

Release 1

Training Needs Analysis

1 Document Administration

Date of this revision

- 29th April 2016

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Approvers and Reviewers

This document requires input from the following stakeholders, who are required to review and/or approve the document, as listed:

| Name | Title | Reviewer | Approver |
|-----------------------|--|----------|----------|
| Shaun Turner | Business Readiness Lead – Release 1 | Y | N |
| Dawn Brooks | Business Readiness Lead – Release 1 | Y | N |
| Neil Haydock | Business Readiness Lead – Release 1 | Y | N |
| Angela James | Business Readiness Lead - Network | Y | N |
| Paul Garnham | Business Readiness Lead – Network | Y | N |
| Gayle Peacock | Head of Branch and Customer Support | Y | N |
| Andrea Horner | Business Readiness Lead - BTTP | Y | Y |
| Marc Reardon | Release 1 Manager | N | Y |
| Jackie Newton | Post Office Sales & Customer Services Training Manager | Y | Y |
| Sarah Malone | Head of Learning and Development | N | Y |
| Kevin Seller | General Manager of Network and Transformation | N | Y |
| Angela Van Den Bogerd | Director of Support Services | N | Y |

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| 1. | | | | | |

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3 Introduction

3.1 Executive Summary / High Level overview

NOTE: This section may evolve as the document is developed, and will be finalised for v0.3

Post Office is undertaking a major transformation of its systems, hardware and networks. Release 1 forms part of the broader Branch Technology Transformation Programme (BTTP), and is focused on the following functionality:

- Screen Share
- Enhanced Online Help
- Enhanced Branch Messaging
- Enhanced User Management
- Simplified Transaction Journeys
- Enhanced AML ID Capture
- Improved Speed to Market

This Training Needs Analysis (TNA) is focused on supporting the successful implementation of Release 1. There are critical interdependencies with the other programmes, both within the BTTP and the broader transformation landscape. However, training needs, delivery and co-ordination of anything outside of the Release 1 solution is not in scope.

This document does not provide detailed information regarding specific content of training materials, deployment plans or timelines, which will be covered in the Training Strategy Document, to be developed at a later date.

3.2 Training Needs Analysis Summary

NOTE: This section may evolve as the document is developed, and will be finalised for v0.3

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

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

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

A programme of communications will need to support the training programme to ready those who will need training, and to provide context and updates for those who will be affected by implementation or any changes. This TNA document will highlight which areas fall under the scope of "Training", and which fall more comfortably into Communications.

The TNA document identifies the audiences, and a draft high-level solution for training delivery and evaluation. It also identifies any risks, challenges and issues specific to this Release and their associated mitigation strategies.

In addition to ensuring the effective training of existing colleagues, the Training team is also responsible for ensuring all BAU materials

3.3 Training Scope

NOTE: This section may evolve as the document is developed, and will be finalised for v0.3

What's In / What's Out

- Training material will focus on training changes to the current system processes and presentation where these changes are introduced. Training provided to existing colleagues is not designed to be a solution for new entrant training.
- Updates to new entrant training will be managed as part of the training team responsibilities and will be addressed in this document
- Training in the fully technologically integrated end to end process e.g. system integration with PO clients and other PO systems is out of scope.
- Colleagues will be trained so they can use the system to perform their roles on day 1 of go-live and have access to material to support this usage.

Who

The training will focus on training:

- current active users of Horizon i.e. those who have completed business as usual product and system training and are already in branch
- colleagues providing support and training to current users of Horizon (such as NBSC advisors or Field Support Advisors)
- other colleagues affected by process changes, resulting from work packages included in this Release

How

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

- A drive to greater use of eLearning.
- A recognition of the continued need for workbooks to meet the needs of different learning styles
- An intention to make training available to all agency colleagues as well as postmasters (though postmasters will still be responsible for ensuring that their staff are trained appropriately).

3.4 Risks

NOTE: A number of risks have been identified through the development of Training Needs Briefs. These risks will be discussed as part of the information gathering process for this document and will be finalised for v0.3.

