

## Role and Duties - Express manager apprenticeship

*The role and duties list was built as a first version with IFA Martin Keeves in 2021. Updated from various IOC operator meetings 2022. Delivered as learning material exercises in the first candidate tranche of the UWL L6 students 2023. Further discussed at Trailblazer group round tables 2022-23.*

*The role and twenty duties are detailed below, these are an extension to the published standard.*

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### Express Delivery Manager

#### Role Occupation summary

**This occupation is found in** the logistics sector and provides the management and control of express logistics, dedicated sortation facilities (called 'sortation hubs'). These sortation hubs are the heart of the collection and delivery services that enable the very rapid sorting and distribution of goods. They are located in all parts of the UK, generally close to major transport corridors and airports.

Express Delivery Managers often work for employers that have a national network of sortation hubs and in some cases international coverage. Smaller organisations may only have one sortation facility which may serve a local geographical area, specialise in certain types of goods (such as clothing or foodstuffs), offer specific services or serve a specific client (such as the NHS) or clients. The occupation is found in the sorting offices of national postal and courier parcels delivery services.

Employers range in size from large multi-nationals, employing more than 10,000 people to small privately owned regional operations who employ fewer than 50 people. Apprentices will have transferrable skills that can be used across organisations in the sector. These organisations are not limited to dedicated express delivery operations, but can expand to include key suppliers, specialist consultants and the wider freight logistics industry. Most employers are in the private sector, but these skills are employed in government bodies and the defence sector.

Employers in this sector provide the vital link between those sending and receiving a very wide range of letters, parcels, packets and parcels, food and prepared meals and other packages.

A few sortation hubs have direct rail links but the majority rely on the national road network for distribution. The work is always highly organised and often uses the latest technological solutions, as sortation hubs can process millions of items each day.

**The broad purpose of the occupation is** to manage the people and physical resources in a sortation hub in order to achieve the key performance indicators, which will focus on the successful processing of items within the required timeframe. Sortation hubs do not store or deliver goods. Instead, they provide an express service, turning around the distribution of these goods to couriers/postal services and other road transport operators at great speed, often within a few hours of receipt.

This role requires a range of business skills, including data analysis, key performance indicator-based management, real time business planning, time-critical decision making and innovation in route planning.

Sortation hubs receive, assess, and sort goods by destination. These goods are then collected for “final mile” delivery. Goods are typically small and are either manually or automatically sorted and handled, and could be almost anything, from online shopping orders intended for home delivery, food or meal deliveries through to business-to-business sales. Sortation hub operatives are vital therefore in ensuring the smooth running of these complex, often automated operations.

Express Delivery Managers can expect to work indoors and at a fixed site. Because sortation often takes place overnight, they can expect to work alongside colleagues to provide 24 hour management of the hub, thus this commonly includes some unsociable hours.

As a manager in a competitive business environment, the express delivery manager must ensure an efficient and cost effective operation, minimising cost and waste in the running of the sortation hub. In line with wider responsibilities of their employer they must also seek to reduce the environmental impact of the operation through efficient use of resources (such as fuel) and careful planning of activities, such as the delivery routes used for goods despatched from the hub.

**In their daily work**, an employee in this occupation interacts with line managers in the sortation hub, normally the supervisors of the teams of sortation operatives. They also interact with other senior staff in their organisation such as the finance and HR teams who may be based elsewhere. They may need to contact a specialist colleague or team following a major issue or problem, for instance with their IT systems or sortation equipment. Express Delivery Managers may also liaise with the client organisation who is either sending, delivering or collecting items through the hub. These may be retailers, wholesalers, manufacturers, courier companies or postal companies.

**An employee in this occupation will be responsible for** completing their own work to specification, with minimal supervision, ensuring they meet set deadlines. They are responsible for ensuring that the sortation hub works in accordance with the legal framework for their business. This will include employment law, health and safety requirements and may include HM Customs rules, GDPR, safeguarding laws and in some cases a road transport operator’s licence. As part of the wider management team in their organisation, which will include the managers of other sortation hubs, they need to deliver long term organisational business success whilst acting in a sound environmental and ethically acceptable way.

