

Introduction to Post Office Local

Information for
Field Support Advisors
On
Post Office® Local branches



In Commercial Confidence

NOT TO BE LEFT IN BRANCHES

Introduction to Post Office Local

This document will evolve as the project progresses and so it is important to revisit it each time you are due to complete onsite support for this model. You need the most up to date information to contribute to the continued success of this project.

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1 week before you attend a PO Local branch to provide training support, YOU must contact the branch to confirm that they have received & completed a copy of the Onsite Training Schedule to organise staff to be available for you to support (forward a version to them via email were possible; if they haven't completed one, with the instruction to complete it and return it to you a.s.a.p. , it is on page 5) & to confirm that all staff members due to undertake Post Office training have completed or will have completed by

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the first day of support, the mandatory *Post Office Foundation* online test for compliance .

This will be dependant upon them having access to Horizon prior to Go-live, so we may want to emphasise this and clarify that as a minimum the training should be completed if Horizon is not available.

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MODEL OUTLINE

Post Office Ltd is committed to exploring opportunities to maintain access to products and services by providing an alternative form of convenience outlet. Post Office Ltd has been trialing new concepts for delivering Post Office services falling under the branding of Post Office Local.

N.B **Post Office® Local** was referred to as **Post Office® essentials** for part of the pilot phase and you may still see branding & references to Post Office® essentials: going forward all branches will be branded **Post Office®** however, if there are any outstanding references to Post Office® essentials in any documents it should be assumed these references apply to **Post Office® Local** (e.g. Operating Manuals). Internally, Post Office Ltd will refer to this branch segment/model as **Post Office® Local** to distinguish it from the other models we are rolling-out,

The Post Office Local service is available all the hours that the retail host is open which in most cases will be 7 days per week

- The new service is designed to be automated in almost all areas which reduce costs significantly.
- Automated services are straight forward to follow as all the instructions are available on the HOL screen meaning staff can keep up to date with transaction easily.
- This service offers a wide range of core Post Office products and services, including electronic banking, bill payments and budget payment schemes, Post Office® Card Account withdrawals, Postal Orders and postage, inland letters / packets and parcels (including recorded delivery, special delivery & express24 & 48), international letters / packets, or the individual country limit for small packets or printed papers. Customers can also Pre-Order foreign currency for collection the next day. Services **not available** via Post Office Local include:
***cheques** as a method of payment, **transcash bills** (non automated payments), **paper-based banking transactions** and **Parcelforce Worldwide International (excluding BFPO parcels)** items are **not accepted**.
- Post Office Local open plan service point is located alongside retail till.

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- Post Office Local branches will **EITHER** be Retailer (Operator) cash funded **OR** will receive POL remittances in the normal way.

Apart from this all the procedures and processes are the same.

*At selected branches transacting MVL's, cheques will be accepted but this is as payment for MVL's only.

Please make sure you read (without printing) the appropriate **Post Office Local Operating Manual** as this will give you additional information you may require.

A copy of the Operating Manual will be sent via Email, directly to the Operator by HR (Farnworth) prior to commencement of the training, the FCA responsible for the office before it goes live will also provide the Operator with a copy of the correct manual but if it is claimed that this has not been received or deleted in error; the Field Support Advisor should email a copy* to the Operator at their first opportunity. (*if we have a version available)

FUNDING

Branches will **EITHER** be Retailer (Operator) Cash Funded **OR** will receive POL remittances in the normal way. Sometime in the week before you are due to attend the office to complete "Set-up" **you should be contacted by, or YOU should contact the FCA** responsible for the office to discuss details of the office & Operator/ staff mix and training expectations: they will be able to answer any questions you have. In most cases it makes sense for the FSA to call the FCA and you should plan to make the call while you are preparing for the support as the information you need may be answered easily by the FCA.

