

## Customer Assistant Bonus Scheme

We are currently in discussion with the Bank over the changes needed to the CA bonus scheme for next year and over the next few weeks will be surveying members affected to get their views.

## LTU Policy

In the Bank's view this exercise will help complete the move to an environment where all front line staff see sales as absolutely central to their jobs. The Bank hold up as a major success the role the Customer Assistant bonus scheme has had this year in changing behaviour and focusing attention but there is more to be done.

Whilst we largely support these changes they will not in themselves redress the chronic staffing situation, reduce workloads, pressures and stress many members report and the further move to an out and out sales environment will simply continue to ratchet up the pressure.

This is a situation LTU intends to address and I will advise members of our plans shortly.

Members affected by this exercise or who have any questions on its impact should contact the Union's 24 Hour Advice Line on 01234 262 868 for independent professional advice and assistance.

**NICK HOLT**  
Assistant General Secretary

## Newsletters by Email

LTU offers members the opportunity to receive newsletters by Email.

We will send all newsletters for your area direct to you on the day they are sent to members by post giving you authoritative, immediate information on the issues that matter.

To register for the service all you need do is email us at [24hours@ltu.co.uk](mailto:24hours@ltu.co.uk) with the subject line "Newsletters and your membership number (your file or payroll number)" or phone on 01234 262868. We'll do the rest.

8 NOVEMBER 2006

All Members

# Network - Roles & Structure Changes

Members in the Network will now be aware of the Bank's plans to introduce from January next year a new staffing and role structure in branches. The changes involve:

- standardising the activity and role of all staff in the network regardless of branch size - building on the initiative the Bank refers to as "One Best Way" - which lays down what the Bank expects from each role and how it should be carried out on an hourly and daily basis. The Bank says it believes this role clarity with its increased focus on referrals and sales should help produce significant new business. Whilst role clarity is a good idea it remains to be seen whether this move to produce near "robot", as some involved in the pilot areas have suggested, results in better results and job satisfaction or hampers initiative and flexibility and damages job satisfaction.
- increasing the number of Band 7's all of whom will be accredited Account Openers and have personal sales targets.
- reintroducing the role of Customer Service Manager (CSM) to provide a dedicated focus

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## INSIDE Changes & Impact Explained

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on managing teams to deliver customer service and sales. Importantly the grade of the CSM will be linked to that of the Manager of the branch in question so removing the current confusion over grading of No2's in branches.

However, much as some of these changes are welcome there is no escaping the fact that the Bank's plans will have a major impact on grading with large numbers of staff likely to see a reduction in their grade. Indeed the increase in Band 7's is largely accounted for by displaced Band 6's. Bonus schemes for next year for all the roles are still under discussion with the Bank and I will keep members informed of developments.

The planned changes are further explained inside this Newsletter.

# Changes Explained

In short this exercise will see a significant number of downgradings in Band 5 and Band 6 roles and will impose new sales targets on large numbers of Band 7 staff who have never been specifically targeted in this way before.

The Bank has told LTU that approximately 140 Band 5U and 400 Band 6 staff face a downgrade as a result of this review but there should be an increase of approximately 160 roles at Band 5L. Full Protection of Pay and Allowances (PPA) will apply to all of these downgrades, including B5U to B5L which has additionally been agreed for this exercise (downgradings within Band are not normally covered by the salary protection arrangements) but nevertheless the future earnings and career prospects of these staff are likely to be limited severely by the Bank's actions.

As part of these changes, Premier Managers will become Senior Personal Banking Managers and Personal Account Managers will become Personal Banking Managers. The Bank has said that it is looking to recruit a further 250 Personal Banking Managers. Target and Bonus arrangements for these roles are currently under negotiation.

The selection process for the new roles and grades will take place over the next three weeks with all grading decisions to be 'grandparented' by 1 December 2006.

## Customer Service Managers

The Customer Service Manager role will be reintroduced into branches with more than 8 staff.

The main role of the CSM will be to provide coaching and training for staff in the delivery of referrals but they will also have responsibility for the operational issues in the branch.

The grade of the CSM will be linked to that of the manager of the branch in question as follows:

**Branch Manager Band 3L - CSM Band 5U**

**Branch Manager Band 4U - CSM Band 5L**

**Branch Manager Band 4L - CSM Band 6**

**Branch Manager Band 5U - CSM Band 6**

**Branch Manager Band 5L - CSM Band 6**

**Branch Manager Band 6 - No CSM**

Additional Band 6 Team Leader roles will exist depending on branch size, with specific responsibility for an area of customer interaction in the branch.

What is not clear at present is the bonus scheme which will apply to the CSM role. If CSMs are to be given the proper opportunity to carry out the coaching, training and operational role in their branch then they must be rewarded by the 'Managers' bonus scheme. If they are left to earn bonus by generating sales and leads themselves under the £3/£5 Customer Assistant scheme then

there will be no incentive to carry out the major part of their role in light of the financial penalty they would otherwise face.

## Band 7 Staff

Another major impact of this exercise will be on staff at Band 7.

From 1 January 2007 the Bank intends that all Band 7 staff (excluding Business Customer Advisors) will be re titled Senior Customer Service Assistants and will be account opening accredited a direct result of which is that they will have specific sales targets.

Of course all of the 400 staff who are downgraded from Band 6 will face the 'double whammy' of both downgrading and the imposition of a sales target.

We are still discussing with the Bank the nature of those targets and how it can reconcile national consistency whilst reflecting local circumstances and take proper account of the opportunity provided by individual roles and individual work patterns.

## Protection of Pay and Allowances

The Bank has told LTU that it does not expect there to be any redundancies as a result of this restructuring.

All staff who do face a downgrade as result of the exercise will be protected by the rules negotiated by LTU on the Protection of Pay and Allowances (PPP1.20). These provide that

although the downgrade takes immediate effect (in this case from 1 January 2007) current salary will be protected and will never reduce.

Subject to there being no documented evidence of under performance, those staff will then receive for the next three years a pay increase equal to the median movement in the Band 6-2 Pay Zones. After that three year period, salaries will simply be measured against the appropriate Market Indicator or Local Pay Zone for the Band in question.

## Visual Management Boards

Tucked away in the detailed role template for Local Directors and Branch Managers is the introduction of a display board designed to show the individual performance of individual members of staff in branches. Whilst LTU is happy for staff who are successful in their role to be praised in public in this way, the public castigation which is likely to arise as a result of those who are less so is entirely unacceptable.

There has been a long-standing agreement between LTU and the Bank that such public 'naming and shaming' is inappropriate and should not happen.

We have taken this matter up with the Bank as it not the way to motivate staff or create the right climate of team work and co-operation needed to be a great place to work or deliver high performance. This might be something which works or is acceptable in the United States: it isn't acceptable and won't work in the UK.