

## **Sales Code of Practice**

### **ROLE AND PURPOSE**

The purpose of this Code of Practice is to provide a framework within which Post Office Ltd can grow while protecting and supporting employees during the period of change and thereafter. This Code of Practice is designed to outline the principles, standards and procedures that will define our activities and behaviours for the future. The challenge is to build a viable Directly Managed network. This can be achieved by building a professional sales organisation while retaining our existing excellent customer trust and satisfaction ratings.

This Code of Practice has been developed jointly between Post Office Ltd and the CWU. It is an agreement that encompasses the sales policies, procedures, ethos and standards expected and is available to employees and managers for guidance and support.

Post Office Ltd are facing significant challenges to restore the Directly Managed network to profitability. We can maximise the size of the network by demonstrating our ability to transform ourselves into an outstanding sales and service organisation. The successful application of the Sales Effectiveness Programme in our branches will provide us with a platform to build a successful business that retains our customers' trust and appreciation, whilst at the same time enhancing job security and job satisfaction.

Fostering a sales-focused environment is essential to achieving Post Office Ltd 's business objectives. However of equal importance is how we do it.

Post Office Ltd and CWU recognise that the promotion and selling of products is a departure from past methods of working and represents a significant change to working practices for employees. This Code of Practice outlines how we jointly intend to introduce this change to ensure a fair, reasonable and consistent approach is adopted.

### **SALES EFFECTIVENESS**

The future of the directly managed network is dependent upon building a positive sales culture where good value products that meet customer needs are offered in a professional manner to the appropriate customers. All employees are expected to engage fully and positively with the Sales Effectiveness Programme and we do not envisage a situation where employees or managers can opt out of participating in the sales agenda. Equally we will not tolerate any form of hard selling, targeting inappropriate customers, mis-selling or placing undue pressure upon employees in directly managed branches.

The purpose of the Sales Effectiveness Programme is to build a sales culture where employees contribute to excellent sales performance on a consistent basis and where they enjoy participating. Our customers will value us because we provide them with good value products and services offered in a friendly and professional manner.

The Sales Effectiveness Programme is designed to provide a more robust sales model to branches by building on skills developed. There will be a consistent approach to activities on a weekly basis for all focus products, while ensuring that the campaign products receive extra focus and activity.

The approach to employees will be supportive and positive. It is recognised that there is great potential within our frontline employees and that the primary role of managers is to create an environment conducive to building capability so that employees can achieve their potential.

The role of Product Champions is to coach within branches and help to build capability. This role is a voluntary role. Where employees do not volunteer to become a Product Champion there will be no negative impact on either their PDR or CSA pay progression.

### **The objectives of our Sales Effectiveness Programme are as follows:**

1. To bring a culture of sales success to the business

2. To establish a people development and coaching culture within our business where employees become highly competent in selling our products and are continuously building their skills
3. To establish a consistent approach to the way in which we deliver business results
4. To ensure that our customers recognise us as an outstanding sales and service organisation
5. To build the skills of our people to ensure that our teams share in the rewards of the Sales and Profit Incentive Scheme

## **SALES TECHNIQUES**

The overall emphasis of the Sales culture is one of working as a team with all individuals contributing to branch performance. Branch Managers will conduct a half-hour sales meeting with their team on a Monday morning. The branch objectives for that week will be outlined and employees will provide pledges relating to customer conversations that they will undertake to ensure that their branch delivers on its weekly sales targets. It is expected that all employees will provide pledges. Employees will receive feedback on overall branch performance at the half hour sales meetings.

Branch Managers will forward the total number of pledges for the branch to their Sales Account Manager (SAM). Individual pledges will not be included in this communication and will not be retained within the branch beyond the current week. Neither will they be used for input or assessment into individuals Performance Development Reviews (PDRs) or be considered for Managing Underperformance procedures.

The success of Post Office Ltd's new sales culture is dependant upon Branches, at a minimum, achieving their targets. All individuals are expected to fully participate to achieve the teams targets, however, employees do not have individual personal targets.

Daily huddles will enable the team to ensure they remain on track throughout the week to deliver on their sales targets. Branch Managers will conduct these huddles on an informal basis during the course of the day and current procedures for start and end of day (as per BOSA) will remain.

## **NEW TRAINING**

The most critical aspect of Sales Effectiveness is the commitment to developing employees and building their sales capability. The new sales training is designed to equip employees with the knowledge, skills and confidence required to engage customers in quality conversations around all products and services. Post Office Ltd and CWU want employees to feel highly supported and valued for their contribution in turning the Post Office into an outstanding sales organization.

The current content in the half-hour Work Time Listening and Learning (WTL) session consists primarily of Health and Safety briefings, Have Your Say feedback, performance feedback, operational issues, product training etc. and this will continue.