POL Funded Branches

Cash is received in the normal way via CiT. Stock will be supplied to PO Local branches via the cheapest method which in most cases will be by using RMSD, even when an branch is POL cash supplied.

Stock & cash can also be returned via CiT along with "BdeC Pre-order buy backs" and the standard Remittance Handouts should be used as it applies to this model.

Retailer Cash Funded Branches

(2.9 Inputting and Removing Cash Process Handout)

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Stock

Stock will be received and returned by Special Delivery (Shared Service), but still needs to be remitted in & out on HOL.

Cash

The funds required for retailer cash funded branches are provided from the shop till by means of the process in the Operations Manual, using icons 'Loan To PO' and 'Loan from PO'. (After automation new icons will be "Operator Cash - In/Out").

ALL OPERATOR CASH IN/OUT MUST BE ACCOUNTED FOR IMMEDIATELY AND FULLY ON HORIZON WHEN THE CASH IS MOVED. You must ensure that the Operator understands the Settlement Procedure -

Please make sure you & the Operator have read and understood the:

Handout for Automated Settlement (leave a copy onsite).

Use the **Daily settlement Example** from the PO Local EASE file and email copies of the spreadsheets contained at the foot of that example to the Operator preferably on the set-up day (*Daily Settlement/ Daily Settlement Printable*). These will help you explain the process (one is a working excel spreadsheet that has all the necessary formulas and the other is a manual version for use if a computer isn't available)

Ensure there is enough money in the Post Office at the start of each day for that day's transactions. Cash needs to be monitored on a daily basis and any surplus cash needs to be banked by the Operator in their nominated bank account as soon as possible. The Post Office will reclaim surplus cash via direct debit 3 days after a surplus has been declared.

During the training support it will be possible to judge how much money is required for each day's trading from the deposits made to the Post Office and the cash declared figure at the end of day (**ONCH to be completed before 19.00**).

For Retail Cash funded branches the *Best Practice* is to keep a float of approximately £3000 in the Post Office to start each day, depending on the transactions in individual offices

TRAINING SCHEDULE

PO Local Offer for new branches:

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The PO Local offer for all new branches includes full training on all transactions and products in a classroom environment over 3 consecutive days, for the Operator or Officer In Charge (OIC). This is mandatory for all new Operators.

There is a classroom prep-guide for PO Local & all the handouts will arrive at the classroom in the prep-box to be given to the attendee during the 3 days training.

While onsite the FSA will try to support up to 5 assistants to be trained on basic transactions and products. Each office will receive 1 day Set-up and then additionally onsite support for a period of 6/7/8 days which should be detailed in the Vacancy Report in regard to a timetable of trainees and their availability not exceeding:

- 6 days on site will be scheduled for 1 Operator and 1 Assistant
- 7 days for 1 Operator and 2/3 Assistants
- & 8 days for 1 Operator and 4/5 Assistants.

The FSA will be on site for normal core hours (approx 8.30 - 18.00 Monday to Friday and Saturday morning until 12:30).

A Follow Up Balance (FUB) will be added at the end of the onsite support and although PO Local branches can do their BTS at any time of the appropriate day, under BAU for the FUB one FSA will attend to support from 1600.

If full training for the Operator and all the assistants is completed early, the above time can be reduced - contact your FTL to discuss.

Assistant Tick-lists should be started for as many assistants as the time and the assistants availability allows. There is no maximum on the number of tick-lists that can be started but it is the Operator's responsibility to complete these tick-lists once onsite support has ended. When starting a tick-list, priority should be given to compliance completion and use of the HOL equipment followed by training on basic transactions and products. The rough number of assistants eligible to be trained at any site should be relayed to you during the conversation with the FCA before set-up. The length of training you will be expected to complete (6/7/8 days) will be detailed on the Network Support Schedule and any worries should be raised with the FCA responsible for the opening of the office.

