]*
- If there's a discrepancy, please read “Troubleshooting” on page 2 before continuing with the balance.

Preview balance report, check figures and rollover the system

- *Back Office [F14], Stock Balancing [F3], Balance Report [42]*
- The Balance Period (BP) is usually weekly (however, a BP can take place as often as a Postmaster wants to complete one.)
- The Trading Period (TP) must be completed monthly, following the calendar for your trading group (branches are assigned a trading group from A to D and a TP is completed every 4 to 5 weeks – there are 12 TPs per year.)
- If you are unsure when your TP is due, check “Branch TP Number”. *Back Office [F14], Branch TP Number [41]*

When you have rolled your office into a new TP:

- Sign **Trading Statement**. *Back Office [F14], Office Balancing [F4]*
- Print **Suspense Account**. *Back Office [F14], Reports [F1], Office Weekly [F3]*
- Print **Postage Label Report**. *Back Office [F14], Reports [F1], Office Weekly [F3]*

If you require more detail on how to balance, please refer to handout 11/5 Branch Trading, which can be found on subspaceonline.

This is the final draft – just need to know where on subspaceonline the handouts will be for the postmaster's to find.

Tim has kindly tidied up the presentation for me via Lync as I missed a couple of things.

Once you're ok with it Simon, I'll save to PDF as V1.0.

Thanks, Nat

Natalie Liff | Field Support Advisor

Post Office Ltd, 4th Floor, 120 Bark Street, Bolton, BL1 2AX

GRO

natalie.liff

GRO





Agenda

Date:	Monday January 12 th 2015
Location:	Room 111 148 Old Street London EC1V 9HQ
Attendees	Sandra McBride Sue Richardson Simon Drinkwater Blossom Dolan Natalie Liff Nick Simmonds Jackie Newton
Guests	Angela Van Den Bogerd
Apologies	N/A

Item:	Lead	Timing:
Scene setting and overview of the day	Jackie / All	10.30 – 10.45
• Day 2 Walk through & Key document sign off	All	10.45 – 12.00
• Day 1 Walk through & key document sign off	All	12.00. – 13.15
LUNCH	Not provided	13.15- 13.45
• Day 3 Draft outline plan including pre day content learning plan	All	13.45 – 14.15
• Classroom content plan Day 3	All	14.15 – 14.45
• Train the trainer draft requirement plan	All	14.45 15.00
• Classroom follow up documentation plan	All	15.00- 15.15
AOB- Review and Close	All	15.15- 15.30

*Please note any items not fully completed will have to be picked up via conference call this week to ensure the go live deadline remains on track.



www.postoffice.co.uk



Event: SLT teamtalk
Dates: Tuesday 13 January
Venue: Royal Statistical Society
Address: 12 Errol Street, London, EC1Y 8LX (entrance on Lamb's Buildings)
Meeting room: Lecture Theatre

Arrival: 13.45
Meeting start: 14.00 prompt
Meeting end: 16.00

Please note there will be no tea and coffee served before or during the meeting.
 Water will be available in the room.