## **Duty 1**

### **Developing and implementing business strategies, financial and operational plans in express logistics.**

The company business strategy is the route on the map that will be directed by which business model, or map you want to use. The strategy is the action taken to achieve the company goals and the business model is how the company operates within the sector.

## **Duty 2**

**Providing a leading role in implementing and maintaining the key performance indicators, measuring delivery speed and reliability to achieve service standards which includes a time promise to the customer.**

The key performance indicators are achieved in an effective and appropriate manner, and in line with customer expectations and service promise.

### **Duty 3**

**Interpreting data to manage volume flows through the express collection and delivery process.**

Data is interpreted to produce an effective flow of parcels for collection and delivery processes.

### **Duty 4**

**Creating, managing and implementing company policies related to collections, deliveries, failed deliveries and returns.**

Creation and implementation of company policies and instructions; for example, impact of delivery of age-restricted goods, failed deliveries and returned items (either unwanted, wrong or damaged), showed evidence of management of process.

### **Duty 5**

**Managing operations to ensure correct sortation labelling and packaging of goods in the network.**

Management of identification of goods through the network, identifying correct sortation labelling and packaging of goods across depot codes and route networks including multi-labelling and failed or damaged labelling. Identifying impact on others when re-labelling takes place in the context of depot and route or package volume to service provision.

### **Duty 6**

**Ensuring that the express logistics operation complies with all legal, regulatory requirements; leading in dealing with security breaches & identifying match of operations to quality standards.**

Demonstrated how to apply commercial and employment legislation in the workplace; complied with legal and regulatory requirements relating to express delivery services including mail licensing. Identified impact and showed how to deal with security breaches. Ensured compliance with data protection legislation for LSPs and development in GDPR. Demonstrated the use of commercial acumen and its impact on sortation and delivery services.

### **Duty 7**

**Complying with the law and contracts in sortation, express delivery, and postal services.**

Demonstrated audits for law and government legislation for both business, road and sortation standards. Identified impact of such standards such as fuel efficiency or road safety wins. Demonstrated process for audits of such quality standards.

#### **Duty 8**

##### **Managing operations to ensure compliance with customs regulations related to bonded goods.**

Demonstrated compliance with customs regulations, dealt with an application for bonded goods with duty or import VAT.

#### **Duty 9**

##### **Managing the organisations policies, safeguarding, legislative and regulatory requirements such as an 'O' licence.**

Complied with the requirements of safeguarding policy and legislative and regulatory requirements, demonstrated vehicle fleet legislation and showed how to develop and implement such legislation as an O licence. Actively promoted policy and its impact on various size of vehicles in fleet and how that impacted on customer deliveries in a variety of geographic density, rural and city locations in the LSP network.

#### **Duty 10**

##### **Implementing quality standards in the LSP where they comply with business operations.**

Identified quality standards that comply with the business process, showing how to develop and implement these standards in business operations.

#### **Duty 11**

##### **Acting as a brand champion of the LSP, meeting existing customer expectations and improving customer service, communicating delivery performance.**

Managed customer expectations. Responded to competitive pressure from other LSPs, customer's needs and identified ways to improve customer service. Developed ways to improve customer service and returns operations, particularly in brand presentation at final mile. Demonstrated how to develop and implement customer relationships and identified impact of communication with clients.

#### **Duty 12**

##### **Preparing and presenting bids to new customers for express services.**

Effective bids and presentations delivered to new customers, showed impact of clean air zones, congestion charge areas for geography of that client in the bid and achieved a match between operating capacity and customer promise.

### **Duty 13**

**Line managing people in LSPs, applying performance management to achieve standards and meet targets, demonstrating empowerment of people and use of complex data, applying reading and learning to influence own practice.**

Performance of team in maintaining LSPs, national, regional, to local depot to performance standards within budget. Evidence of continued professional development.

### **Duty 14**

**Reviewing sortation operations and developing innovation with latest technology.**

Implemented technology with impact of continuous improvement techniques that detailed innovative service propositions. Showed geography match of sortation hub to customer, showed sortation improvement and how it increased sortation machine speed to match operating capacity achieving the customer promise.

