

POPAI entries; 15. Installation

Client: HBOS- Sept/ Oct 08 Branch refurbishment programme

Overview:

The project rollout saw the decluttering of branches and the installation of a new range of PoP units, designed to change the way colleagues and customers use leaflet dispensers and to improve the way in which marketing material is displayed. As well as installing new fixtures it was also necessary to relocate existing fixtures, de-clutter and merchandise fixtures to improve the display of the core product range in the banking halls.

CJ's were contracted to install a variety of marketing material into 925 Halifax Bank of Scotland branches.

Objective:

The initiative is part of the banks strategy to drive business through clear in-branch presentation, making it easier for customers to find the information they need. The new fixtures were also designed to improve the way Customer Advisors utilise the current marketing material, to increase awareness of the product offering and increase turnover.



Process:

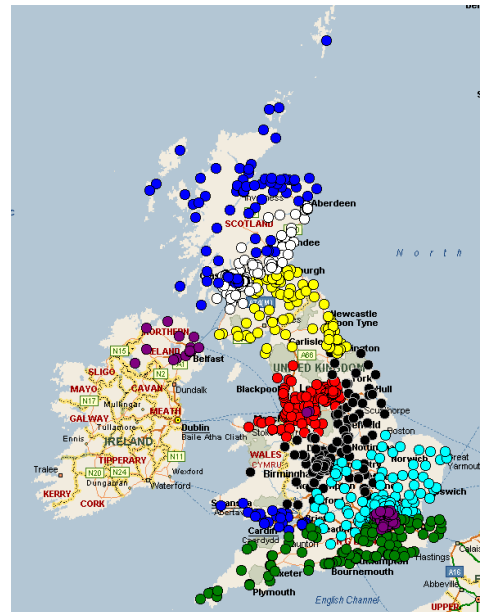
Initial trial

A pilot took place in 35 branches to test and determine the best project process and to commission a unit manufacturer and installation team. CJ's completed 13 trial sites in March 2008 with two other installation companies also being considered. We successfully completed the initial trial to become the Installation team used for the 925 site roll out, ahead of the competitors.

Implementation:

Planning:

- 8 weeks of installs
- 1 week of snagging
- 925 sites including offshore sites
- 1430 display units
- 2 man teams
- 10-12 teams of installers a week plus Quality Controllers in vans redistributing and collecting old POS.
- Large LWB vans
- All branches had a site specific floor plan with a customised planogram to be followed (Cad drawing).



Installation:

- Installers had to prepare the working area; using protective sheets etc.
- Before images were taken; to show any damage which may already be in branch. As well as highlighting what 'making good' is required, this also highlighted any other areas which require redecorating.
- Removal of existing PoS
 - Wall mounted literature displays
 - Free standing literature display
 - A0 & A1 Mobile marketing unit
 - A0 & A1 Poster frame
 - Business banking unit
 - Triangular Insurance unit
 - Managers special board
 - Hello & thanks for waiting Totems
 - Maitre D' Unit
 - Window banner
 - Investor in people plaque
- Everything uplifted had to be recorded, as well as everything installed.
- The brief had a huge emphasis on 'making good' the area were old PoS had previously been, these being wall fixtures, poster frames, display stands etc. This included painting, filling holes and fixing any other decorative damage, as well as cleaning the surrounding area to ensure minimum contrast. HBOS provided 5 different shades of paint to complete the making good process.
- The installation stage required CJ's installers to fit the following PoS:
 - A3 Range wall with backboard 55 Kgs
 - A3 Range wall 41 Kgs
 - A4 landscape range wall 44Kgs
 - A4 Portrait range wall
 - A4 range wall free standing unit
 - Redressed literature dispenser
- In certain cases existing furniture required moving.
- The installs were taking place during trading hours within busy branches, due to working in such circumstances the installers had to adapt the order of installs to suit.