Post Office Ltd is introducing an additional one-hour Sales Capability and WTL session on a Tuesday morning. This will provide more time for sales capability training. For the majority of branches, this will result in a later opening time of 09:30. Post Office Ltd recognise that some branches have current arrangements that necessitate an opening time prior to 09:30. Current WTL sessions will be incorporated into this additional time. Employees who do not currently attend early on a Tuesday morning, will continue to receive their half hour WTL training as at present. Managers will ensure that employee capability is developed within this time.

## **POST OFFICE LTD'S COMMITMENT TO EMPLOYEES**

Post Office Ltd's employees are the key success factor to achieving business objectives. As an organisation, Post Office Ltd is committed to promoting a stress free environment so its employees enjoy coming to work with dignity and respect.

Post Office Ltd are committed to supporting all employees who experience difficulties while the organisation develops the Sales culture. The extensive services of the Employee Health Services are available to provide this support.

We want to reassure employees that the Sales Effectiveness programme is not about:

1. Encouraging the hard sell
2. Offering products or services to inappropriate customers
3. Using pledges information in the managing under performance process and in PDRs
4. Putting employees under pressure to sell where appropriate support has not been provided to build confidence and capability

Workplace bullying is intimidation, which serves to undermine the competence, effectiveness, confidence and integrity of the person on the receiving end. It is critical that the sales strategy and culture is developed fairly and sensitively and we will not accept managerial or employee behaviour that is not consistent with this approach.

We will NOT:

...tolerate bullying or harassment at any level within the organisation at all times, including during the period of deployment of the sales effectiveness programme.

We WILL:

1. Offer positive support, encouragement and training to our employees to help them develop the necessary capabilities for their role
2. Encourage a fair, positive and commercially focused style of management within Post Office Ltd.
3. Take proactive steps to eradicate bullying and harassment and to
1. Provide appropriate channels through which employees can complain i.e. utilising the Bullying and Harassment Procedure
2. Support employees during and after the process
3. Investigate complaints thoroughly and within a set time frame
4. Deal with the perpetrators effectively
5. Always be open and honest with our customers
6. Not knowingly sell goods and services to customers which are inappropriate to their needs or means

Always act according to both the letter and spirit of our legal and regulatory framework i.e. FSA, Compliance and Anti-Money Laundering requirements

## **DEVELOPING SKILLS**

The success of the business depends on developing capability throughout the network. But these skills and capabilities do not come naturally to everyone, therefore Post Office Ltd have committed significant resources to +1 Sales Coaching, training and supporting employees. This is a long-term commitment on the part of Post Office Ltd.

There are several initiatives underway to enhance capability. Post Office Ltd will support managers in developing their coaching skills that will in turn benefit everybody. The business is also listening to what other needs there are, and will seek to provide solutions that benefit both the employee and the business.

## **PERFORMANCE MANAGEMENT**

The performance management process will be open and transparent. It is recognised that there are different levels of sales capability within the network. Post Office Ltd and CWU recognise that individuals will all commence at different levels of capability and develop at different rates of improvement. The approach to performance management will be to provide coaching, counselling, further training and support to employees who underperform.

## **REWARD AND RECOGNITION**

Rewarding and recognising employees is a vital part of making the Post Office® a rewarding place to work. With this in mind, the new jointly agreed Sales & Profit Incentive Scheme for CWU members gives

a clear focus on sales and business profit. This is in line with the business objective to sell products and services that are important to our customers, simply and at a profit while offering a real opportunity to enhance earnings.

To support reward and recognition a robust Management Information (MI) structure is being developed which will provide the following:

Focus Sales Products: Information will be available in directly managed branches via weekly sales activity reports and monthly sales report. This will enable employees in the branch to understand the branch performance against focus product income targets

Additionally, branches will be provided with information relating to the value of each Focus Product to the business, allowing them to make informed decisions about what products to offer to their customers to maximise income achievement

### **OPERATIONAL EFFICIENCY**

Duties will be adjusted to accommodate new training (half hour sales on Monday & one hour sales and WTL training on Tuesday) and changes to opening hours.

Branch Offices that have implemented new duties as part of the OE programme will be reviewed and, where necessary, total office hourage may be adjusted

Branch Offices awaiting OE duties will adjust existing duties to introduce the new model. Once these offices enter the OE programme the construction of OE duties will take into account the impact of sales training.

### **WORK LIFE BALANCE**

POL is committed to supporting employees in achieving work-life balance especially when there is a change in work patterns. All requests for flexible working arrangements will be seriously considered within the framework of the 'Flexible Working Guidelines'.

### **CONSULTATION & REVIEW**

Post Office Ltd and CWU commit to promote regular consultation on Sales Effectiveness programme and future sales strategy between Territorial Counter Representatives & Heads of Sales and between CWU Section Secretaries & Sales Account Managers. 'Have Your Say' (HYS) feedback will continue to provide information to Post Office Ltd. and CWU about employees views and opinions.

Post Office Ltd and CWU will review the effectiveness of this code of practice at regular periods of 6 and 12 months (or more regularly where required) with a view to improving the code in the light of feedback and experience.

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