

Wine Standards Inspector - Inspection User Journey								
	Before Visit			During Visit		After Visit		
	Plan	Schedule	Prep	Inspect	Enforce	Report	Follow Up	Service Admin
Job to be done	Plan programme of inspections	Schedule inspections & Pre-visit Risk Assessment	Prep for visit & Pre-inspection procedures	Arrival procedures & Main Inspection	Post inspection procedures & Issue warnings/enforcements	Complete Report & Issue warnings/enforcements	Follow enforcement procedures	Record expenses and effort
Tasks Performed	Use a risk rating tool to determine frequency	Sheduling lead times vary by WSI & region (weekly/monthly/quarterly)	Usually a day or two ahead of visit, sometimes more for larger sites (e.g. bonded warehouse)	Navigate to location by car or by public transport & on foot in London	Loose closing meeting to recap, decide next steps and share contact details.	Write a follow up email to the FBO to overall recap actions and AOB	Possible follow up any agreed FBO actions or enforcement requesting photos or label design images	Update locally stored scheduling spreadsheet (each WSI's own area) - turn the row green or delete it after each completed visit and report write up
Technology and systems used	Risk determined by FBO type & activity, partly infringement history	MS Excel to track weekly visits	Collate info, familiarise with past report, business info, names, company structure, past emails, registers as per FBO type	If FBO no answer leave their details on a repurposed temporary movement notice	Provide FBO with guidance & advice based on FBO observations & questions	May need to research and answer specific questions asked onsite with follow up direct email after visit	Follow up of FBO actions or enforcement issues may prompt an unannounced visit or next visit deadline agrees with the FBO. In practice minor items wait until next scheduled inspection.	Send progress reports monthly in an excel file to leads
Pain Points	Multiple variables for assessing risk - hard to get sense of / learn	Each WSI has a different way of tracking weekly progress, some colour code, some delete from in their excel tracker	Print out FBO type specific discussion guide or advice & guidance	FBO can cancel at short notice, not be in when WSI calls or refuse entry.	May leave copies of discussion sheet with the FBO or supply other guidance then (spare print out) or later over email.	Personal Email inbox used for correspondence, sometimes wine standards shared inbox	A loose follow up approach to infringements is a risk to service delivery and consistency	Excel Spreadsheet visit tracker. Stored on one drive or local machine. Annually compiled, contains full years targets from April-Mar. Tracker spreadsheets are WSI area specific and owned.
Opportunities	Late Feb nominated WSI pulls off a list of all sites due for inspection in upcoming year (national)	Diarising visits involves: - identifying what sites to cluster/go after - ringing around and juggling diary slots / changing tack	Use: Wisdom (reports / infringement), Access for business summary, N:Drive for reports, emails, photos, (s drive historically), also personal one drive, Food.gov (vineyard register)	WSIs lack a standard care or form to leave when they have attempted a visit	Want to be able to guide FBO to specific content, often provided later by email	Assistants cannot be easily reached / the main contact post visit - must pass to WSI or Lead to follow up	WSI's receive any sampling results from laboratories by email (returned direct to WSI who send it).	The annually compiled tracker / targets data is worked on outside the main database (Multiple versions of the truth / becomes out of date over time & risk of accidental deletion or input error).
Challenges	Nominated WSI manipulates data into regions - sends to the local WSI	Assistants have time constraints to arrange appointments (1wk ahead) if days working not fixed	Clear user frustration with multiple data / information sources to consult & inconsistent storage practices between WSI's, past & present	Locate named contact and / or correct person at the FBO site / office	Can't show the FBO specific guidance relevant to the visit on a small phone screen	Assistants have limited availability to coordinate sample collection for lab work.	Touchpoints : email	Tracker status indicators are personally maintained and may not be accessible to others who may need to cover the work of a specific WSI
	WSI's will take their area's list and identify low risk sites to delegate to assistants	FBO can change plans at short notice (disproportionate impact on PT WSI)	Inconsistent report writing styles / level of detail between WSI's (past & present)	Conduct 'opening meeting' to explain the FSA / WSI role, start the crib sheet 'Questionnaire'	Need to carry paper forms etc. to provide onsite	Enquiry management is very time consuming / volumous	Standardise follow up procedures and ensure these are captured in planning and not in competition with meeting annual KPI's	A single national 'live' planning database / scheduler, visible real time progress with accessible management information for team leaders.