- When siting the unit the installers had to use measurement and observation to determine the most appropriate position of the unit. The units were then merchandised to planogram.
- Merchandising of the displays with the corresponding leaflets was crucial to the effectiveness of the unit. As the leaflets had a particular order, to enable financial advisors, and Customer assistants to cross sell products.
- Merchandising varied within branches as there was different marketing material for Halifax and Bank of Scotland.
- The following existing fixtures had to be relocated:
 - Customer notice board
 - Business banking unit
 - A1 Poster frame
 - Wall mounted literature
 - Group property energy sign
 - Confidential waste bin

Questionnaire:

1. Did we install as per plan (if Yes go to Q3)
2. What unit did we not install
 - a. Floor
 - b. Wall
 - c. Window
3. Did we remove items as per plan (If yes go to Q5)
4. What did we not remove
5. Did we relocate items as per plan (If yes go to Q7)
6. What did we not relocate
7. Was any making good required (If no go to Q9)
8. Do we need to escalate for redecoration as a result of the install
9. Has the branch received the coaching pack from the NMC (If no go to Q11)

10. When do they plan to coach the team

- a. Never
- b. Within 1 week of install
- c. Within 2 weeks of install
- d. After 2 weeks

11. Were you able to Merchandise

- a. Completely
 - b. Partially
 - c. No
- When all work was completed and all areas were 'made good', installers had to complete the questionnaire and walk the store manager through all the changes made.
 - After this initial stage of store visits, a week of snagging took place to ensure all the installations were of the highest standards, with any issues resolved.

Reporting

As well as completing a questionnaire during the visit, comments about any issues and ideas for improvement for the store were reported via PopsysPRO to the client.

Real time data analysis provided instant awareness of successful completions as well as any issues which need to be escalated to the HBOS project team.

We were able to provide the client with:

- Hourly project status reports
- photo report
- Track job status
- PDA's data transmission
- Bespoke reports.

Recycling:

All of the old PoS items were removed and disposed of in line with ISO14001*, The environmentally cautious removal of kit was a key requirement for HBOS during the decision process when awarding the contract.

*ISO 14001:2004 is the latest version of the internationally recognised **Environmental Management Standard** for all types of organisation.

Documents given to the Installers;

Method Statement & Risk Assessment

Date: 28 February 2008

Client: HBOS plc
Site: Various Sites
Contract Number: HBO0002
Nature of Works: Various POS solutions

Contractor: CJ SERVICES (UK) LTD
15 SARUS COURT, STUART ROAD, MANOR PARK,
RUNCORN. WA7 1TS

All installation fitters, supervisors and managers will comply with the requirements of the Health and Safety at Work Act 1974, CJ Services and the client's safety policy, risk assessments and method statement.

Description of Work

Contact Branch Manger.
Sign in at Branch.
Explain Purpose of visit.

Identify the exact location of work.

Agree with the Host Organisation the exact location for the storage of materials.

Upon entry the CJS team leader heads a brief H&S discussion inc execution of delivery and removal of all items to and from site.

Protective sheets where necessary are applied.

Old POS units are removed before new POS units are installed.

Waste packaging is to be removed from site and disposed off by CJ Services.

On completion of our works the areas will be left clean and tidy.

Notify Branch Manager of the completion of work and gain his signature.

A quality inspection will be carried out on completion of our works and all necessary paper work and photographs taken.

Leave the site clean and tidy.

Sign out of Branch.

Preparation

All installation engineers will be supplied with individual job packs by the project manager which will contain full instructions, including escalation and reporting procedures in the event of problems arising. All installation engineers will have received full product training before commencing any work and will carry the necessary tools and fixings to cope with the working environment.

Security

The host organisation will agree the security to the site. Their arrangements will not be undermined by the activities of C J Services (UK) Ltd.

The C J Services (UK) Ltd agrees access times with the branch manager.

Compliance with on-site Health & Safety Procedures

Installation fitters will ensure they wear appropriate personal protective equipment e.g. safety foot wear, hard hat, hi-visibility jacket etc (if required on site).

Access to Site

Installation fitters will sign the contractors / visitors book upon arrival (where applicable) and report to the designated contact person. Under no circumstances will any work commence without the prior knowledge and consent of a responsible person on the premises where the work is taking place.

There is no permit-to-work system instigated by C J Services (UK) Ltd however access and permission to work will be agreed 2 weeks in advance.

Briefing & Methodology

All installation and supervision staff will have undertaken the CJ Services and / or client induction course, and will be fully trained in installation techniques. All installation engineers will have received training specific to the contract and/or attended an on-site installation. All engineers will be supplied with, and be in possession of, this project method statement and risk assessment.