Key for Impact: H – High, M- Medium, L- Low

| Risks | Mitigating Actions | Impact |
|---|---|--------|
| <p>There is a risk that a lot of branches will be experiencing a lot of change over a short period time because BTTP is a large programme - hardware, network and software are all changing.</p> <p>The consequence is that every release will involve all active users learning something new in a short space of time.</p> | <p>The training solution needs to consider the impact all the changes are having on active users, ensuring the language used and the message is positive and the benefits are being sold.</p> | M |
| <p>There is a risk that Simpler to Run Network (STRN) will impact the content and timelines for BTTP, including Release 1.</p> <p>The consequence of this is that Release 1 content could potentially change dramatically, be cancelled or be pushed back.</p> | <p>The training team needs to be aligned with STRN to gain an understanding of how STRN outcomes might affect Release 1 content, so that we are aware at the earliest possible time.</p> | H |
| <p>There is a risk that End User Computing (EUC) rollout will coincide with the expected rollout of Release 1.</p> <p>The consequence of this is that learners will have to learn using new hardware and have less support, for example Help systems, which are part of Release 1.</p> | <p>The training team needs to remain aligned with the EUC branch of BTTP and consider alternative support for learners.</p> | M |
| <p>There is a risk that due to Post Office being unable to verify with any degree of certainty how many branch colleagues work in the agency network or who they are, there could be far more learners than has been estimated.</p> <p>The consequence is that we don't have an accurate understanding of how many people we need to train.</p> | <p>The training team needs to ensure the training solution is robust enough to handle more users than the estimated figures.</p> | M |

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

| Risks | Mitigating Actions | Impact |
|--|--|--------|
| There is a risk because at this stage the details of how Computacenter engineers, Northern Ireland branch colleagues and all BFPO user ID's will be processed has not been defined. The consequence is that the training outcomes defined in this TNB may not be suitable and further training will have to be developed to cover these populations. | The training needs should assume that IT Support engineers, Northern Ireland branch colleagues and BFPO personnel will be treated differently. The training team must work closely with BTTP to update and revise the training needs for IT Support engineers and BFPO and update training needs as the process design is developed. | M |
| There is a risk that branch users will be reluctant to allow the use of Screen Share in the light of 'Sparrow'. The consequence of this is that the enhancement to the branch support will not be fully utilised. | The training and communication must sell the benefits of the new Screen Share system and reassure branch users that NBSC advisors can only view the PoS system, they will not be able to complete any system transactions or affect the branch balance. | M |
| There is a risk that NBSC advisors will use the Screen Share function too often. The consequence of this is that the average call handling times will increase. | The training team should benchmark with other organisations how Screen Share has been used effectively, lessons learned and best practice and use this to develop the behavioural training session for NBSC advisors. | L |
| There is a risk that the system enhancement to product journeys could be complex. The consequence is that the estimated times for training development and delivery could be insufficient and impact the implementation of the change. | Training team to work closely with the programme throughout the development cycles so that changes to the estimated training effort can be revised as soon as they are identified. | L |
| There is a risk that the new Help system does not live up to expectations such as the content not being up to date. The consequence is that users will quickly go back to ringing NBSC for the answers | BTTP must ensure that the Help content is updated ready for go-live. The training and communications must sell the benefits of the new system and make system users want to find the answers on the help system before ringing NBSC | L |

3.5 Design Principles

To maintain a common approach across the organisation as a whole, training will be developed in line with the general design principles used across the broader Post Office L&D function. This will ensure a consistent presentation and set up systems to support further deployment of training across the broader Branch Technology Transformation Programme.

1. Training material, including existing training materials which will require updating, will accurately reflect the new EUC kit as much as possible

2. Training will be delivered in 'bite-size' modules. This will allow for completion over a period of time and in parallel with operational requirements
3. Training material is made available a minimum of 4 weeks prior to go-live for end users to complete their training in good time
4. Any training material will be easy to access and repeatable. This will support an end user's need to repeat modules and reinforce learning
5. Training will be designed once
6. Classroom training will be kept to a minimum and reserved for the most complex needs and
7. The look and feel of all training material will be in line with Post Office corporate branding
8. Training completion will be tracked and evaluated for effectiveness
9. Training will be role-based and will follow an 80 / 20 rule. Training material will prioritise its focus on what an end user needs to know to do their job (i.e. 20% of the things they need to know to do 80% of their job)
10. Post Office colleagues will be involved in the design and / or review of training materials
11. Training will be positive and current, supporting communications and helping colleagues feel confident about the associated benefits of the change