Dress code: Business

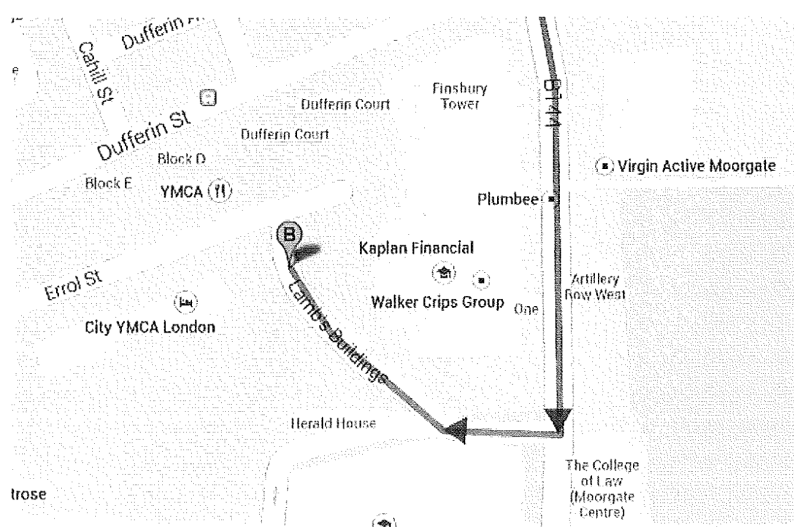
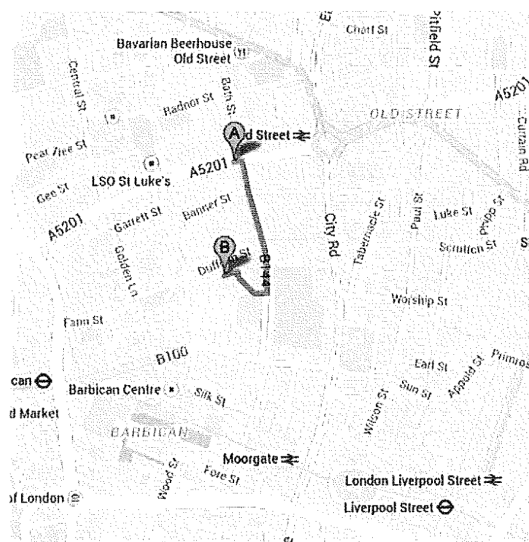
Nearest tubes: Moorgate, Old Street, Liverpool Street and Barbican

Maps:

A: 148 Old St, EC1V 9HQ

B: RSS, 12 Errol Street, EC1Y 8LX

Approx. 5 minute walk



Day 3

Timings and themes:

08:50?		Introduction - Key messages -Customer Experience - Customer Service	
09:15		Recap – Quiz / Questions What Financial Services do we do? Whats a related conversation Introduction to related conversation DLP	
09:45		Practicals International Parcellforce Transcash Business Banking (include/weave in a transaction paying by cheque)	
10:30		Break	
10.45		Travel Travel Insurance Travellers Cheques – overview and practical Credit Card (Include / weave in a transaction paying by cheque)	
12.15		Security Considerations Open Plan vs Fortress	
12:30		Lunch	
13:15		Session 3 Car Tax Send home those who don't need car tax or passports	
15:00		Break	
15:15		Session 4 Passports Check and Send	
16:45		Summary to day	
17:00		Finish	

Post Office Day Trainer's Notes V0.64

Post Office Day Training Overview

To accompany the new online training modules, this is day one, for all staff serving in Post Offices, with the focus on becoming familiar with the practical aspects of serving our customers using the Horizon system and other tools. We will aim to give delegates **confidence** through a hands-on experience, and giving feedback on how well they are interacting with their customer.

We are also weaving into this days training:

Understanding the Customer's point of view
Compliance
Skiing downhill
Understanding effective communication
Open Questions
Sales Conversations
Practical sessions on Inland Mails, Travel, & International Mails
Practical examples of Cash withdrawal, (POCA & debit card) & Bill Payment
Mail Segregation
While trying to avoid information overload!

Timings and themes:

08:50		Introduction - Key messages -Customer Experience - Customer Service
10:30		Break
10.45		Ready to Serve - Inland Mails (1st set of practicals, simple to start)
12:45		Lunch
13:30		Travel Services (2nd set of practicals, including sales conversations)
14:45		Break
15:00		International Mails (3rd set of practicals) - End of Day
16:50		Finish

Post Office Day Trainer's Notes V0.64

<u>Time</u>	<u>Topic</u>	<u>Objective</u>	<u>Delivery</u>	<u>Resources</u>
08:40	Delegates Arrive	Ready to start at 8:50. Less interruption for working branch	Welcome, show delegates where the toilets are etc.	Room Set Up, Posters, Projector etc
08:50	Introduction	Set Context and boundaries for the day	"Good morning everyone. You are all very welcome to this important part of your training to serve our customers at the Post Office. Please remember the information we are covering is also available online. Today we want to concentrate on the practical elements that cannot be replicated online and ensuring everyone understands what they need to do, how they need to do it, and where necessary, the reasons behind why we do what we do." We will be giving you some information, checking what you have learnt online, and also serving customers when they come in.	Opening Slide
			Domestics (no smoking in or near Post Office building, Fire Exits/Meeting Point/Tests, Break times, Mobile Phones, Etiquette of learning in a live Post Office if relevant. AOB/questions to be captured on Post-Its.	Slide domestics, Flip Chart (if room for it), Post-its.
09:10		To get to know each other and remove personal barriers	Trainer to answer the questions first. Give them your name, where you're from, followed by the role and the branches you support. Then give a positive response to How you feel about working in the Post Office, and then finally your favourite food. This will set the tone for the delegates to follow.	Getting to know each other Slide