Planning and Reporting

On all occasions installation engineers will refer to the plan before commencing work. They will satisfy themselves by inspection and measurement to ensure the work can be completed successfully. Any deviation from the plan must be agreed by the main client (via the project manager) and a signature sought to authorise the deviation. It is essential that reports to the CJ Services project manager are made daily. Reports to the client will be from the project manager.

Supervision, Controls and Monitoring

The primary on-site installer will ensure that safe working practices as contained in the method statement and risk assessment are complied with. He will directly control all work and will ensure that it is carried out to exact requirements and processes. In addition to this we guarantee to work toward the clients escalation process that they will provide.

The following personnel will be responsible for this work.

CJ Services Project Manager	Steve Ashley Jeremy Walker	07815096570 07779 165492
CJ Services Engineers	Named Engineer(s) or various.	TBC
Quality Control Managers	Roy Smith Phil Kitchin Graham Hunt	07810 181622 07779 782102 07810 181620

Additional Safety Precautions

All operatives will understand and comply with 'Drugs & Alcohol' policy. Section 16.0 of BAA Health and Safety will be taken into account and any accidents will be reported.

First Aid

C J Services (UK) Ltd will send at least one first aider to the site. All vehicles hold a first aid kit. All C J Services (UK) Ltd injuries must be reported to the Area Manager who will then inform the Host Organisation without delay.

Site Evacuation

CJ Services UK Ltd will follow the procedures set down by The Host Organisation for fire/site evacuation.

Operator Training and Plant

All operatives will be required to comply with the requirements of the site induction training given by this company and the client.

All operatives employed by or sub-contracted to this company will be experienced and trained in the work that they are undertaking. Experienced operatives will supervise any assistants (2nd man etc) or trainees. Should unforeseen circumstances reveal further training that is required, this will be provided.

Plant and machinery will be operated only by those competent, and trained / licensed in its use.

Power tools will be checked at regular intervals and a visual inspection carried out before use. Power tools will be battery operated and chargers subject to portable appliance testing at regular intervals.

Qualifications

Manual Handling
Health & Safety Training
Project Specific Training
PAT Testing
First Aid

Related Legislation

Health and Safety at Work Act 1974
Provision and Use of Work Equipment Regulation 1998
Personal Protective Equipment Regulations 1992
Manual Handling Operations Regulations 1992
First Aid at Work Regulations 1981

Available Guidance

ACOP Provision and Use of Work Equipment Regulations 1992
ACOP Personal Protective Equipment Regulations 1992
ACOP Manual Handling Operations Regulations 1992

Safety of Third Parties

All employees and sub-contractors will be made aware during site induction of any risks their work may impose on others in the vicinity. Work will only be undertaken when risks have been minimised or when adequate protection is in place. The primary installer will liaise with the client to ensure protection against falling materials is adequate. Every person has a duty of care to the next person.

Environmental Controls

Every effort will be made to keep noise, dust and waste levels to a minimum, and to ensure that they do not cause a hazard or become a nuisance to others. Working areas will be tidied regularly. Waste will be removed regularly to vehicles or to a secure or protected area and subsequently loaded into vehicles and removed from site to be recycled or disposed of.

The Asbestos Register

The Asbestos Register needs to be able to tell the Dutyholder and any people intending to work on the fabric of the site where asbestos containing materials may be expected to be found. It is also greatly helpful if it also refers to materials which may look like asbestos containing materials at first glance, but which (after laboratory analysis), are shown to have no asbestos detected – since knowledge of this can avoid someone stopping work because of concern about a suspected asbestos contamination which isn't actually there

Personal Protective Equipment, First Aid and Emergency Procedures

Personal Protective Equipment will be worn in accordance to site rules. All operatives will be made aware of first aid and emergency procedures at the site by the contractor on their first arrival.

Non-standard Activities

Should any work be non-standard, either in regard to the materials used or the type of activity to be carried out, an Appendix will require to be submitted before any additional works can be carried out. This will include necessary risk and COSHH assessments and changes to the method statement.

It will ensure that the work is carried out safely in accordance with current legislation and our own safety policy together with any site rules.