### **Duty 15**

**Informing the team about new and existing streams of work, informing cost in the business, matching to quality standards and reviewing continuity.**

Confidently presented to the team, finding data streams in the business, using information that identified data to track costs in the business for both time, vehicle, fuel and impact on the continuity of operating capacity.

### **Duty 16**

**Demonstrating ways to minimise business costs while meeting customer requirements.**

Adequately demonstrated an understanding of activity based costing (ABC) and showed its application across different products of time value in the customer promise, urban density, multi day to same day, single and multiple delivery to same location, consolidation, costs of delivery failure, delivery package damage and return logistics meeting customer requirements.

### **Duty 17**

**Carrying out financial & data analysis, forecasting to propose a financial plan.**

Showed application of a financial plan for the LSP for future growth in express delivery. Demonstrated business forecasting and modelling in express delivery development, showing match between both road and sortation streams. Geographic match to express delivery in the network and geographic hot spots for express delivery such as Heathrow, London and the East Midlands Golden Triangle.

### **Duty 18**

**Implementing best practice in express logistics.**

Demonstrated identification of goods that pose a risk to health and safety. Showed application of regulations relating to hazardous and perishable goods. Showed impact

relating to the movement and handling of those goods using lifting and other equipment in context of the speed of movement and the potential damage to such goods. Provided leadership on understanding of sortation equipment and vehicle checks in the LSP operation. Showed the daily equipment checks required in the operation. Explained such checks and requirement for reporting of findings to aid rectification.

#### **Duty 19**

##### **Applying dynamic risk assessment principles to express services, ensuring business continuity.**

Understands the business continuity plan in context of dynamic risk to express sortation. Identified impact of bandwidth in the delivery network from the dynamic risk impact of customer change where delivery has shifted to multiple days of week and late evening of final mile delivery service from conventional nine to five. Explained business continuity and showed how to develop and implement a business continuity plan that reduces risk and ensures the infrastructure of the LSP to supporting express operating capacity in the client chain.

#### **Duty 20**

##### **Working in line with the LSP operational plan to both short and long term changes in the external environment.**

Shows recognition of the evolving nature of express logistics. Showed short term change in the express environment such as peak periods of Black Friday, Cyber Monday and showed long term change in the evolving shift of express numbers from bricks and mortar to e-retail. Showed application of those changes to the operating capacity of the LSP delivery network bandwidth in terms of the operational plan

## **L6 KSB List Express manager**

### **KNOWLEDGE**

- (K1) Theories and techniques of; strategic business management and business operations, performance management and key performance indicators.
- (K2) Range of sortation hub services; consolidation, brokering services, collection services and locations used as collection points, concept and processes of reverse logistics.
- (K3) The importance of route optimisation and the methods used to optimise routes; bespoke and generic hardware and software used to manage deliveries and collections.
- (K4) Implications of volume and of weight of goods in allocating goods to vehicles and routes.
- (K5) Factors affecting profitability of delivery or collection. Analysis of route density, achievement numbers and time slot selection.
- (K6) Principles of commercial, common contract law and insurances as applied to express delivery operations.
- (K7) Customs regulations applied to international movement of goods; customs bonded storage.
- (K8) Laws and Regulations applying to transport operations; Operator Licencing, Transport Manager Certificate of Professional Competence, Fleet Operator Recognition Scheme.
- (K9) Laws and Regulations applying to specific goods; Postal Common Operators Procedures Code, Mail Integrity Code of Practice, controls relating to dangerous or hazardous goods, foodstuffs. Data protection legislation.
- (K10) The relevance and impact on business operations of legislation for safeguarding young people and vulnerable adults.
- (K11) Range of Quality Standards used in the sector, the factors that determine which quality standards are used and their impact on business processes.
- (K12) Determinants of consumer behaviour; ability to influence customer choice. Methods of customer relationship management; techniques for building customer relationships.
- (K13) Methods of communication; face to face, sharing information about service performance, impact of social media on customer communications.
- (K14) Employment Law as it applies in the sector.