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09:20	Objectives	To create an understanding of the shared goals for the day. Ensure all delegates understand both what we will cover, and also what we won't. The reason we won't is because if we include what an individual wants, we will need to exclude something that everybody needs.	<ul style="list-style-type: none"> • To be confident serving our customers in our key product areas of Mails and Travel Services. • To understand the Customer's Experience in the Post Office, in order to deliver consistently excellent Customer Service. • To be proficient with the Horizon System for key transactions. • To gain an understanding about why compliance is important. • To develop an understanding of the What, the How and the Why we do what we do. <p>"By way of an introduction to how we do things in the Post Office here is a film which introduces our promise"</p> <p>Click on picture to start video – Note to trainer – ensure hyperlinks work on your laptop prior to first training.</p>	Slide Today's Objectives

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09:35	Post Office Values	Delegates to understand how and why we do what we do.	<p>Introduce the values of Care Challenge Commit. Ask: Who do we care for? (Customers, Colleagues, Ourselves) What do we Care about? (Doing the best we can). Care is the cornerstone of our business. It means valuing people and their time; making it personal; listening and understanding; being guided by our conscience and expertise; and keeping our word. In short, it means doing right by people, whether they're our customers, colleagues or partners. This is what sets us apart and gives us our competitive edge.</p> <p>Who/where/what do we challenge? (Ourselves to do our best, our colleagues to meet the highest standards, the business to be the best it can be). Challenge conventions, challenge complexity, challenge competitors, challenge on behalf of our customers, challenge each other, challenge yourself. We've been passed the baton of this great institution. It's up to every one of us to drive it forward and create change for a successful future.</p> <p>What do you understand by Commit? We don't just work for the Post Office, we're part of it and we're all responsible for its commercial success. The road ahead is exciting, but not easy. If each and every one of us invests all our energy, creativity and passion we can achieve amazing things. Are you in?</p>	Post Office Values Slide
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	Homework	To add a personal understanding of our values	"In order for each of us to embed the values in our behaviour on a day to day basis, it's important that we are clear on what the values mean to us as individuals. So I am going to give you a handout now, for you to complete on your own, and bring back to the training tomorrow. It allows you to write your own personal definition of each value. There are no wrong answers so please spend a few minutes on this later on. Feel free to discuss it with members of your family to get different views if it helps you get clarity for yourself.	Values Handout
09:45	Your Post Office Journey	Recap On-line learning	Confirm online training completed, including compliance workbooks and P250 Vetting packs completed.	Slide Your post Office Journey

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		To focus on the positive things they have learnt rather than a quiz which might highlight what they haven't learnt or forgotten.	<p>Ask: What did you learn? Keep it light, and have teaser questions ready to draw out learnings from all delegates. E.G. Were you surprised at the range of products and services we offer? What products/services do we do that you didn't know about? What are the different options for sending a parcel in the UK? Describe what Dangerous Goods are? What have you used the Post Office for? If you were going on holiday, what could you go into the Post Office for? What else? If you were stuck serving a customer, where could you go for help?</p> <p>Remember, there is a lot of information to learn about all the products and services we provide at the Post office. All your Online training is available to recap, and you will have a trainer with you for two weeks when you start to cover the unique situation of your Post Office. There are other numerous sources of information and support, and we will be covering those in the two days you are here.</p>	
09:50	Recognising the uniqueness of the Post Office		What do Customers value about the Post Office? Trust - Customer Service - Our place in every community	Slide The Post Office