3.6 Training Objectives

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

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

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

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

3.7 What good looks like

- Training will have minimal impact on time away from counter, service or operational delivery
- Postmasters and branch managers will be trained to a level where they are able to support their colleagues
- Support colleagues will be trained to a level where they are able to continue to deliver their current role
- The in-branch Migration Support Managers (role details to be confirmed) will be trained to a level of competence where they are able to effectively support postmasters and branch colleagues, and complete any additional duties required of this role
- External suppliers will be trained to a level where they are able to fulfil their responsibilities, with minimal impact on Post Office staff, customers or operational delivery
- All colleagues undergoing training will be able to prove their competence by conducting a test / knowledge check
- From a colleague perspective, the training will feel aligned and integrated with the communications and support which has also been made available

4 Lessons Learned

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

Summary of Findings

| | What? | Why? | Learnt from... |
|--------------------------------------|---|---|---|
| Training Material Development | Keep it simple and with clear step by step instructions. | To allow for the very broad user base with differing IT skill set. | Success of the compliance training is seen as down to simple instructions and layout. |
| | e-Learning: Develop for different operating systems / devices / releases, e.g. iOS / Android / Windows 7 / Windows 10. Allow the flexibility to incorporate new/future releases. | To avoid problems accessing e-learning, and users getting error messages that detract from the learning experience | Online Product Training deployment (lots of IT related help calls before training can be accessed). |
| | Develop in bite-sized chunks. E-Learning should have the ability to pause and resume. | Supports business operations, e.g. able to train and pause while serving customers. | Horizon Next Generation (HNG) User Feedback |
| | Build understanding around the associated benefits for the system change. | Increases colleague buy-in and training uptake. | Online Product Training |
| | A mixture of training methods and materials are beneficial to support training. Help for a user that is at their fingertips and easy to access and reference is very important when serving customers. | Workbooks have been very effective for both users without e-learning access, and those uncomfortable with e-learning. Very much part of the culture of training and product updates at the Post Office today so would be expected by end users. | HNG deployment and new product updates are supported by workbooks and mixed training material. |

| | What? | Why? | Learnt from... |
|-----------------------------------|---|--|---|
| | Training must conform to the Disability Discrimination Act and be accessible in all appropriate formats. | So it can be accessed by all users. | All training material confirms to the principles of the DDA |
| | Develop training modules that are specific to each branch-type i.e. content specific to the products and services sold in the different branch types, such as Main and Local. | To help colleagues identify the training that is relevant for them. | Online Product Training |
| | Thorough checking and testing of all material is vital before it is released for use. | Avoids the situation where training material does not reflect reality. | HNG User Feedback |
| | Use modern user experience / images in the material to reflect user expectations for current/ modern training design. | By using engaging designs we may increase colleague buy-in and training completion rates. | Online Product Training |
| Training Deployment | Consider deploying to Crown branches first. | For quick wins and quick lessons learned. | E-Learning |
| Training Material Delivery | Training material should be available all the time – whether hard copy, soft copy or e-learning. E-learning should be available not just from office locations / Post Office devices. | Avoid impacting customer service and working hours. Colleagues can train at their own speed and time on a device that is familiar to them. Encourages culture change regarding e-learning. | Online Product Training HNG – During the deployment 6370 out of 11700 branches accessed e-learning, with 15,366 colleagues creating an account. There were also 865 registered back-office users i.e. non branch colleagues. |
| | Provide training material that can be accessed on slow / limited internet connections. | Enables everyone to benefit from e-learning and doesn't leave some colleagues in rural locations feeling frustrated / abandoned. | HNG User Feedback |
| | Include active user engagement, navigation and FAQs in the material. For E-learning include Show me, Help me, Let me scenarios | To encourage confidence and prove ability. | HNG User Feedback |

| | What? | Why? | Learnt from... |
|--|--|---|---|
| | Early engagement with Multiple agencies to agree any firewall changes that might be required to allow colleagues to access Post Office learning through the one store computer. | To avoid delays in the training of Multiples agencies colleagues. | Compliance Training |
| | Training may be given during weekly Worktime Learning (WTL) sessions for Crown and Multiples branches. | Would keep to branches allocated schedule and not disrupt time spent serving customers. | Used for communications, particularly for product changes. |
| Training Completion / assessment tracking | Track training at an individual level (colleagues per branch) -e.g. name/email to create unique log-on -use personal email addresses if Post Office ones not available | Gain a full picture of skill level per branch and per individual to increase confidence in ability to use the system. To assure readiness for go-live. | Network transformation tracks individual training completion, including Multiple agencies where end users have provided personal email addresses. |
| | Training progress monitoring before go live. | Gain a full picture of skill level and business readiness prior to go-live, to avoid heavy demand on go-live support resources. | HNG online deployment |

5 Release Specific Challenges and Activities

Under the original Front Office Application solution, IBM were responsible for delivering the programme training work stream in collaboration with the BTTP training team. Specifically, IBM were responsible for; providing resources for the design, development, testing and delivery of training modules and materials, the delivery of training to support service colleagues, the IT infrastructure to host and deliver ELearning and reporting on training completed. In the current Fujitsu solution, these training responsibilities now fall to Post Office.