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Below is a spreadsheet for the Operator to schedule their staff during the onsite training time. The FSA will be on site for normal core hours (approx 8.30 - 18.00 Monday to Friday and Saturday morning until 12.30). **The training schedule needs to be in place and agreed with the Operator before any set up or onsite activity begins. The FCA should have already made the Operator aware of this spreadsheet and you should have spoken to the branch in the preceding week to confirm this activity has been completed. This is necessary to maximise the use of the onsite support so that our support is structured. It will help focus the Operator on when they and their assistants need to be available for training, maximum two people at any one time, and everyone receives training during the allocated time on site.**



Onsite Training
Schedule v2.0

For the Operator a standard PSA should be used (including Action Plan) for assistants tick lists should be completed and any training gaps on the assistants tick list will be picked up by the Operator. Both PSA & tick lists are to be printed from EASE to ensure up to date versions.

Existing Agent to New Operator, On-site Conversion

If a new PO Local branch is opened by converting an existing Agent with existing staff in an existing location they will receive:

- 1 day set-up
- 1 Induction day (delivered on site in 2 x 3 hour sessions to reduce impact on retail operations)
- 2 days Onsite training- this is to deliver open plan training & security regulations and cover off the basic transactions for the new members of retail staff.
- A Follow Up Balance (FUB) will be added at the end of the onsite support and although PO Local branches can do their BTS at any time of the appropriate day, under BAU for the FUB one FSA will attend to support from 1600.

Full timetable embedded here:



3 Hour Induction
Timetable June 2012

PREP & SET UP DAY

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It is recommended that you log on to a live system using your HOL Global User Password prior to attending a PO Local branch where you are scheduled to deliver onsite support. Problems have been encountered and a password reset is needed via the usual channels if your password is not up to date.

For new branches a Greenfield stores pack will be sent to the office ready for the set-up day. The Operator will receive their training aide handouts in the classroom. You will only need to print a few items from EASE but it is essential that you are familiar with the material before the training support begins, and reading the items yourself may be time well spent. Feel free to print some extra items you may think relevant (handouts etc) from the EASE files to use on site for training with the Operator - you might want to suggest these as best practice via your Line Manager.

An easy guide to the use of the materials can be found by following the **PO Local Printing Guide**. You may need to allow extra time for personal development if this is the first PO Local office you are training or if you haven't delivered one recently, so please discuss this with your line manager.

For Converting Branches: you can print items from the PO Local EASE file from the "Onsite Section". NO handouts will be sent to a converting branch.

Additionally for converting branches, the Operators is responsible for the removal & disposal of all the transactional stock held before the branch conversion to PO Local - it is essential that you encourage/insist that this has to be disposed of as a priority and not used once the office is trading as a PO Local.

The Operator & all their staff MUST read:

- **"Working in a Screenless Environment"**

This should be completed on setup day or for any staff not available on that day, before they start working at the PO Counter. This is a vital part of their security training and should be revisited when new staff members are employed.

Here are some best practice and tips from the pilot branches:

- You **MUST** carry out a transaction on set-up day using a bank card (pin pad) as the method of payment or for a balance enquiry. This is to check that the system is working correctly. If the transaction fails **report it straight away** - if you wait until

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opening day, the fault is business as usual and therefore not a priority,

- Check HOL Help is working - report it to the NBSC if it is not.
- Ensure that the Horizon system is in the **correct TP**.
- Trading Periods should continue in the same group if the branch is converting to a PO Local (use the All Branches Database to determine their current trading group). If it is a new or re-opening, ask the FCA if they know which group the office is aligned to: if it is unclear, default to Group C.
- For a conversion the **Branch Code** will remain the same unless advised otherwise.
- Allow the operator to remit in the stock, then take them through a balance and roll over to the next BP. This will give them extra balancing practice.
- Check that the **Stores Ordering** icon is working, if not you need to report it to the NBSC.
- During the set up ensure that the Operator and any assistants who will be working in the post office are able to load and unload the safe as this will need to be done before the retail opens or after it closes and you may not be in attendance at those times.
- Order HOL consumables to demonstrate the low volume needed to ensure the branch understands these items are expensive.