RISK ASSESSMENT FOR HBOS plc CONTRACT NUMBER HBO0001

HAZARD	RISK	PREVENTION	PRECAUTION	DAMAGE LIMITATION
Tripping	Low	Cordon off work area. Protect loose cables.	Health & Safety training. Project / Product training,	Use of emergency services.
Working at Height	Nil	Not applicable.	Health & Safety training. Project / Product training,	Use of emergency services.
Items Falling	Low	Tools or equipment stored at ground level when not in use. Use of guards where necessary	QC manager visits to sites Pre project/product training	Use of emergency services.
Electrical	Low	Visual Inspection	Cable Tester	Use of emergency services.
Fire	Low	On site Procedures	Health & Safety training.	Use of emergency services.
Tools & Equipment	Low	Health & Safety training. Product training,	QC manager visits to sites	
Noise	Low	Correct use of PPE.	Health & Safety training.	

			Project / Product training,	
Lifting	Low	Health & Safety training. Product training,	Manual Handling Training	
Ventilation	Low	Not applicable	Not applicable	Not applicable
Waste Disposal	Low	Client, site induction		
All physical injuries Eye damage Cuts/grazes	Low	Correct use of PPE.	1 st aid kits, no creams, lotions, pills	Authority from injured person to provide treatment
Damage to property	Low	Site Induction Use of correct equipment	CSCS training CJ Services training to all installation and supervisory staff	Use of emergency services.
Damage to client reputation	Low	Project Training Site Induction		Public liability insurance Indemnify to the client

Distribution and amendments to information

This document will be issued to the following: -

Company	HBOS plc
Quality Control	CJ Services
CJ Services	Engineers & Project Manager

All operatives working on site will be given a copy of this document and will be required to adhere to it. A master copy will be retained by the Project Manager in the contract file. Any requests for amendments to the document should be forwarded to the author listed below.

Document Prepared **Sue Swales**
By:

Signature of
Originator:
Date

28th February 2008

Authorisation

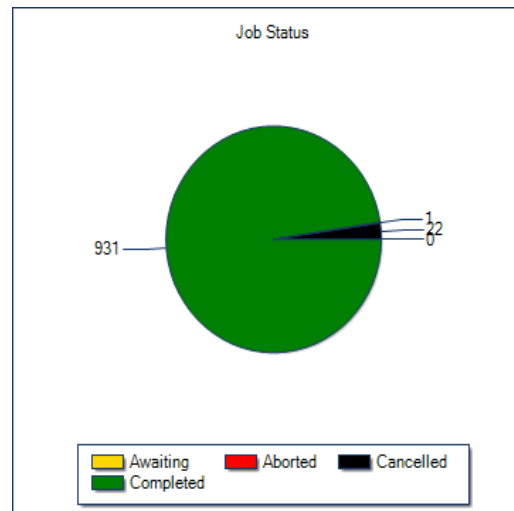
This method statement should be checked by the Health & Safety Officer of the client/main contractor and authorised by signing in the space provided below. Work will not commence until a signed copy of this method statement is returned to us.

Project Summary Report

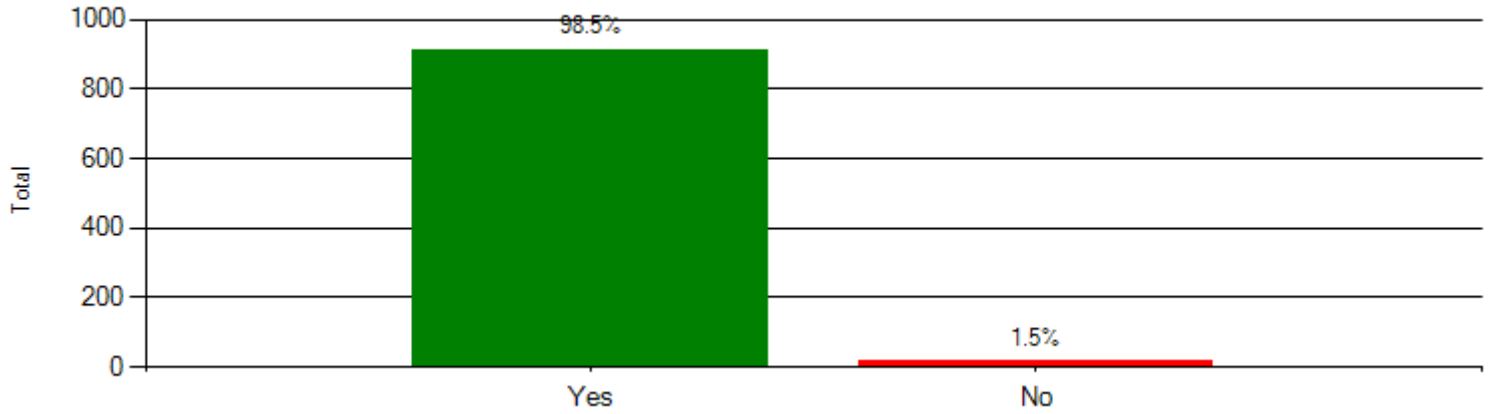
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Code HBO0002
Name HBOS Branch Refurb Sep08
Description
Project Type Roll Out
Start Date
Completed Date 31/10/2008

