# Electronic*memo*

**THE POST OFFICE**

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| From | Alan Bourne/POCL/POSTOFFICE |
| Date | 25/06/99 15:40 |
| Subject | Fwd: horizon qualitative research |

for your info - overview of Horizon qualitative research with staff and subpostmasters

cheers

Alan

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| To | Kathryn Cook/POCL/POSTOFFICE GRO GRO |
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| From | Alan Bourne/POCL/POSTOFFICE |
| Date | 25/06/99 15:38 |
| Subject | horizon qualitative research |

Dear Kathryn, Dave and Kjetil,

The following email outlines the key findings to emerge from the Horizon Live Trial qualitative research (17 depth interviews with staff and subpostmasters from the new 100 offices across a range of office types). The interviews explored views of the system, training and support, the overall change process and impact on ways of working.

Overall, perhaps the most significant observation to emerge was the keenness of all those interviewed to make Horizon work and their willingness to embrace the changes. People felt it was vital for future success and business generation, clearly showing they were highly committed towards it. Although many had niggles about a variety of specific issues they had encountered, it was largely against a positive background. The installation process in particular was generally felt to have gone very smoothly.

Specific issues which emerged post-installation were....

Ergonomics - a wide range of specifics were put forward by interviewees around kit reliability, software usability/design, workspace layout, screen size and bar code readers. A common comment which illustrates the attitudes associated with this was "it's designed for sub post offices, not ours" or vice versa, that is to say people tended to attribute areas they saw as lacking in design terms to the system being designed for a different type of office, rather than the system being generic in nature. On the plus side, people generally liked the system in relation to processing transactions.

Balancing procedure - many felt this was unnecessarily complex, and for many it was taking a considerable amount of time

(ie. working til late in the evening) compared to manual balancing; there were some encouraging signs, however, in that Horizon-based balancing times were reducing as experience and understanding grew.

Relationship with the Post Office - many felt they were working twice as hard for less revenue, and there was concern over impacts of this, either in terms of bonuses (eg. influenced by poor queueing times) or impact on remuneration. Further problems had occurred in Branch Offices due to simultaneous training of BO staff from all offices, making provision of cover for training release problematic.

Training - despite being generally perceived as too short, many liked it and thought trainers were good, although reported that they felt it didn't deliver the depth of understanding they would have liked and didn't prepare them for actual go-live. Further specifics included....

- training not adapted to mixed nature of the group, ie. accounting for IT experience, learning approaches (linked with age), attention span and stamina for learning, and current way of working (eg. not clearly identifying whether people used ECCO or manual working made transfer from the old approach difficult).

- classroom ergonomics - a projected "trainer screen" was put forward by several interviewees as a simple and useful improvement opportunity to enable all participants to see specific routines or problem-solving approaches.

- people often reported that although the technical training had been adequate, they often felt that the training had not prepared them for using the system "in the real world", particularly as issues around the increased service times and changes in how to provide customer service while using the system were not addressed.

- some elements of the training programme's content (balancing in particular) were felt to be unrealistic, resulting in attempting to problems and considerable stress when people found the system not working as they anticipated in their offices.

- speed of knowledge transfer and consolidation was clearly slower for part-timers once back in the office.

Support - helplines were perceived as good in terms of interpersonal interaction, but were unable to provide an operationally viable service. Users repeatedly voiced that they needed help "there and then" to solve operational queries, but often had to wait for helpline to call back, and then often found either knowledge was lacking as "helpline are learning too" or help was simplistic and they could have done it themselves. HFSOs were generally perceived as useful, many feeling that they were essential in the early days of live operation. Commonly HFSOs tended to do the balance rather than coach office managers through it, given the pressure to get the task completed. Once HFSOs had moved on, outlet managers often reported being back to square one.

Approaches to solving operational queries - a wide range of approaches were employed to solve queries, outlined below...

Discussion within the team / knowledge sharing - generally worked well where the team was younger and there was some IT experience within the team. Supportiveness within a team was also important - groups sizes of 5/6 seemed to be optimal. This was more difficult where queue pressure was high and through-put of customers on an hour-by-hour basis proved difficult to predict (eg. in branch offices).

One-to-one with local expert - this clearly worked best where someone in an office had adapted quickly to the system and could solve problems effectively. There was also a fair degree of networking (and emotional support) between subpostmasters and between branch office managers (but not between BOs and subs).