POH140209 Horizon counter rolls

POH2510 Red ink

POH2511 Black ink

POH3501 Copier paper

POH4030 Paystation rolls

POH4020 Horizon Cleaner fluid

POH4021 Cleaner wipes.

- Enter the **Paystation** opening times on Horizon.
 - From the **Front Office** screen select:
 - Licences & Government (F5)
 - Compliance (F2)
 - Paystation hours (84)

When entering the hours it is important to remember to "backspace" 00:00 otherwise the system won't let you enter any figures.

Being Discreet.

Make the staff aware that they need to consider the importance of the open plan environment and they have a responsibility to keep as much information as confidential as possible - confirm that this is understood using the bullet points below:

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- Do Operators/staff realise the importance of being discreet?
- Do they know how to be discreet?
- Do they lower their tone of voice appropriately?
- Do they know to be as discreet as possible when counting cash?

Customers appreciate all the effort that is made to protect their privacy, so remind the Operator & staff to always take the time to consider the person they are serving and the other customers waiting in the branch.

Mail Segregation

Mail segregation is applicable in ALL branches regardless of size. Mail segregation standards must be met at all times.

Royal Mail Cut Off Times

Royal Mail will make their last scheduled collection of the day, at a specific time (this information will be gained locally by asking the Royal Mail Collection Officer or by contacting the local Royal Mail Sorting Office). **Once the last collection has been made, customers must be informed when Royal Mail will be making the next collection at the branch** (this will be the following day unless it is on a weekend or before a bank Holiday, in which case it will be the next working day that Royal Mail is working). You must make All staff aware of this instruction.

Standard PSA to be Completed

For **all delegates** attending a 3 Day PO Local Counter Skills Course, a PSA will be completed using the PO Local Classroom TAB (this is for both Operator & Assistants attending). These are to be saved in the standard PSA format and should be forwarded to the FSA completing the onsite support.

If you are completing onsite support at a PO Local branch you will be sent a PSA for each person from that branch who has attended a 3 day CSC. The PSA has 2 TAB's for PO Local onsite (Operator & Assistant). Only 1 PSA at a PO Local branch will be completed using the Operator TAB and for every one else who attended the classroom, you will use the Assistants TAB. At the end of the onsite support you will produce only one Learning Action Plan using the Operator's PSA and this should be forwarded using the standard PSA instructions.

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All members of the branches staff that did not attend a classroom CSC you will begin an Assistants Ticklist as they begin to use HOL. At the end of the onsite support, all gaps on Assistants PSA's & Assistant Ticklists must be communicated to the branch Operator/OIC so they are aware of the training they need to complete after we have left the branch. It is the Operator/OIC's responsibility to complete training at their branch for all their staff in an appropriate timescale.

In cases where the branch has multiple "Officers' In Charge", you need to put one of the names against the PSA. The aim is to cover everything detailed on the PSA and add notes against the areas that you feel may need additional focus.

BALANCING & TRADING PERIODS

It is at the **Operators discretion** whether they complete an office balance on a Wednesday for a **Balance Period (BP)** between Trading Periods (TP).

The branch has to complete a Trading Statement on the Wednesday that their Trading Group is scheduled to end their Trading Period (TP).

This should be done at a quiet time - it doesn't have to be completed at the "traditional" end of the day. If the quietest time is 8am or 10am or 2pm, a Trading Statement can be completed (**see note below regarding offices with Lottery).

The office must then REOPEN for business once the Trading Statement is completed regardless of what time of day it is (8.30am or 10.20am or 2.38pm) and continue trading and completing transactions. It does not have to be done at the same time each Trading Period either - just a quiet & undistruptive time for customers.

Transaction Corrections will NOT be generated if the office starts their new Trading Period immediately.