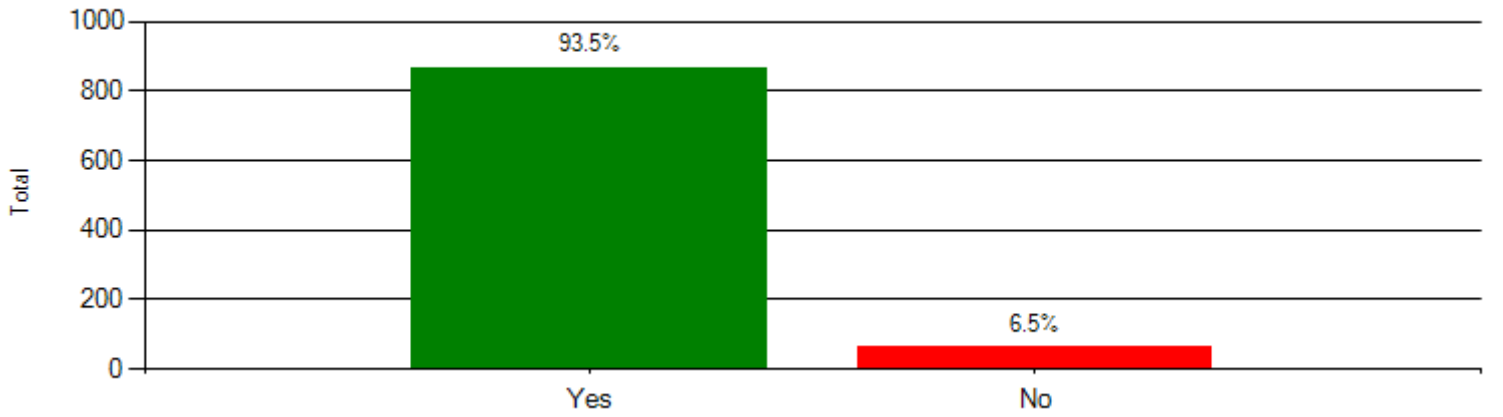
Job Status	Count	Percentage
Awaiting	0	0%
Completed	931	97.59%
Aborted	1	0.1%
Cancelled	22	2.31%
Total	954	100%



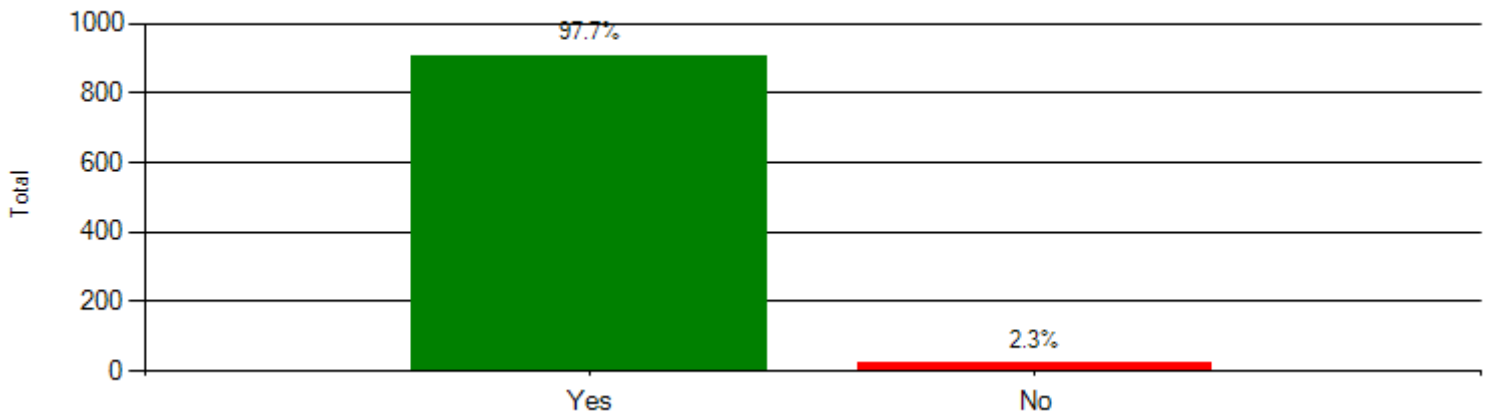
Did we install as per plan?