Trial and error by user - this tended to happen when there was a lack of other support, and/or due to anxiety under pressure. Given some knowledge this was reported as working reasonably well, and if successful can help build greater confidence quickly, eg. a number of subpostmasters felt confident enough to do their 3rd balance unsupported even if they made some mistakes. It was felt this would be a useful learning opportunity for the future.

Helpline - good as a sounding board, but as already mentioned, limited in ability to react in real time to operational need. It was also perceived as over-bureaucratic and complex, with knowledge of helpdesk staff currently insufficient. Several managers reported feeling the helpline was more useful to the PO installation team than to front-line Horizon users.

HFSOs - if available at the right time, support was seen as very good and given the HFSO came across as credible and knew what they were doing, was a good confidence-builder. Pressure to get tasks done (eg. balancing) tended to get in the

way of helping users become independent and work effectively without support.

User guides - these were seen as useful as a quick reminder of the processes to follow, but not helpful if anything doesn't work. Seemed to work best where people added their own methods or otherwise tailored them for their specific needs.

Manuals - where people had the time, these were useful for working through admin procedures, however it came across that they were too unwieldy and not designed around their operational purpose. It was suggested that a fault-fixer in the guide, for example outlining "if X happens, try Y and Z, if that doesn't work ring the helpline" would have been more practically useful.

Considering the outline above which emerged from the interviews, there are clearly a number of over-arching implications for management of change. The generally positive attitude which came across indicates that there isn't any obvious resistance to change amongst the new 100 offices and they are prepared to tolerate short term frustration in the hope of long term business gain. More widely, however, many expressed the enormous impact that Horizon would have on the culture of the organisation and potentially on perceptions of the PO as held by the community they serve. To a degree the Post Office may be largely trading on this goodwill to enable implementation, and many felt this should be recognised in a more positive and tangible way. The extent to which this is forthcoming will clearly have implications for acceptance or resistance to other changes in the future. In terms of enabling rapid transition from go-live to an effective way of working, areas requiring specific attention are:

- system ergonomics
- training
- approach to resolving operational queries and facilitating both confidence and learning
- review written support materials
- advice to counter clerks on managing impact on customers
- spread awareness of impacts of change and how they can be managed.

POSSIBLE SOLUTIONS

1) Ergonomics - requirement for processes to quickly feed back design (software and hardware) problems for future improvements to system (currently part of BSM approach).

2) Training

- ensure balancing is effectively and realistically covered in training.
- encourage individuals to solve queries within an office
- stream delegates on the basis of IT previous experience, age and experience of PO systems (eg ECCO or manual)
- tailor course elements further to suit delegate groups
- involve feedback from HFSOs and users in course design
- avoid "dumbing-down" of course if delegates are already IT-literate
- provide advice on managing customer service whilst getting used to the system
- ensure all HFSOs and all job aids (user guides etc) clearly reinforce training
- ensure likely implications of changes for "settling-in period" after go live are made clear, with a clear approach to managing expectations
- review training to ensure it focuses on vital few outcomes for effective operation at go-live

3) Helplines and resolving queries. Many offices solve problems without the helpline, meaning problem management information may already be missing much useful data, and often it can't respond quickly enough for operational need. Given this, a possible (and inexpensive) solution would be.....

a) Provide a short "question and answer" guide for basic resolution of common queries. For instance, "if X happens, try this, then reboot, if still a problem call helpline", thus reducing demand on helpline and facilitating learning and confidence in users to work effectively.

b) Offices to provide weekly feedback report (eg, along with cash account?) of main queries/issues that occurred to BSM for analysis alongside helpline call data, for instance for an agreed period after go-live. Additionally, putting forward effective solutions could be incentivised (eg. reward for most useful idea/method of the month) and best practice fed back to all offices in a Horizon publication.

c) At the training stage, encourage development of formal and informal between-office networks and group problem-solving

as appropriate to ensure a range of support is available.

4) Review written material - use helpline feedback to tailor user guides to office type, ensure manuals are more clearly indexed and formatting is reviewed to enable greater usability.

5) Provide advice on maintaining effective customer service whilst getting used to the system, both in training and for HFSOs and outlet managers to pass on to clerks.

6) Change management approach - ensure the human side of change is assessed in the broader context, including the cost of taking action and not doing so. Spread awareness of impact of changes on way of working after go-live.

Hope the above provides a useful summary of the key points to emerge from this stage of research.

Kind regards,

Alan