

HELPFUL & NOT HELPFUL!

Following a prolonged period of consultation, debate and discussion between UNITE and Senior Management within the Retail Branch Network (RBN), Mike Bamber, Managing Director for the RBN issued in May 2011, a very welcome, positive and constructive communication to all LCEOs/SBMs and Branch Managers. A shortened version of the communication is reproduced on the reverse of this newsletter. The communication has proved helpful and has resulted in an improvement around the misleading and incorrect messages being delivered to staff at all level in the RBN. However despite the very explicit messages within the communication, UNITE's members are reporting to the union an all too large, frankly depressing and not helpful continuation of erroneous messages and dysfunctional behaviour across the RBN.

The purpose of this newsletter is to reconfirm some key and correct messages, if you are advised that these messages are incorrect or inaccurate, then you are being misled and you should contact the union for these issues to be raised with the bank centrally, the RBN is a tough enough place to work, there is no need or justification to make it any tougher.

Key Retail Branch Network Messages

- CSOs are managed against National Standards, which are maximum targets, not minimum. Branch Managers can set Kept Appointment Targets less than these maximums. Unite question whether these targets are pitched correctly, as if all CSOs achieved their Kept Appointment Targets, Branches and CAs would not be able to cope with number of appointments. These issues are being pursued with the bank.
- Kept Appointments for the purpose of CSO targets do not require a product to be sold, if the customer turns up, the appointment is kept, the same applies with a handover.
- CAs are currently targeted against Appointments, Products Sold and CVP, CAs are not to be provided with Run Rates or Specific Product Targets, in doing so the bank promote product based selling and not needs based selling, raising questions around adherence to the FSA, Treating Customers Fairly and indeed the bank's own Helpful Banking.
- If members mutually agree additional aspirational targets, failure to achieve these should not be managed as underperformance.
- It is not acceptable for the bank to send and circulate "performance e-mails" detailing the performance of individuals across a patch or region, it is equally unacceptable for the bank to conduct "performance audios" often involving numbers of other staff, performance discussions are 1to1 affairs.
- It is not acceptable for e-mails to be circulated regarding performance or any other issue that could be deemed threatening, intimidatory or in breach of the Dignity at Work policy.
- All overtime must be paid where the bank require staff to work in excess of their contracted hours, excuses such as no budget are not acceptable, TOIL should only be applied with the mutual consent of staff.
- If members are unable to operationally leave the branch at lunch time or work through their lunch, providing the relevant criteria is met, lunch allowance and where appropriate overtime/excess hours must be paid.
- Where members are required to arrive early or leave late for branch opening and closing, this forms part of the working day, not free time for staff to donate to the bank, this time should be paid or the bank should flex your contract accordingly to accommodate early starts or late finishes.
- Where Members work more than their contractual hours, the overtime policy should be applied, a position that is reinforced in Mike Bamber's e-mail.

These messages are by no means exhaustive, but represent the most frequent issues raised, where the bank is delivering incorrect and misleading messages to staff. Mike Bamber's communication was and remains warmly welcomed; however it is bitterly disappointing that a number of areas of the RBN continue to ignore or mis-represent the very explicit messages with the communication. We will continue to have dialogue with Senior Management within the RBN with a view to making the RBN a better place to work for all staff at all levels. However all the while new issues arise, such as the misuse, in UNITE's view, of Mystery Shopper reports and an ever increasing focus on performance and cash differences across the RBN. These issues will be raised with RBS Retail centrally and UNITE will continue to communicate with members on these key issues.

If you experience issues that you are unable to resolve locally, please contact your local Workplace Rep, the helpline on 0870 241 4425 or e-mail rbsinfo@unitetheunion.org

Stuart Davies & Alison Maclean – Joint Lead Officers
Unite RBS Helpline – 0870 241 4425

Join Unite the Union online at www.unitetheunion.org

MIKE BAMBER COMMUNICATION ISSUED MAY 2011

All,

As some of you will be aware we have regular discussions with Unite. Over the last couple of months a higher number of concerns have been raised with them by our staff regarding performance management. In particular, there is a challenge/perception that in Branch Banking we are using Reaching Performance to performance manage individuals on KPIs that are not part of their objectives.

Whilst I would not in any way like to generalise on the back of a number of specific instances, I do want to reiterate key messages about managing performance. It is essential that we, as leaders, are clear with our teams about our expectations of them, remove barriers to success, and support where development is required.

The vast majority of our leaders are doing an excellent job in this regard. However, if nothing else, there does seem to be a certain amount of confusion amongst our front-line staff over objectives and targets. The purpose of this email is therefore to provide you all with absolute clarity. Please note that I will take any issues raised to me that go against the below guidance very seriously and appropriate action will be taken.

There are 4 specific areas I wish to highlight:

1. I can confirm that in Branch Banking we do not manage CSOs and CAs against individual product run rates (e.g. putting an individual on an action contract for failing to achieve a specified number of sales per week of a single product such as Royalties / Advantage Gold). At an individual level we are looking for our people to sell across our full product range to ensure we are meeting customer needs. Where we feel an individual needs support in being able to discuss the full range of products with customers we will put mechanisms in place to support. And our KPIs back this up.
2. Our CSOs are not targeted against sales targets / CVP as this is not part of their objectives. However, where mutually agreed, managers and individuals can agree on aspirational targets to aid performance being exceeded. Failure to achieve these aspirational targets should not result in underperformance discussions or result in red appearing on a huddle white board as they are over and above agreed objectives.
3. We do not force staff to stay behind to fill diaries if branch performance is not where we would like it to be. Prospecting should be pre-planned and as a result should form part of the branch resourcing plan.
4. The use of generic team performance audios or e-mails to identify individual or branch shortfalls on specific products is not acceptable. If we, as leaders coach our staff on a 1:1 basis, using the sales toolkit we have at our disposal to help as many customers as we can through full reviews, we can achieve our sales targets.

Whilst these specific areas relate to sales, I think it is important to emphasise that all roles in Branch Banking have a number of objectives across a range of headings.

Finally, we are also getting feedback from Unite that staff are being expected to work over their contracted hours without any additional payment. Ideally our resourcing plans in branches should mitigate against the need for this, but when we have to ask staff to work more than their contractual hours, the overtime policy must be applied. It is not acceptable to suggest that there is no budget for overtime or lunch allowances and expect our people to work extra hours with no benefit.

We're building a business that responds well to customers needs, is regarded as a great place to work and where out-performance of objectives is our individual and collective aim on the road to rebuilding a great bank.

I know you are all committed to driving a culture of helpful banking and I hope that the clarity provided by this email will result in no more concerns being raised by staff.

Thank you for your continued commitment and support.

Mike