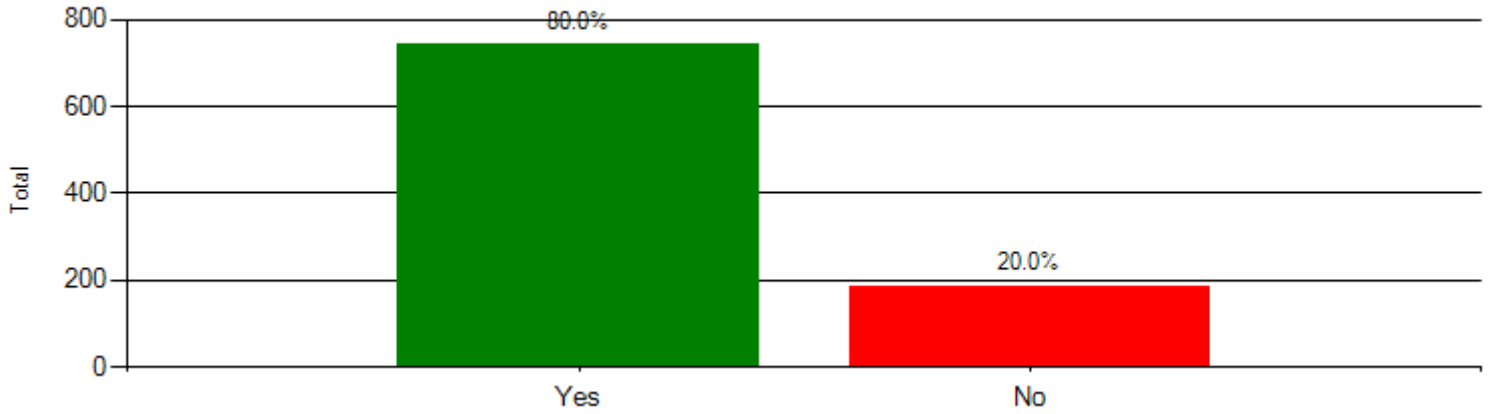
Did we remove items as per plan?



Did we relocate items as per plan?

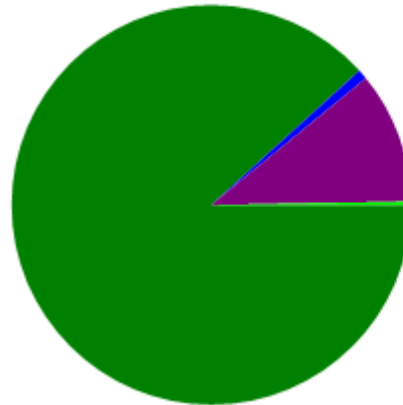


Has the branch received the coaching pack from the NMC?



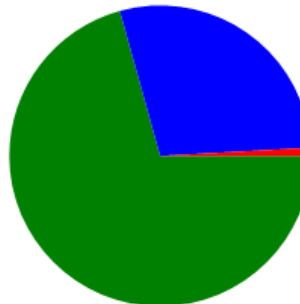
When do they plan to coach the team?

- Within 1 week of install (88.3%)
- After 2 weeks (0.8%)
- Within 2 weeks of install (10.6%)
- Never (0.3%)



Were you able to Merchandise?

- Partially (70.7%)
- Completely (28.4%)
- No (0.9%)



Installation:
Overview:



Unit Type	Total Installed
A3	171
A4	634
Window	87
Redressed	472



CJ Services

The In-store Sp

925 stores to complete, 925 completed within the 9 weeks **100.0%**

QC report:

Project	Score	Possible	RAG
EPI Marketing Stickers	70	70	100.0%
HBOS Branch Refurb Sep08	2412	2500	96.5%

We found the Branch Managers to be particularly helpful though out the installation process.