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09:55	Recognising the business landscape		What choices do customers have in each of our product areas? Guide delegates through each of the areas and ensure a number of answers for each. Get them to recognise that there aren't black and white answers for everything. e.g. Different situations in different branches. Note to Trainer: If you have a flipchart, you could write each of the product areas on the flip and get the delegates to call out the answers which you write down, increasing the interactivity of the training.	Slide: We are in a competitive business
			How do you feel when you don't have a choice? Recognise that's how some people feel when coming into the Post Office? Some may feel disempowered, disenchanted, others may feel grateful	
			How do you choose which supermarket to go to? Or which bank? We recognise that many/most of our products can be bought from a variety of suppliers, so we have focused on creating great value for money products, delivered with the highest levels of customer service.	

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10:05	Customer Service	To raise awareness of Customer Service and the impact it has on buying decisions	Depending on your number of delegates you may want to put them into two groups. "You have been given 15 well known brands and also 3 x cards containing either the word "WOW" "OK FOR NOW" & "OW". Position each Brand under one of the cards based on the consensus you reach as a group based on the overall Customer Experience you believe the Brand offers. As a group you have 7 minutes to decide which column to place each brand."	Slide Brands Exercise, Laminated game cards
			Open up a discussion why they have chosen to put who where, starting with the well-known names before coming on to the Post Office. There are no right answers, all opinions are valid, but need to recognise how people feel affects how & who they shop with.	
			"As a business we know that we need to offer great products, at good value, with excellent customer service – on a consistent basis"	
	Consistent Customer Service		Show slide with key elements that can be replicated across every post office in the country. Relate this to mystery shopping and Voice of the Customer and explain briefly the two programmes and how we use them to ensure high standards in what we do across 10,500 branches and 55,000 people. Ask delegates what they think each part means and what they can do to meet the criteria for each point.	Slide Consistent Customer Service

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	What do you want for your customers?		<p>The key message in this slide is that it is easy to get complacent and lazy – it's easy to assume that we know what customers want. And if you have a queue building up sometimes we assume rather than be certain, and could cost us. How does a customer go from satisfied to dissatisfied? (Circumstances beyond our control. Eg. "I'd like this letter to go first class" "ok, that's 62p please" and the letter doesn't arrive the next day. To make them delighted when they ask: ""I'd like this letter to go first class" Check: "Would you like it to arrive tomorrow? We can send it Royal Mail Special Delivery Guaranteed, which is a tracked and signed for service, guaranteeing delivery before 1 o'clock tomorrow for £6.40. Would you like this service? Then if the customer asks how quickly the first class will get there and you respond: "93% of 1st Class mail arrives next day, but it's not guaranteed" It's now up to the customer to choose whether to take the risk with the lower priced service, or to choose the guaranteed service. This puts the decision making where it should be – with the customer, and empowering customers leads to them being delighted. Of course, as experts in mail, we can advise, particularly if the customer tells you what the consequences would be of non-delivery.</p>	Slide: What do you want for your customers?
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			<p>"If I showed you an envelope or packet is there anyone in the world who could tell you exactly what's inside it? (apart from the sender of course! And Superman!)"</p> <p>"What does a millionaire look like?"</p> <p>We need to be asking questions and not assuming. That is the only way we will be able to ensure the customer has the right product.</p> <p>"How do you know if someone's circumstances have changed?"</p>	
10:15	Post Office Standards		Minimum Service Standards – ask delegates if they can remember the Minimum Service Standards, and then reveal them.	Slide Post office Standards
			WHY is this important to the customer ? Consistency	
			What does it mean to you? Extra Income	

