

Postmaster Account Support Team Call Scripts

Script 01 – Calling to support with negative discrepancies

Call Overview

This script is for outbound calls to postmasters who have settled a negative discrepancy (or several discrepancies that result in a negative amount) at Branch Trading.

The aim is to discuss with the postmaster the reason for the discrepancy amount and understand if they'd like us to help them investigate it.

Preparation

- Check MS Dynamics for any notes on any calls in or out relating to a discrepancy amount. If so, then acknowledge this at the beginning of your call, i.e. "I've noticed that you called into Branch Support".
- Check if there has already been either a dispute registered or a resolution given/amount blocked – if so, you can advise the postmaster that we can see that has happened and that we won't send a letter about that amount.
- Check if the amount is because of a Branch Assurance Visit – do not call the postmaster until you have viewed the details. The situation may be being dealt with the Branch Assurance Advisor or another team.
- Check the account history and any notes that you hold.
- Note the postmaster's name and details. Are they an absentee?

Call structure

Greeting

"Hello, this is xxnamexx, from the Postmaster Account Support team in Chesterfield. Could I speak to the postmaster, Mr/Mrs/Miss xxnamexx, please?"

If the postmaster is busy, offer to wait, and if not practical, ask that they call you back.

Introduce yourself again, once passed through to the postmaster*.

"Could you confirm the name on your branch account for me, please?"

If the name doesn't match what you have, then query it politely.

"That's great, Mr xxnamexx. I'd just like to let you know that this call is being recorded for training and compliance purposes."

**If the postmaster is not available, you can ask to speak to the person in charge (PIC). Please ensure you get that person's full name.*

Introduction

"I'm calling about some amounts that have /an amount that has recently been settled to Review or Dispute in your branch".

Postmaster Account Support Team Call Scripts

Script 01 – Calling to support with negative discrepancies

Give details of amounts and dates.

"Are you aware of these/this, Mr xxnamexx?"

We want to make the postmaster aware so if they were previously not aware, we should give as much detail as we can.

If the postmaster is not present and you are speaking to the person in charge:

"Have you made the postmaster (Mr xxnamexx) aware of these discrepancies?"

If they haven't:

"OK, that's fine, but do you plan to let Mr xxnamexx know?"

If, yes, please ask when they plan to tell the postmaster.

If they say no:

"We'd prefer to keep the postmaster in the loop, but don't worry, we'll let them know for you. What is the best way to contact them?"

Try to obtain an email address and a telephone number.

Main Conversation

We need to find out if the postmaster/person in charge is aware of the reasons for the discrepancies.

"Do you understand the reasons for this/these discrepancy/ies, Mr xxnamexx?"

1. If they need more information:

Talk through their account entries with them, giving as much information and detail as you can.

Go to 2, 3 or 4 below, if applicable.

2. If they understand the reason for the discrepancy:

"I'm glad you understand what happened here, Mr xxnamexx. We just wanted to make sure that you were aware, comfortable with the reason for the discrepancy and offer our support if not.

What will happen next is that we'll send you a letter with a statement next week so you can see it all for yourself. Give us a call back if you have any questions when you receive it."

Postmaster Account Support Team Call Scripts

Script 01 – Calling to support with negative discrepancies

3. If they ask to arrange payment:

"It's great that you want to pay us, Mr xxnamexx, but that's not the reason for this call. We just wanted to have a chat with you about your account.

We'd much rather you had the chance to review the letter before you pay the discrepancy we talked about today.

Shall I give you a call back next week? When is good for you?"

If yes, take the best contact details to call back on.

If no, explain that the letter will contain information on ways to pay, and the number for them to call back on – give our opening hours.

4. If they do not know how/why the discrepancy happened:

"I'm sorry to hear that, Mr xxnamexx, but we can help you understand the likely reason for this discrepancy, so if you'd like us to investigate that for you, we're happy to do so. What do you think?"

If yes, explain next steps and advise the discrepancy amount will be blocked during the investigation.

If no,

"Ok, Mr xxnamexx, we just wanted to make sure that you were aware of the discrepancy and offer our support.

What will happen next is that we'll send you a letter with a statement next week so you can see it all for yourself. Give us a call back if you have any questions when you receive it."

Ending

Confirm any actions you have agreed, such as:

- Payment.
- Blocks added.
- Call-backs arranged.
- Investigation next steps.
- Agreement that they will dispute.

"Can I just check that we have the best contact details for you, please?"

Note any changes or additional contact details.

Postmaster Account Support Team Call Scripts

Script 01 – Calling to support with negative discrepancies

“It was good to speak to you today, Mr xxnamexx. Please get in touch again if there is anything else we can do for you. [A support advisor will be in touch/ I’ll speak to you next week/ The TC Disputes team will be in touch*]”

*if applicable

What if...

The postmaster *insists* on making a payment on this call?

This call is not about taking payments, but sometimes a postmaster may be insistent that he doesn’t want to wait for the letter, or have you call him back. In that case, if the postmaster can give you a convincing explanation and reason for the discrepancy, and you feel confident that they are clear on how it happened, follow up by saying:

“We would rather wait for you to receive the letter, Mr xxnamexx, but if you are totally happy from your own investigations that you should pay this discrepancy, then let’s sort that out for you now.”

The postmaster asks to dispute the discrepancy?

Assure them that they can do so, and that this process will begin with an investigation, at the end of which they can review the findings and decide whether to dispute them.

If the discrepancy relates to a TC, explain the TC dispute process, and arrange for the TC Dispute team to call them back.

Postmaster Account Support Team Call Scripts

Script 01 – Calling to support with negative discrepancies

Version Control

Date	Version	Updated by	Change Details
27th August 2020	0.1	Jo Milton	Initial draft
7th October 2020	0.2	Jo Milton	Updated draft version for use
20th May 2021	1.0	Jo Milton	Removed draft status No content update
26 th July 2024	1.1	Simon Worboys	Removed any mention of 'Settled Centrally' and – where applicable – replaced with Review or Dispute. Changed any mention of 'Investigator' to 'Support Advisor' as per role title. Updated any mention of '12-weeks' to new way of working, which is now '42 days'. Made subtle grammatical changes.