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

5.1 Learning Management System (LMS)

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

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

5.1.1 Success Factors

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

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

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

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

5.1.2 Alternative Solution

If Release 1 is scheduled to be implemented before Success Factors, the release of any eLearning training will require us to consider alternative LMS platforms, such as Totara, which currently supports BAU eLearning, or the procurement of an external LMS specifically for this release. Any such procurement will require the team to develop a set of business requirements, in conjunction with the Learning Academy and business needs, to identify a suitable supplier. Any such solution will incur additional costs to the programme which will need to be factored into these decisions.

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

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

5.2 User Management and Reporting

Enhanced User Management is currently under consideration for implementation as part of Release 1. At present, there is no single means of identifying all colleagues who work within our branches, which present a significant challenge when delivering and reporting on widespread training across the Network.

Prior to the commencement of training for Release 1, the team will need to complete a significant amount of research to identify the number of colleagues in each branch, so that we are able to report and record training data to the best of our capacity. The completion rates of all training assessment activities will need to be compared against this data, to ensure that we can properly identify where training has not been successfully completed and ensure appropriate follow-up is completed.

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

5.3 Procurement

5.3.1 eLearning

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

5.3.2 Printing

There is a business requirement to print and distribute workbooks that mirror the training content available on any eLearning modules. The BTTP training team need to identify and procure the services of an external printer for Release 1 and all future releases. The high level printing requirements need to be documented. The internal communications team will assist with the identification and procurement of a suitable supplier.

5.3.3 Training Consultants

Some of the changes to the branch PoS system will also impact Support Centre colleagues. Where this involves significant behavioural change or technical elements, additional resources and expertise may be needed to develop this training and deliver it through a mix of face to face or train-the-trainer events. BTTP training need to procure the services of external training consultants to assist with this work and, specifically for Release 1, there may be a requirement for a training consultant with expertise in behavioural training to train NBSC advisors on the appropriate use of the new Screen Share functionality.

5.4 Training material setup

5.4.1 eLearning system design

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

5.4.2 Workbook templates

BTTP training must work with the eLearning supplier and printer to develop a workbook template that can mirror the eLearning training content. These must adhere to learning principles and brand

standards, and must be developed in advance of any content development. Once completed, these templates will be used throughout the remainder of future BTTP releases.

5.5 Ways of working

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

5.5.1 Training team ways of working

IBM were responsible for the development and delivery of all the training documentation including the Training Needs Analysis (TNA), Training Strategy and Training plans for BTTP. This responsibility now falls to the BTTP training team and additionally the team need to define how they will work with BTTP to deliver the training work packages. Specific deliverables are:

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

5.5.2 eLearning supplier ways of working

BTTP training team will be procuring the services of an eLearning supplier and as a result need to define and document the agreed ways of working. Where this involves engaging a new supplier, this should include:

- Processes and procedures for the design of the eLearning templates
- Processes and procedures for the development and delivery of training modules
- Indicative timelines for development and delivery of training content
- Indicative costings for development and delivery of training content to help inform decisions on training delivery method used.

5.5.3 Printing supplier ways of working

BTTP training team will be procuring the services of a printer and as a result need to define and document the agreed ways of working. This should include:

- Processes and procedures for getting training materials printed and distributed
- Indicative timelines for printing and delivering training materials
- Indicative costings for printing and distributing training materials

6 Audiences

NOTE: These tables have been drawn from an earlier document, and are used as an example only. Further research will be completed as part of the information gathering process. This section will evolve throughout the life of this document and will be finalised in v0.3

Front Office Managers – use the Horizon system to serve customers and balance

| Training Role | Audience Name | Number of staff in the audience |
|----------------------|--|---------------------------------|
| Front Office Manager | Crown Branch Managers | 321 |
| Front Office Manager | Agency Postmaster | 9200 |
| Front Office Manager | Agency - WH Smith | 109 branches |
| Front Office Manager | Agency - Multiples e.g. McColls, One Stop, Tesco etc. | 1909 branches |

