

Post Transfer Visits - Customer Feedback Report

Following the Training Review feedback was sought from new agents at the 3 month Post Transfer Visit (PTV). The feedback questionnaire requested responses in areas such as which transactions new agents felt most and least confident with, whether the training was sufficient, etc. Feedback was collated at PTV's from Period 9 to Period 11 2011. 88 responses were received during this time and form the basis of the following results.

Questions asked:

Q1. Do you feel you have had sufficient training to enable you to process all PO transactions?

76% answered **Yes**
14% answered **No**
10% did not answer

Q2. Which transactions do you feel most confident in dealing with?

34% of answers included **AP/Banking** transaction
33% of answers included **Mails** transactions
24% of answers included **All** transactions
14% of answers included **daily/regular** transactions
5% of answers included the **basic** transactions
1% of respondents were confident with each of the following transactions: Travel, MoneyGram, Passports, DVLA, Telephony and Balancing/Rems.

Q3. Which do you feel least confident in dealing with and why?

Answers to this question were varied and not many included reasons as to why they were not confident. The main responses were:

17% answered **None**
12.5% answered **infrequent transactions**
7% answered **Parcelforce**. Reasons included the variety of services and complexity
7% answered **Bureau**. Reasons included not many transactions completed and not enough training
6% answered **Financial Products**. Reasons included not enough training and no leaflets
6% answered **NS&I products**. Reasons included infrequent and need more practise
6% answered **Savings products**. Reasons included infrequent
4.5% answered **Back Office/Daily Dispatch/Transfers**. No specific reasons given
4.5% answered **Balancing**. No specific reason given
4.5% answered **DVLA**. Reasons included complexity and do very little

4.5% answered **Passports**. Reasons included not completed very often

From the responses it appears that most new agents are least confident with transactions that they do not see very often.

Q4. Do you feel you have had sufficient training to enable you to prepare the office balance (Branch Trading Statement)?

72% answered **Yes**
22% answered **No**
6% didn't answer

Q5. In which area of the PO operation do you feel most confident?

24% felt most confident in **all areas**
23% felt most confident in **customer service**
15% felt most confident in **everyday/frequent** transactions
11% felt most confident with the **Front and Back Office**
10% felt most confident with **Mails** transactions
6% did not answer

Other responses included Balancing/ Rems/Counter/training.

Q6. In which area of the PO operation do you feel least confident and why?

Again these answers to this question were varied and did not include reasons why.

29.5% answered **None**
17% felt least confident with **balancing**
12.5% felt least confident with **infrequent** transactions
7% did not answer
4.5% felt least confident with the **Back Office**
3% felt least confident with **selling**
3% felt least confident with **all transactions**

Other responses included Financial products, Helpline, NS&I/Savings, Rems, Reversals, PFWW, Redirection, talking to customers, Lottery, Transfers, POPOS, cheques and Transaction Corrections.

Q7. Do you understand the requirement to log on to the Horizon system in your own name / user ID? Tell us why this important in a few words.

It appears from the responses received, with the exception of two that did not answer, all respondents understand the requirement to log on to the Horizon system in their own name/User ID. 9 responses, although answering yes, did not include a reason why.

Q8. Are there any areas where you feel you need more training / support? What are they?

50% answered **None**
18% felt that they needed more training in **Balancing/Trading Period (TP)**. TP not supported by a trainer.
11% did not answer

7% felt that they needed more training in **selling**
3% felt they needed more training in **Financial Products**

1% of respondents felt that they needed more training in each of the following areas; New products, Rems, Ordering stock, Bureau, correcting end of day cheques, Help function, Lottery accounting, MVL destruction, DVLA, IPS and NS&I.

Q9. Do you understand the branch standards requirements and your responsibilities in regard to them?

93% answered **Yes**
1% answered **Not really**
6% did not answer

Q10. Is there anything that you felt was missing from your classroom or on-site training?

61% answered **No**
9% did not answer
6% answered **Balancing at TP**
3% felt that there was **not enough time on the transactions**
2% felt that there should be **more practical and less product training**
2% felt that the classroom training **should meet individual needs**
2% answered **Back Office**

Other responses included philatelic, too much sales, customers, reversals, sales, savings, PPI and too much sitting and listening to the trainer.

Q11. Do you feel the time spent with the trainer was:

1. **Worthwhile** - 62%
2. **Useful** - 7%
3. **Sufficient** - 6%
4. **Too much** - 1%
5. **About right** - 14%
2% answered classroom was insufficient/dreadful and 8% did not answer.

Q12. How did completing the required training interfere with running the rest of your business:

1. **Not at all** - 65%
2. **A little** - 19%
3. **A lot** - 7%
4. **Too much** - 2%
7% did not answer

Q13. The Network Field Support Team are committed to continuous improvement through its people and processes. Please tell us your views below on both the Field Support Advisor and the activity delivered, and how we can improve on either.

47% did not respond to this question.

32% of those who responded stated that **their trainer was good/knowledgeable/excellent**

21% of those who responded stated that **their training was good.**

6% of those who responded would prefer less time in the classroom and more time on site.

4% felt they would benefit from some experience in a live environment prior to working in their branch.

4% felt that there should be more time for training

Other responses included:

- Extra training on balancing
- Good as didn't have to pay
- More handouts for irregular transactions
- Teach FSA's day to day processes for Horizon
- Post Office should re-train all staff each year to cover changes
- PTV not good as single position office and loads to go through
- Talk to the same person at NBSC until problem resolved
- Would like to sell more products e.g. DVLA, IPS, Travel Insurance
- 3rd party companies offer a poor service e.g. Sign 2000, St Ives and Bank of Ireland.

Summary

From the above results, the majority of new agents who completed the feedback questionnaire feel that they have received sufficient training to enable them to process transactions and prepare the office balance.

The transactions that the respondents highlighted as feeling most confident with were Automated Payments/Banking and Mails. The transactions they felt least confident with were balancing, especially the Trading Period (TP) balance, and infrequent transactions.

To address this, the new training offer now includes a full TP balance at the Follow up Balance regardless of whether or not this date is the branch's scheduled TP balance. Emphasis has been placed on the use of Horizon Online Help to assist in areas that the agent may be unfamiliar with so that they can help themselves and not automatically call the Helpline when they come across a transaction that are have not seen before.

Half of the respondents felt that they did not need any further training or support. From those who did feel that they needed further training/support 18% replied that they required further

training in the weekly and TP balances. 7% replied that they required further training in selling.
As part of the new training offer the agent receives coaching on the Minimum Service Standard conversations and as part of their Performance Assessment they are assessed on the quality of their conversations both in the classroom and on site at their branch.

The majority of respondents understood both the Branch Standards requirements and the security requirements for logging on to the Horizon system.

Over half of the respondents felt that nothing was missing from their classroom or on site training. Out of those who felt there was something missing 6% replied balancing at TP and 3% replied not enough time on the transactions.
The classroom timetable has been reviewed and the timings for each session have been re- evaluated and include a mix of product knowledge and practical sessions.

Overall, over 75% of the respondents felt that the time spent with the trainer was Worthwhile/Useful/Sufficient and 84% felt that the training only interfered with the running of their Business a little or not at all.

Over half of the respondents who stressed a view on the trainer felt that the trainer was good/knowledgeable/excellent and 21% felt that the training delivered was good. Possible areas for improvement included spending less time in the classroom and more time on site and experience in a live branch prior to training.
The new training offer now includes 8 days classroom training instead of 10 with on site training starting from the transfer day instead of the following day.