A number of boxes had missing or damaged items. By using the snagging team, carrying additional boxes, we were able to minimize the number of revisits by stocking up at the end of each night.

There were a number of errors on the plans and vouchers which caused for us to need to contact HBOS with issues.

Issues Management:

Issues have been resolved appropriately on site by following the agreed escalation procedure. Teams in general, were able to work on removals while a solution was found to issues raised by comparing the plans to potential problems highlighted during the walk around.

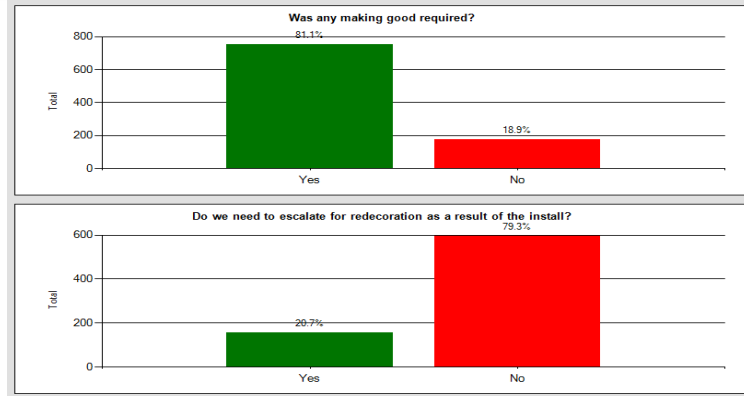
We found that the number of issues raised during the installation process was within tolerance.

Making Good:

This was extremely well done throughout the project. The percentage of stores requiring additional making good once we left site improved once the paint colours had been approved thanks to Mark Thomas:

We also found that once the trial week had been completed, the making good was naturally less due to nature of the kit that was removed from these initial stores.

Here are a few examples of making good we completed over the project:



MAKING GOOD



Project Title:	
Client Representative:	
Date:	

Please mark with an 'X' in the column that most closely matches your views on each question		Excellent	Very Good	Good	Poor	Very Poor
1	How did you rate our quotation in terms of accuracy of brief interpretation, how informative it was and how professional it was in its presentation?		X			
2	How did you rate the Training Brief supplied and, if appropriate, any training witnessed?		X			
3	How well did the scheduling of work meet with your requirements?		X			
4	How did you rate the quality of the work undertaken?		X			
5	If you made use of the Portal, how easy did you find it to use and did the reporting meet your needs? OR If you DID NOT use the Portal, how good was the reporting from our Projects Department?			X		
6	How would you rate the speed, response and accuracy of communications with CJ Services?		X			

7	How professionally was your project managed?		X			
8	How would you rate the handling of your stock through our warehouse?			X		
9	How would you rate your overall experience of using CJ Services for this project?	X				
		Very Likely	Likely	Possibly	Unlikely	Very Unlikely
10	How likely are you to invite CJ Services to quote for future projects / contracts?	X				

If you have any suggestions for improvements or any comments on our service, please record them below:

Comments

I look forward to another opportunity to working with both Steve and Jeremy. I have appreciated both speed of response and assistance/advice.

One area covered at the Post implementation review was the need to consider post install activities. Although we have covered the snagging issues well, I believe we could spend a little more on the actual planning of this activity upfront next time.

The extranet was an excellent support tool. Making the data easy for us to manipulate would have been helpful i.e. using branch names or our branch codes on all entries and being able to filter the spreadsheet info.

I believe the whole project experience has been very positive and a great deal has been down to CJ's involvement. Thank you.

Thank you for completing the questionnaire.

Please save this document and return a copy via email to customersurvey@cjservices.co.uk

Conclusion:

98% Compliance was achieved for this project as a whole. 925 stores HBOS stores were completed within the time frame and budget whilst working in live stores.

Making good within branches was of a much higher standard than expected reducing the costs for the client of commissioning more repair work.

This project resulted in revolutionizing the way HBOS distribute leaflets, from behind the counter to a consultative approach in store.

The web portal and up to date reporting were a huge benefit to the client during this project as it enabled them to check audits completed by another company, as well the 'making good' in all the branches. As the results show, our engineers prevented the need for redecorating in 79.3% of stores, saving a huge cost of redecoration.