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10:20	3 V's	Understand the 3 elements of communication	Link the quality of Customer Experience to the quality of our communication and introduce the 3 V's. Visual, Vocal and Verbal. Explain Visual is what we take in through our eyes Verbal and vocal through our ears, verbal are the words we use and vocal is the tone, the way we say it. Give examples (Visual is Body language – demonstrate poor body language and ask them “What is my body language saying to you?” Mention eye contact and smile as key elements of body language in the visual space.) To Demonstrate vocal click to next slide – I DIDN'T SAY SHE STOLE THE WATCH and make the statement a number of times, emphasising a different word each time, showing that when you do the meaning changes. and demonstrate that if there isn't alignment, we believe the tone or the body language over the words. Note to trainer: If you have room on the walls, you can put up the 3V's poster and I DIDN'T SAY SHE STOLE THE WATCH poster and refer to them to	Slide The Power of Communication.
			– I DIDN'T SAY SHE STOLE THE WATCH and make the statement a number of times, emphasising a different word each time, showing that when you do the meaning changes. and demonstrate that if there isn't alignment, we believe the tone or the body language over the words. That doesn't mean that words aren't important. They really are, and to demonstrate we have a video to show you	Slide: I DIDN'T SAY SHE STOLE THE WATCH
10:25	Power of Words		Show Power of Words Video	Slide power of Words, Video, Projector
10:30	Break			

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10:45	Ready to Serve	Introduce Horizon and ready to start the practical session.	Introduce them to the Horizon Terminal, Scales, Credit Card Machine, Barcode Reader, Stock, Date Stamp and explain the importance and function of each.	Slide Tools of the Trade
			Ask delegates to log in using class log in and attach to BB stock.	
	Mail Services		The biggest part of our business, over 50% of customers come in for mails and it contributes around 40% of our income as a business.	Slide Mail Services
			We will go through what we have to consider in order to deliver excellent customer service, and how we deliver it practically, focusing on what we say, how we say it and what we do physically.	
10:55	Points to consider	Testing the delegates knowledge from the online modules.	Go through each of the points, using 'Advent Calendar' style poster with starbursts, facilitating discussion to its relevance and importance. Poster words include: Destination, Size, Weight, Value, Speed, and Contents? (If you are delivering in a training room that doesn't have space for the poster, use the slide: Inland mails considerations	Advent Calendar Poster with Starbursts. Or Slide Inland Mails Considerations

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	Different Mails Services	Cover off the different services and understand the what they offer and which might be appropriate for the customer	We have quite a few different services we can offer our customers, designed to meet different requirements and offering the best value we can. Show Guaranteed Slide, ask delegates to tell you what the services are, go through the choices and tell delegates that Horizon will guide you through the choices. Show Confirmed Slide and guide delegates through as before, and again for standard services.	3 Slides: Inland Mails – Guaranteed Services, Confirmed Services & Standard Services

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11:00	Practical Mail Work	To put into practice what the delegates learned online.	Pair up delegates so that one is the customer (A) and one is the server (B). Swap pair around with each scenario so that both get experience of being server and served, so see things from both points of view. Intersperse with a scenario where you are the customer and all delegates are serving (to see if they are aware of last post time later on)	Practical Tool Kit (Laminated Customer cards, Paper Parcels, POCA & Debit Cards)
			<i>If there is an odd number of delegates, make one group work as a 3, with the 3rd giving feedback OR trainer to pair up with someone.</i>	
			Go through different scenarios on Scenarios Sheet. Ensure you cover at least first four scenarios, more if possible, but stick to timings. Each scenario has a number of questions that the server may ask, with the answers filled in. If the server asks you any other questions, please role play. Customers – please remember your job is to support the learning of the server, who will return the favour in a moment. After the role play, debrief 'Customer' first, how was the experience for them? How did they feel? Encourage honest answers, not 'nice' answers, recognising we are learners, and we can all learn from the mistakes, and that there is a lot to learn and practise. Then debrief 'server' how was it for them? Keep it light, we are going to do many practicals, and repetition will drive the learning.	