For branches of this size, an office balance (using the Stock Balance Summary held in the PO Local File on EASE) should not take long and should cause minimum disruption to customers.

****For Branches With Lottery.**

In line with normal practices for an office with a Lottery terminal, a separate stock (usually names OOH - Out Of Hours) should be set up by the FSA during the office setup. This stock should deal with Lottery transactions & **Lottery TA's** and suitable training should be given during the onsite support.

At **Trading Period** end, the **OOH** stock should be balanced at a quiet time.

It is recommended that no scratch cards are activated on Wednesdays.

Introduction to Post Office Local SECURITY

In all cases ensure Operator and assistants are aware of security requirements for open plan working. Full details are accessed via a Link in the PO Local file held on EASE. Ensure a copy of '**Post Office Local Security Standards for PO Local**' is available and has been read and understood by you and the agent.

Suggested Daily Routine Training.

While a branch is being supported onsite by a Field Support Advisor, it is essential that during the set-up day, preparations are made to ensure that the relevant counter safes are loaded before the branch opens & that safes are emptied and their contents secured in the evenings after the branch closes; this could be at 05.30 in the morning or as late as 11pm at night and onsite support is only for core hours (9.00 to 17.30 approx). If we help the branch form good habits from the beginning it will help their branch run more smoothly.

Embedded here is a suggested routine guide for members of the branch to follow to ensure the branch is ready to serve and the assets are secured after they close.



Suggested Daily
Planning Guide



Daily Planning Guide
with gaps

Safe Opening Times:

There have been a number of cases where a branch has received a new safe or new safe time over-locks. These safes are being set up as per the standard instructions for longer opening hours of PO Local/ Mains. The times are set when the safe or time-lock are installed and are done on an individual basis (these times can only be changed by the safe servicers/ installers).

It is important you find out the safe opening times so you can advise the Operator accordingly on their opening/closing preparation procedure for each morning/evening.

The opening times have been set for about 30 minutes before the shop opens, then it time-locked at the shop opening time until about 09.00, it can then be opened until 17.00, then time locks again until the shop closes

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at which point they have another window of around 30 minutes to close up.

I.e. Shop opens 06.00 (6am) and closed 20.00 (8pm):

- Safe can be opened for 30 minutes from 05.30.
- Safe is time-locked closed at 06.00 until 09.00
- Safe can be opened from 09.00 until 17.00
- Safe is time-locked closed 17.00 until 20.00
- Safe can be unlocked at 20.00 until 20.30.
- Safe can not be opened 20.30 until 05.30 the following morning.

Often, the hours that the branch will be open may vary during the first few weeks as we may be expected to follow the old office hours & this will mean that the new Operator must be aware of how to open the safe and load their Bidi safe, whilst on their own from the first day (as it will have to happen before 06.00 (6am) and we will not be there that early).

Leaving a note with the Operator, listing everything they have to take out of the main safe is good practice.

If the Operator forgets or has issues and misses the opening time of their main safe in the morning, they can follow the security guidelines and filled/refilled the Bidi-Safe so long as they close and lock the door/s to the premises with no customers present while this is done.

COMPLIANCE

The Operator is responsible for ensuring all existing and future members of staff serving at the Post Office Local have completed the **Post Office Foundation** online test along with any future compliance tests which will be sent directly to the branch. This activity must be confirmed as completed prior to your attendance at the branch to begin onsite training support. None completion should be feedback to the FCA & via the feedback forms to Sue Richardson.

ASSISTANTS

Registering

All the assistants should have been registered with HR prior to the office going live; you should confirm that this is the case and supply P250 forms etc if this hasn't been done. Please take one spare set of forms to leave with the Operator, for registering new assistants (P250 held on EASE) and stress the importance to the Operator

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of filling these in; stressing that new assistants' should be registered before they work in the Post Office. The Operator should contact the HR centre when they employ new people who are going to work on the HOL system, to request up to date forms (usually 2 weeks in advance of them beginning work).