(K15) Theories and principles relating to; management of conflict in the workplace, disciplinary procedures and processes, management and development of people, training, coaching and mentoring

(K16) Theories and examples of Business Transformation, principles of business innovation, continuous improvement principles.

(K17) The business models for express delivery services; employed, self-employed and mixed fleet couriers, types of contract and payment processes used by companies.

(K18) Financial implications of different business models, PAYE employment, self-employment, mixed vehicle fleets, corporate structures.

(K19) Methods used to analyse where costs occur in the business process.

(K20) Health, safety and security regulations related to goods carried and how these impact on business operations.

(K21) The potential environmental and air pollution hazards associated with express delivery, postal and courier services in urban and rural environments.

(K22) Range of potential economic contingencies and their impact on business operations.

(K23) Principles of business continuity.

(K24) Theories of risk management, the range of tools used to manage and mitigate business risk.

(K25) Techniques of dynamic risk assessment.

(K26) The cyclical and seasonal nature of express delivery demand and strategies for adapting to demand peaks and troughs.

## **SKILLS**

(S1) Develop and implement business strategies and operational plans for express delivery organisations

(S2) Develop and apply key performance indicators.

(S3) Interpret data to manage volume flows through the delivery/collection process. Create and manage the implementation of company policies and instructions related to collections, deliveries, failed deliveries and returns.

(S4) Manage operations to ensure correct labelling and packaging of goods.

(S5) Apply commercial and employment legislation in the workplace; comply with legal and regulatory requirements relating to express delivery services, deal with security breaches, and ensure compliance with data protection legislation.

(S6) Demonstrate commercial acumen, manage contracts for sortation and delivery services. Comply with law and contracts in sortation, express delivery, and postal services.

(S7) Implement processes for audits in relation to quality standards.

(S8) Manage operations to ensure compliance with customs regulations related to bonded goods.

(S9) Apply organisation's policies relating to safeguarding of young people and vulnerable adults.

(S10) Ensure vehicle fleet meets legislative and regulatory requirements. Implement quality standards in business operations and ensure that business processes comply with quality standards.

(S11) Understand and consistently meet customers' expectations, respond to customer's needs and identify ways to improve customer service.

(S12) Develop customer relationships, communicate with current clients. Share information about delivery performance with customers.

(S13) Apply knowledge to the writing and presentation of bids to customers for new work.

e(S14) Be able to line manage people.

(S15) Apply performance management techniques based on data, drive the achievement of standards and targets in the operation.

(S16) Be able to build and manage teams, demonstrate empowerment of people.

(S17) Apply continuous improvement techniques to sortation operations, develop innovative service propositions, and apply technology to sortation activities Demonstrate confident presentation skills. Present complex data and information in a business format, show how reading and learning influence own performance.

(S18) Use data gathered from operation monitoring to track costs in the business. Carry out activity-based costing.

(S19) Demonstrate ways to minimise business costs while meeting customer requirements.

(S20) Carry out financial analysis, data analysis and data management.

(S21) Carry out business forecasting and modelling, propose a financial plan.

(S22) Comply with regulations relating to the movement and handling of items, handling goods correctly using lifting and other equipment where appropriate. Manage operations to ensure that appropriate daily equipment or vehicle checks are carried out and rectification of reported faults takes place.

(S23) Apply dynamic risk assessment principles to sortation and delivery services. Apply methods to ensure business continuity; create a business continuity plan.

(S24) Adapt business processes to both short term and long term changes in the external business environment.

## **BEHAVIOURS**

(B1) Acts as a company ambassador, shares business core values. Customer focussed, strives to improve service quality.

(B2) Authoritative, Confident, Positive.

(B3) Engages positively with colleagues and clients, is creative and innovative.

(B4) Takes personal responsibility for the environmental impacts of express delivery, postal and courier services and strives to reduce those impacts. All-rounder, Pro-active, Willing to challenge.

(B5) People person, Empathy, Recognises good and bad behaviours. Reliable, Accurate, Process driven.

(B6) Is calm under pressure and focused on solutions not problems