	Microsoft Access (on citrix) report of upcoming year visits	Identify local adjacent site - motivated to save time & travel costs	Inconsistent file / folder naming standards, some lead with FBO name, others with WSB Number	Establish any material changes to the business and products handled (as per last inspection profile)	Touchpoints : Guidance, website, email	Report writing can vary vastly in effort from 0.5 hrs to 0.5 days, done as soon as possible but no upper time limit (circa a week or two on average)		Record expenses and time /effort by filling in the activity tab in the Access DB and also i HR
	Microsoft Excel to organise / split regions & risk	Using Phone, email, outlook calendar, access / wisdom for contact info, companies house	Photo / File attachment feature in Access DB not reliable / trusted (store pics on N drive)	Cover: - status update (on last insp), validating information held, inspecting FBO paperwork e.g. VI1s or label designs, "follow your nose" based on answers, ask to see product if stored onsite.	Lack of faith in website means reliance on paper copies, emails and other notes	Customer experience could be inconsistent or quality suffer due to lack of reporting deadlines		Touchpoints: MS Access& iHR
	Individual Email distribution of spreadsheet	Automate help with scheduling	Lack of trust in being able to access drives or database reliably due to historic IT failures (breeds workarounds)	Info recorded "ad hoc" in own notes to personal preference, only very rare to use contemporaneous notebook	Poor website experience generates loop	Report usually written first in word document and then copy & pasted into the database to avoid data loss. Both versions stored.		Duplication of time and expense recording in two separate systems
	Information is not synced / linked back to database	Mapping to show close by sites (efficient to tag on)	Gather 'grab bag' tailored to FBO for the field:	Standardised forms across WSI's & regions	Knowledge Management Strategy: inc. Single owner / editor of guidance central storage of most up to date version of truth	Writing directly to the access database is unreliable / unstable, creating a double handling of reporting and multiple versions stored		A single 'record it once' location for time and expense logging with accessible MI for team leaders.
	Wine database and power BI (for MI) are not compatible	Automated booking system for FBOs to choose a slot	Last report with FBO name / contact info added, Aide memoire/Crib sheet, guidance (issue/legislation look up Matrix, Moc sections etc.), enforcement notice forms and pads (carbon paper)	<- as prep stage	Bonded warehouse visits may be tackled as a team of full time and part time inspectors	Format can be in bullets or comprehensive descriptor, or only mention changes since from previous report.		
Process Flow	Lead works with the WSI in setting /agreeing annual targets		Enforcement notice forms and pads (carbon paper) e.g. prohibition / movement control. Seizure stickers or tape. Sample bags & paperwork	<- as prep stage	Scope and scale of bonded warehouse drives different resourcing needs / cross region coordination	Report writing processes and reporting styles (content, granularity etc) not fixed - personal styles vary widely between WSI's. Inconsistency develops in reports over time between WSI's, across regions and FBO's. Adds time & complexity in future prep work for others e.g. Assistants, new WSI etc.		
	A single national 'live' planning database / scheduler , filtered automatically by wine region and / or FBO type. Visible and open to all, with 'assignee' statuses or automatic allocations (e.g. only WSI for north can allocate northern FBO's but all can view)		Official Notebook, Personal Notebook, clipboard / folder, phone	<- as prep stage	Variable locations = inspection / tour length varies. Might be: traders small back-office to large boardroom, small storage unit to huge cold & busy picking warehouse, vineyard fields & acreage to home of vineyard owner,	Compilation using MS Word processor, finished report copied to & stored on Access DB. Enforcements/Infringement codes also logged on Access DB.		
	Take with: FBO type (trader or vineyard) advisory document (updated sheet of current industry wise issues)			<- as prep stage	Contextual differences can provide challenging and varied context in which to review / complete paperwork	Photos are added to both Wisdom and the N Drive (copied over from local device or one drive)		
	Training for consistent use of tools / technology		Website / FAQ resource to support FBO's self service and WSI's to signpost them to		Bonded warehouses: Jot infringements on a 'running sheet' (1 per trader) as they go to manage scale and help with later write up	Feature to attach photos to the Access database is broken / unreliable, creates double handling		
	"One tool" to handle it all"		Comms management strategy e.g. encourage central mailbox use / web help query (manage overburden in local WSI mailbox)		Filling in evidence bags and slips - 3 in total (1 for the lab, 1 for the FBO, 1 spare kept by inspector)	Scan Enforcement forms (if issued) and store on NDrive or Wisdom		
	CMS for customer / case management		CMS for customer / case management		Filling in enforcement notices - either on carbon copy pads, on normal forms with a photo taken or photocopy	Log infringements codes in appropriate tab in the Access DB		
					Photos (phone, app & onedrive) Forms (enforcements notices), contemporaneous notebooks (FSA) issue	Email enforcements to CSU and legal for record and sending out to the FBO		
					Reliant on asking to use FBO photocopier facility for enforcements	Develop one standard reporting format per FBO type and cross-train all WSI's to use it.		
					Inconsistent use of contemporaneous notebooks and photo taking between inspectors (when/what triggers use)	A modernised content management system (database) that reliably accepts multiple file formats and auto-syncs		
					Recording evidence in multiple places, hard keeping track & cross referencing later	Website / FAQ resource to support FBO's self service and WSI's to signpost them to		
					Report-as-you-go solution - knit evidence strands & speed up later reporting			
					Clear and standardised guidance/training on evidence gathering & recording			