Branch Assurance Advisor – Induction & Training

Version 4.0

Branch Assurance Advisor – Induction & Training Programme

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V4.0	Confidential	Branch Assurance Advisor Induction Plan	Mehl Singh	19 April 2023	Review December 2023

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1. Objectives

The objectives of this Induction and Training Programme is to introduce new colleagues to the responsibilities, processes and daily requirements of the role of BAA. The primary requirement of the role being to check and verify the accuracy of branch accounting records relating to stock, cash, currency and compliance controls.

Secondly to support the postmaster in carrying out an effective branch assurance visit and other activities that assure that the integrity of cash and stock in the Post Office network is maintained.

2. Pre-Start Preparation

Prior to the new starter the following needs to be arranged:

- Laptop, with log on and email address
- Note Counter
- Printer
- Mobile phone

The line manager shall then assess at which entry point of the following training shall the new colleague commence:

1. No previous Post Office experience
2. Former/Current employee with no recent counter experience (within 12 months)
3. Former/Current employee with recent counter experience
4. Employee with current counter experience

- Colleagues that fall into group 1 to complete Post Office Discovery Day event on Success Factors.
- Colleagues that fall in either group 1 or 2 shall complete the High-Level Main/DMB Learner Journey, Investigating Discrepancies including the ATM, Lottery and Balancing eLearning. (Check with Christine Moore)
- Colleagues that fall in group 3 or 4 shall be asked to demonstrate their knowledge of transactions and selected eLearning will be scheduled. (Same as point 2)
- All colleagues shall complete the Effective Writing module on Success Factors
- All colleagues shall complete the Influencing, Assertiveness and Negotiation module on Success Factors
- All colleagues shall complete the Giving & Receiving Feedback module on Success Factors
- All colleagues shall complete the Personal Resilience module on Success Factors
- All colleagues shall complete the Taking Control of the Customer Conversation module on Success Factors

The availability of these courses and eLearning will be scheduled throughout the Induction period.

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3. Week One

During week one the line manager of the new colleague(s) shall ensure that orders are raised for the following items:

- Laptop, with log on and email address
- Mobile phone
- Home printer
- Note counter
- ID Security Pass
- Vehicle JNC or Private/Hire
- Introduction call with Branch Assurance Manager

Once the log-on, email and phone number have been generated arrange access to or create:

- Knowledge Centre – Central portal for housing information such as workaids, chapters, and admin tools relevant to your role
- Branch Assurance Work Plan – Schedule of activities
- Branch Insight Tool – Central portal housing data – used by field teams.
- Branch Assurance Portal - Central portal housing data – used by field teams.
- Branch Hub
- Puzzel Agent – Make and record telephone conversations
- Assure Expenses
- Microsoft Dynamics 365
- Global User ID
- Microsoft Teams
- Global User ID
- Smart ID
- SuccessFactors Inc e learning and compliance tests

4. Week Two

- Colleagues to be assigned and meet with a mentor from the existing BAA team.
- BA standards and POL Ways of Working including Service Mindset Culture (Hub) Impact of the GLO (Hub).
- Relevant overview of the 12 postmaster policies – including the Network Monitoring and BA Policy (Hub).
- Introduction with relevant stakeholders including Contracts Advisors and Casework Team.
- Process Map (KC)

5. Week Three

Meet with their mentor to set up their equipment and familiarise themselves with the available Databases and information sources, creating short-cuts and preparing their laptops for the role.

Shadow mentor on all types of activities. (As per delegation from Team Leader).

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6. Week Four

All colleagues, having demonstrated their ability to navigate around horizon during weeks two and three, should now have been issued with their equipment.

At this point, with their mentor, they should familiarise themselves with the BART, CAT, BIT and BAP, PUZZLE tools, preparing them for a BAV and SUPPORT VISIT/CALL. Print hard copies of materials required at BAV's and familiarise themselves with the call scripts utilised either over the phone or face to face.

7. Week Five

New colleagues shall attend all types of BAV's in a support role, including risk-based visit, closure, R&B, support visit and support calls.

Initially, the working papers shall be passed to the new colleague and, with their mentor they shall prepare duplicate, not for submission, BART and CAT tools.

8. Ongoing

Regular face to face meetings shall continue with their mentor. Team Leader shall provide ongoing support and produce a development plan and discuss during 121's.

9. Responsibilities

It is the responsibility of the BA manager and Team Leader to ensure that the induction of a BAA takes place and accurate records of each activity completed are kept, maintained and stored centrally on SharePoint. They will also be responsible for any training needs that are identified, and steps are taken to close these training gaps and to support the ongoing development of the BAA.

10. Version control

Date	Version	Updated by	Change
1/9/2021	0.1	David Nolan	Draft version
2/9/2021	0.2	Alison Clark	Revised version
3/9/2021	0.3	Alison Clark	Revised version
30/1/2023	0.4	Mehl Singh	Revised version
27/02/2023	3.1	Mehl Singh	Job title changes Review of courses Review of policy
19/4/2023	4.0	David Nolan	Reformatted

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a) Appendix

Include a copy of the training plan capturing that all areas have been covered (as well as ongoing training).

Name	
Date started	

Pre-start Checks		
Action	Date Complete	Comments
Laptop, with log on and email address		
Mobile Phone		
Home Printer		
Note Counter		
ID Security Pass		
Vehicle JNC or Private/Hire		
Introduction call with Branch Assurance Manager		

Day One		
Action	Date Complete	Comments
Knowledge Centre		
Branch Assurance Workplan		
Branch Insight Tool		
Branch Assurance Portal		
Branch Hub		
Puzzel Agent		
Assure Expenses		
Cost centre code (116284)		
Microsoft Dynamics 365		

Week One		
Action	Date Complete	Comments
Access to People Hub		
Microsoft Teams		
Global User ID		
Smart ID		
SucessFactors including eLearning and Compliance tests		
End of Week Review		

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Week Two		
Action	Date Complete	Comments
Assess Entry Point Schedule training:		
End of Week Review		

Other team contact		
Action	Date Complete	Comments
Meet Your Mentor		
BA Standards & Ways of Working		
Overview of 12 Postmaster Policies		
Introduction with relevant Stakeholders, CA's and Casework teams		
Process Map		
Controls		

Weeks Three and Four		
Action	Date Complete	Comments
Shadow Mentor on all types of activities		

Ongoing		
Action	Date Complete	Comments
To be determined with Team Leader		

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