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			As you go through different scenarios bring in different points, ensuring accuracy, ensuring the customer gets the service that's appropriate, Skiing Downhill, Dangerous Goods, Sizing, Mail Segregation, Weight (How often should you check your scales?) Packaging, what packaging is ok, and what isn't? The quality of the conversation, the words used, the tone, the greeting, the smile, the eye contact, (don't get involved with Horizon at the expense of your relationship with the customer). Where do you put the envelope/parcel when transaction completed? Are we feeling cared for or sold to?	
11:55	Home Shopping Returns	To understand in what ways Home Shopping is different to standard mail services.	Recap on Home Shopping returns and then complete Practicals 9 so everyone has a go in role play mode.	
			Stress that this process is only used for items with the labels shown, and that freepost items just require a COP.	
12:15	Parcelforce Services	To recognise the differences in Royal Mail and Parcelforce Services and when each would be appropriate	Recap on Parcelforce services and complete Practical POD 08-07 PFWW Express 24 and POD 08-08 PFWW Express 48 Consignment	Slide Parcelforce,
			Note Parcelforce items do not require postage labels, and that customers should be handed T&C leaflet and sign horizon receipt to confirm they understood them. If branch does not have a daily	

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			collection, they should phone Parcelforce to arrange collection once taking an item.	
			If the customer needs global express, tell them the nearest branch that does it.	
12:30	Questions	Keeping delegates questions answered at the appropriate time	Cover off any relevant questions written on Post-its.	
12:45	Lunch			

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13:30	Travel Services	Introduce the Bureau de Change, the services and the benefits to the customer and ourselves	Ask the questions on the slide teasing out the differences for example in a customer wanting holiday spending money and a business trip. Discuss the different branch propositions - some only pre-order, others having several currencies. Explain all branches can buy back currency from customers with a Post Office receipt.	Slide Travel Services
13:40		Introducing related conversations	Practical exercise – Do first scenario. Reference the BETTER amount which we should offer first and again, Ski Downhill! Reference the Ski Downhill poster. Ensure that they still offer the other services if appropriate, or if too late let the customer know of the service and it's benefits for next time.	Practical Tool Kit (Laminated Customer cards) Poster
13:50	Travel Money Card	Introduce the benefits to the customer and to us.	<p>Ask if anyone has ever lost money when abroad or had it stolen? What was the impact on them? (Note: Trainer to have story ready in case the delegates don't) How did they feel? Would they have liked to have a safe way to take money abroad? Then bring up the slide. Go through the features and benefits.</p> <p>Accepted in 32million locations in 210 countries Control your holiday spending Peace of mind over carrying cash Zero charges on purchases saves you money Protection if lost or stolen</p> <p>Ask if anyone has one? Do they have the App? (Trainer could have the App on their phone to demonstrate).</p>	Slide: Travel Money card plus

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	Holiday Stats	To see the width of coverage, and also to energise post lunch.	Take a blank sheet of paper, and write numbers 1 to 10 down the left hand side. Now fill in the last 10 places you went to on your holidays. Include UK holidays. Then check to see how many places they could have used a TMC.	
			57% of Holidays taken by Brits are in this country (£ Sterling TMC) Of the holidays taken abroad 64% are to Euro countries (Top 4 Spain, France, Italy & Ireland) 5% are to the USA, and approx 6% to the other countries that we have TMC's for Australian and NZ \$ or countries that take US\$ like Brazil or many Caribbean countries. (Source: International Passenger Survey, Office for National Statistics)	
	What else might a customer need?	To ensure our customers have all they need for their trip, and we maximise our business opportunities.	Ask: What other travel services might customers need when they travel abroad? Ask what are the benefits of Travel Insurance? The Foreign and Commonwealth Office reports that 24% of holidaymakers in 2012 were uninsured, a large proportion of which were 15-24 year olds, the group most likely to indulge in adventurous behaviour whilst on holiday. Men were less likely to take out insurance and 16% of travellers were under the assumption that the UK government would pay for any treatment abroad. When you consider that 3,793 Brits were hospitalised during their holiday in 2011/12, it makes you realise just what a risk some tourists are taking, and how important Travel Insurance is, and what good value it is.	