Front Office Colleagues – use the Horizon system to serve customers

| Training Role | Audience Name | Number of staff in the audience |
|-------------------------|--|---------------------------------|
| Front Office Colleagues | Crown Colleagues | c3400 |
| Front Office Colleagues | Financial Services & Mortgage Colleagues | 280 |
| Front Office Colleagues | Agency Colleagues | circa 50,000 |

Support Functions – use the Horizon system in a support capacity but also review product and balancing transactions to help / provide support services to branch colleagues

| Training Role | Audience Name | Number of staff in the audience |
|-------------------------------|---------------------------------|---------------------------------|
| Support Function - Active Use | Network Business Support Centre | 70 |
| Support Function - Active Use | Finance Service Centre | 155 |
| Support Function - Active Use | Branch Standards | 30 |
| Support Function - Active Use | Mails Development Managers | c6 |
| Support Function - Active Use | Model Office | 2 |
| Support Function - Active Use | Supply Chain | 56 |

Support Functions - do not use the Horizon system as part of daily tasks, but may be affected by other changes to process

| Training Role | Audience Name | Number of staff in the audience |
|------------------------------|---------------------|---------------------------------|
| Support Function - Awareness | POEX | 32 |
| Support Function - Awareness | Complaints | 24 |
| Support Function - Awareness | Fraud Analysis Team | c20 |
| Support Function - Awareness | Managed Services | TBC |
| Support Function - Awareness | Product Managers | 90 |
| Support Function - Awareness | Business Change | c4 |
| Support Function - Awareness | Contract Managers | c10 |

7 Training Outcomes, Delivery and Evaluation

NOTE: The following tables will be provided for each work package (along with additional information) to provide an overview of identified changes and training needs; affected populations, and proposed training method. This information has been taken from the Training Needs Briefs for each package, and will be expanded upon during the information gathering process.

This section will also begin to identify potential methods of evaluating the effectiveness of training in line with Kirkpatrick principles. For some audiences/outcomes, this may require the identification of reports and may highlight new dependencies.

This section will evolve throughout the life of this document, and will be finalised in v0.3

EXAMPLE - Enhanced User Management

| Training Outcome | Detailed training content if known |
|---|---|
| New User ID process & reporting | <ul style="list-style-type: none"> • New process explained • Self-service - reset a password • Self-service - unlock a user ID • Reporting |
| Migration process for all existing users | <ul style="list-style-type: none"> • Process for new IDs and passwords explained |
| Submitting P250's electronically | <ul style="list-style-type: none"> • How to submit a P250 for all new users |
| HR - user administration | <ul style="list-style-type: none"> • Creation of a user ID with training access only • Creation of an initial user password • Processing of P250 • Assigning a role(s) to a user ID • Assigning access rights to a user ID • Reporting: Non-conformance on required training • Reporting: Compliance training completed • Restricting access rights on an existing user ID • Re-activation of archived users |
| NBSC - user administration | <ul style="list-style-type: none"> • Remote reset of a password • Remote unlock of a user ID |
| In branch - user management | <ul style="list-style-type: none"> • Add a user to the branch • Allocate a role to a user ID • Restrict transactions on a user ID |
| Security/ Audit investigation - reporting | <ul style="list-style-type: none"> • Reports available to support investigations showing user ID against transactions |
| Objection handling | <ul style="list-style-type: none"> • Objection handling principles • The benefits of the new process • What branch colleagues can do for themselves |
| Fujitsu: New User ID process & reporting | <ul style="list-style-type: none"> • New process explained • Self-service - reset a password • Self-service - unlock a user ID • Reporting |

| Training Outcome | Approx time in minutes | Training Audience | | | | | | | | | | | | | |
|---|------------------------|-------------------|------------|----------------------|----------------------------|-------|--------------|----------------------|------|------------------------|--------------------|----------------------|------------------|--------------|------------------|
| | | Branch Colleagues | Postmaster | Crown Branch Manager | Multiple Partners branches | BFPO^ | NI Branches* | Human Resources (HR) | NBSC | PO BAU Training (FSAs) | PO Security /Fraud | IT Support Engineers | All PO Employees | Floorwalkers | Fujitsu Services |
| New User ID process & reporting | 30 | X | X | X | X | | X | X | X | X | X | | X | X | |
| Migration process for all existing users | 5 | X | X | X | X | | X | X | X | X | X | | X | X | |
| Submitting P250's electronically | 5 | | X | | X | X | X | X | X | X | | | | X | |
| HR - user administration | 240 | | | | | | | X | | | | | | X | |
| NBSC – user administration | 30 | | | | | | | | X | | | | | X | |
| In branch - user management | 15 | | X | X | X | X | X | | X | X | X | | | X | |
| Security/ Audit investigation - reporting | 60 | | X | X | X | X | X | | X | X | X | | | X | |
| Objection Handling | 60 | | | | | | | X | X | X | | | | X | |
| Fujitsu: New User ID process & reporting | 60 | | | | | X | | | | | | X | | | X |