TRANSACTIONS AND STOCK

PO Local branches offer limited transactions and stock items. The FCA responsible for opening the branch will be happy to speak to you sometime in the week before the set-up day and you should take the time to you aware of any additional "Bolt-on" transactions (eg. Local Collect, Bureau de Change or Mvl's). Feel free to give them a call. Please be aware that the bolt on transactions will vary from branch to branch. The complete list of transactions for Post Office Local is in the PO Local File held on EASE and you should leave a copy of this onsite. The only Special Stamps that will be received as stock will be the Christmas Issue. If the Special stamp icons are unavailable, these items should be booked in and sold as ordinary stamps, You will need to be aware that some of these branches may previously have been SPSO's and did a full range of transactions, there will be publicity available to make the public aware of the difference of the new offer. Please read the handout '**Objection Handling**' and leave this with the Agent to cascade to his assistants. *Pens, Paperclips, staplers, etc are provided by the Operator and are not included in the stores pack.*

POCA

PO Local branches **hold all POCA forms**. These branches only issue Vault Cards and complete automated transactions. A customer asking for POCA form should be handed the appropriate form, but for the customer to have the form processed, they should be directed to the nearest Post Office branch that isn't a PO Local.

Restrictions Policy

Print the latest version of the **Restrictions Policy** from EASE (print the Power Point slides) and discuss with the Operator and their staff. Make them clearly aware that this is a contractual matter and there should be a copy of the Post Office® Paystation Manual in every branch & information available on HOL Help. Should the Operator feel they want to discuss this in more detail with someone or they feel that they have a legitimate right to operate a different terminal in preference to the **Post**

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Office® Paystation, you must advise the Operator to contact the NBSC for clarification as a priority.

Bureau de Change - BUY BACK

The PO Local model has the standard Pre-Order Bureau de Change transaction as part of their offer. Training should be given on all aspects of this transaction especially the buy back arrangements.

- CViT will take currency pouches using normal remittance procedures; currencies should be returned with the next collection if POL funded.

PO Local branches DO NOT buy back any Travellers Cheques

POPOS - leaflet list

The only leaflets held in PO local branches at this time are:

(4th November 2011) (Order Numbers Updated 28/4/12)

PL5592 - Welcome Leaflets

PL6797 - Guide to customer services leaflets - English

PL6798 - Guide to customer services leaflets - Bilingual*

RMOS1 - Royal Mail Our Services Leaflet - English

RMOS2 - Royal Mail Our Services Leaflet - Welsh*

RMOP1 - Royal Mail Our Prices Leaflet - English

RMOP2 - Royal Mail Our Prices Leaflet Welsh*

*The Welsh & bilingual leaflets are for offices in Wales only.

Issues During Training:

If an FSA experiences any problems with the Operator or their staff during the training period which impacts on the training being undertaken, please flag in the first instance to your team leader. The issue should then be flagged to the FCA who will liaise with the Operator and raise further with their RNM if appropriate.

Level 1 Feedback Form (Mandatory)

The Field Advisor should leave a standard Level 1 form with the Operator.

Other Feedback

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Feedback is an important part of keeping our processes fit for purpose. If you have issues or improvement suggestions, you need to make them known either via your Line Manager or to Sandra McBride (EASE). Keeping our process current is very important, as this project is vital to the future of our business and your skill and knowledge makes a contribution to the whole team so don't miss that opportunity to contribute to improvements.

Induction Day Feedback

From October 2012 **there is no Induction Day Feedback.**
Please **do not** handout or send induction day feedback.

Site Feedback for the Stakeholder

If you have experienced difficulties or had issues and you have solutions or want to share your experiences please fill in the attached **Feedback form** and forward it to your Line Manager who will collate any feedback before forwarding it on to steve.z.fox GRO



Feedback Form Aug
2012