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			Ask: Who is the largest independent travel insurance provider? (The Post Office of course!)	
14:00			Practicals: Do at least 2 more travel scenarios. Reference the BETTER amount which we should offer first and again, Ski Downhill! Reference the poster. Ensure that they still offer the other services if appropriate, or if too late let the customer know of the service and it's benefits for next time.	Practical Tool Kit (Laminated Customer cards)
			Ensure you discuss the benefits and features of the Post Office Credit Card(s), The Passport Check and Send service, and travellers Cheques. Reference the online training and the DLPs which they can use to learn all the information. Advise delegates to ensure that their branch codes are on literature so that they get the remuneration they deserve.	
			Remind delegates that 'Delighting' customers is about going that extra mile, ensuring that they have what they might need for their trip. It will also mean that we earn more money, which is a great example of win-win!)	
14:30	Moneygram	To understand what it is and what customers might use it.	What is MoneyGram? A way to send money abroad safely. What are the benefits to the customer? Speed – Typically arrives within 10 minutes. What are the alternatives? Many competitors such as Western Union.	Slide MoneyGram
			What do we have to be aware of with MoneyGram transactions? We need ID plus proof of address as MoneyGram is open to fraud. Explain money laundering implications. How long do we retain	

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			completed MoneyGram forms? 5 Years. How do we find the country codes? Via Horizon Help. How many of our branches is it available in? All, that's over 10,500 branches. How can customers pay? Cash only. What is the maximum amount we can accept? £1,000 in Locals, £5,000 in Mains/Crowns. For good customer service, what would you do if a customer wants to send £2,000?	
			Complete MoneyGram Send practical no. ?? . Note the service is cash only so get the money before you start the transaction. (What could you do if they don't have cash on them?)	MoneyGram Practical Send Form
			(if time allows MoneyGram Receive practical no. ?? can be completed)	MoneyGram Practical Receive Form
14:45	Questions	Keeping delegates questions answered at the appropriate time	Cover off any relevant questions written on Post-its	
15:00	Break		Cover up 'Advent Calendar' poster with starbursts during break	

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15:15	International Mails	To understand the main differences to consider between inland and international mail.	As we did before with Inland Mails, go through what we have to consider in order to deliver excellent customer service, and how we deliver it practically, focusing on what we say, how we say it and what we do physically.	Slide International Mail Services or poster
			What is different with the International Mails? What else do we need to consider? Go through the slide, which brings up the same elements as for Inland mails, but this time highlights in red the extra considerations when posting abroad. Explain that the service is delivered by two carriers, Royal Mail (or Parcelforce) and then the carrier in the other country. So we have had to create agreements with hundreds of other countries with different levels of sophistication and infrastructure. Which is why there are different country anomalies. Because they are imposed by the other country. But the easiest way to deal with the differences is to let Horizon guide you through. The first question it asks you is Where's it going? And then will offer you the appropriate service and guidance for that country,	International Mail Considerations Slide
15:20			Go through different scenarios on International Mail Scenarios Sheet Nos ??-???. Debrief 'Customer' first, how was the experience for them? How did they feel? Encourage honest answers, not 'nice' answers, recognising we are learners, and we can all learn from the mistakes, and that there is a lot to learn and practise. Then debrief 'server' how was it for them? Keep it light and encouraging.	Practical Tool Kit (Laminated Customer cards, Paper Parcels, POCA & Debit Cards)

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			As you go through different scenarios bring in different points, as you did earlier ensuring accuracy, ensuring the customer gets the service that's appropriate, Skiing Downhill, Dangerous Goods, Sizing, Mail Segregation, Weight (How often should you check your scales?) Packaging, what packaging is ok, and what isn't? The quality of the conversation, the words used, the tone, the greeting, the smile, the eye contact, (don't get involved with Horizon at the expense of your relationship with the customer) Are we feeling cared for or sold to?	
			And also bring in 'Related Conversations' in the International Mails area? How can we identify opportunities? What are the effective questions?	

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15:45	Who Am I Game?	To illustrate the effectiveness of Open Questions	"We are now going to play a game to demonstrate the effectiveness of different types of questions" Explain the difference between closed and open questions - One usually gets a one word answer mainly yes or no, the other gives a lot more information. "I will pretend to be a celebrity, and you need to guess who I am by asking questions" Split them into two groups if more than 4 delegates and be a different celeb for each group. Choose a celebrity that you can answer questions about (Tip: Don't use any celebrity with a single name or you could be caught out!) You can ask me 5 closed questions (or maybe 1 minute of closed questions). If they ask you an open question, just respond, that's not a closed question. After they have been asked and hopefully not established who the celebrity is, offer them 4 more questions, 2 closed and 2 open, in any order to establish who you are. They then should ask good open questions like What are you famous for? And you can give them lots of info which will lead to the answer. They may ask "What's your Name" which is a valid open question and you can answer it.	
			The key to the game is learning that a series of closed questions feels like a bit of an interrogation, whereas open questions feel friendly and that you are interested in them.	
16:00			What are good open questions we can ask to establish any related opportunities?	