| Training Outcome | Training Delivery Method | | | | | | |
|---|--------------------------|------------------------------------|-------------|------------------------|-------------------|------------------------------------|-----------------|
| | E-Learning | Workbooks (based on e-learning) | User Guides | Face to Face/Classroom | Train The Trainer | Floorwalkers/Early Life Support | 'How to' Videos |
| New User ID process & reporting | X | X | | | | | |
| Migration process for all existing users | | | X | | | | |
| Submitting P250's electronically | X | X | | | | | |
| HR - user administration | | | X | X | | X | |
| NBSC - user administration | | | X | X | | X | |
| In branch - user management | X | X | | | | | |
| Security/ Audit investigation - reporting | | | X | X | | | |
| Objection Handling | | | X | X | | | |
| Fujitsu: New User ID process & reporting | | | X | X | X | | |

8 Business As Usual Impact

NOTE: Learning Materials have been identified as requiring updates as a result of the changes expected from Release 1. This section will identify these files, and the processes required to ensure they are updated in a timely fashion.

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

This information will be researched throughout the life of this document and will be finalised in v0.2

Introduction

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

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

8.1 Release 1 Overview

A total of 45 BAU Training material files have been identified as requiring amendments as a result of the changes caused by Release1. These files are varied in type and include word documents, excel spreadsheets, eLearning modules or videos. The complexity of change also varies in that it can range from changing one word in a document to a whole document needing rewriting. As a result timescales for making amendments could range from minor changes to around 8 weeks depending on the amount which needs changing, the type of document it is and the complexity of signoff required

It has been identified that changes to documents held on the EASE SharePoint can be amended by the Network support team and ELearning files will to be reviewed by the product owners

It is envisaged that Release 1 will cause no wide scale changes which will mean that changes to existing material can be communicated by means of memo updates, branch focus, and emails. However future releases may warrant Train the Trainer and potentially affect classroom training material.

8.1.1 EASE SharePoint

35 unique BAU files held in 65 different locations on the EASE SharePoint site have been identified as requiring changes due to Release 1. These are made up of word documents, excel spreadsheets, pdf documents and a link to the Post Office Horizon Online Help on the Intranet site.

The majority of these documents are to be reviewed by Sandra McBride, Network Change Support Advisor, unless it is an operation manual or workbook when it would need to be reviewed by the relevant product manager. The Horizon Online Help link is covered in 6.23 below.

8.1.2 E Learning

5 modules on Learning and Development E Learning site have been identified as being impacted by Release 1. They contain references to User Management and Mails Transaction journey paths.

8.1.3 HNG online

HNG online is held on the Post Office Intranet site and it is the one stop place to find branch operational information. It contains 7 links to various aspects of operational information for branches. There is historical information contained in Branch Focus Online, Branch Focus Online Archive and Weekly Activity and would not be changed. There is a Telephone List which contains useful telephone

numbers and will not be impacted by Release 1 or future releases. The remaining 3 links, Stock Codes, Compliance workbooks and Horizon Help are all impacted by Release 1 and would need major amendments made in each.

8.1.4 Compliance Workbooks

Compliance workbooks are accessed via the Post Office Intranet Homepage. 5 workbooks have been identified as being impacted by Release1. Review and signoff of these would be done by the Compliance Team

9 Dependencies

NOTE: Throughout the research for this document it is expected that a number of dependencies will be uncovered, which will be listed here.

This section will evolve throughout the development of this document, and will be finalised for v 0.3

10 Path to Training Strategy

NOTE: The Training team is required to provide the programme with a detailed Strategy and Plan as part of Business Readiness. Once the research for this TNA has been completed, we will be able to identify any information which is still required in order to create an effective Strategy and Plan.

In many cases, at this stage of the programme, this information does not yet exist - rollout timeframes, detailed confirmed changes, stable design etc.

This section will be finalised for v0.3

- What is missing?
- How do we get there?
- Next steps