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			Possibilities: Who are you sending this to? How else do you stay in touch? (Where could these lead to?)	5 W's Poster or slide
			What others? Allow them to come up with suggestions.	
16:15	Recap	Embed learning	Practical scenarios - Trainer as customer to each delegate in turn, if time and if appropriate, including one Special Delivery past the cut off time.	
16:50	End of Day	learn End of Day Routines	How do you finish the day in your shop?	Slide End of Day
			What we do are: Daily reports, in order to run checks and send off with the postman. Practise this	
			Cash Declaration, for your information and also to allow us to allocate future cash requirements. Practise this	
			Priority Mail Despatch, and Standard Mail Despatch. If time go through what's involved, or tell them that the on-site trainer will cover this.	
	Handouts & Guides	Collect contact details	Delegates to provide an email address for us to send a zip file with the relevant hand outs and guides. If missing contact details, ensure you have got them by this point.	Delegate Attendance Sheet Family Tree of Support Contact

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				Numbers

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17:05	Questions	Keeping delegates questions answered at the appropriate time	Cover off any relevant questions written on Post-its	
	Close		How are you feeling? Ready to give it a go? Reminder to do Values homework and bring in tomorrow	
			I look forward to supporting you tomorrow, safe journey home	
17:20	Finish			

Postmaster Essentials Day Trainer's Notes V0.73

Postmasters Essentials Day Training Overview

This second day builds on the first day and covers a recap of day 1 learning, learning about the responsibilities around running the business successfully, together with lots of practise practicals, both of customer transactions and the management tasks such as balancing, cash management etc. We will aim to give delegates **confidence** through a hands-on experience, and giving feedback on how well they are interacting with their customer and each other.

We are also weaving into this days training:

Everything from yesterday, plus:
Raising the bar on the quality of conversations
Where to access support appropriately
Management Information
Prospecting
Security
Practical exercises of balancing etc.

Timings and themes:

While trying to avoid information overload!

08:50		Objectives – Recap of yesterday - Practical
10:30		Break
10:45		Post office Bigger Picture – Running a successful business (customer service, maximising income) Practical
12:45		Lunch
13:30		Cash Management – Remittances - Practical
14:45		Break
15:00		Balancing – Losses/gains – TA's/TC's – Trading Period - Practical
16:50		Finish

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<u>Time</u>	<u>Topic</u>	<u>Objective</u>	<u>Delivery</u>	<u>Resources</u>
08:40	Delegates Arrive	Ready to start at 8:50. Less interruption for working branch	Welcome, show delegates where the toilets are etc.	Room Set Up, Projector
08:50	Introduction	Set Context and boundaries for the day	Today is a recap of what was covered yesterday. We will then look at how to run a successful business and also to look at the responsibilities particularly around the amount of cash you will be looking after. Please remember the information we are covering is also available online. Today we want to concentrate on the practical elements that cannot be replicated online and ensuring everyone understands what they need to do, how they need to do it, and where necessary, the reasons behind why we do what we do.	Slide: Welcome
	Housekeeping	Keep delegates safe	Domestics (no smoking in or near Post Office building, Fire Exits/Meeting Point/Tests, Break times, Mobile Phones, Etiquette of learning in a live Post Office if relevant. AOB/questions to be captured on Post-Its (those that can be answered during the day can be dealt with; those that can't share with delegates where to go for help. (Quick recap)	Slide: Domestics Post-its.
	Introductions	To get to know each other and remove personal barriers	Icebreakers: If there are any newcomers, ensure introductions are done, otherwise go round the room and ask what was the most significant learning from yesterday (for them).	Slide: Introductions