



LOBBY DIRECTOR PROGRAM TRAINING GUIDE

Office of Retail
Philatelic & Retail Services Department

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LOBBY DIRECTOR TRAINING GUIDE

FOR USE BY INSTRUCTOR/COORDINATOR

The following guidelines were developed to assist you in preparing for and conducting Lobby Director Program training. The course agenda appears on page 64.

1. Class Size

The optimum class size is from ten to thirty participants. In most cases, your first class will consist of the primary Lobby Director and their supervisor/manager, approximately fifteen of each.

Schedule a second class to train substitutes. It is best not to schedule the primary Lobby Director and the substitute on the same day, as it may create a manpower shortage at that office.

If possible, schedule the classes on two consecutive days to minimize set-up time.

2. Scheduling

When selecting dates, consider the following:

A. Room Availability

Check with your PEDC for dates that rooms are available.

B. Availability of Guest Speakers

You should arrange for high level managers to come in to show their support for the program. Start at the top, with the General Manager/MSC Manager. Then, by all means, ask the Directors City/Field Operations along with the Director of Marketing and Communications. If the local APWU strongly supports the program, consider inviting the local president to address the class. Brief your speakers and get their commitment. Assure your speakers that you only need them to speak for five minutes or less.

C. Allow Sufficient Lead Time

Allow at least two weeks advance notice of the training dates to allow for scheduling of both the lobby directors and the supervisors.

3. Announce the training schedule

Develop a letter of announcement of training. It should be signed by Directors, City and Field Operations, since the clerks and supervisors are under their supervision.

It is difficult for you and your guest speakers to be interrupted by people coming in late, but it does happen. Emphasize the importance of participants being on time and allow about fifteen minutes extra for stragglers. Tell participants to be there at 7:45, if you are to start at 8:00.

4. Arrangement of the classroom

You should inspect the room you will be using in advance. When considering room size, in addition to seating for 35 people, you will need sufficient space in the front or on the side of the room for about fifteen people to stand.

This space will be used in the afternoon for the role-play exercise. Have a few extra chairs for unexpected guests and for people who show up that are not scheduled. Tip: Provide a diagram of how you would like the room set-up to the PEDC (or to whomever will be setting the room up for you). Horse-shoe or classroom style seating is preferred. Whatever the arrangement, ensure that participants are comfortable and they have a place to write.

5. Training Equipment and Supplies

- Video Cassette Player 1/2" VHS format with large screen monitor (the larger the better)
- Flip Charts (4)
- Agendas
- Lobby Director Program Workbooks
- Training Certificates

Videotapes

- Tape No. 1 - "We Deliver" commercial
- Tape No. 2 - "Postal Service Retail Customer Perceptions and Attitudes"
- Tape No. 3 - "Lobby Director Program"
- Tape No. 4 - Bob Sommers - "Customers are People Too"
- Tape No. 5 - Bob Sommers - "Characteristics of Professional Sales People."
- Tape No. 6 - "Lobby Directors in Action"

Role-Play Props and Supplies

- Letter Scale

Prepare and affix the following labels to or write directly on the envelope or 3" X 5" card:

- Envelope "I would like to certify this."
- Envelope "I'm not sure if I want to register or certify this."
- Envelope "This absolutely must get to my sister by tomorrow!"
- 3849-B "I was waiting for this Express Mail, is it here?"

—	Box	"I certainly hope this package is going to be safe."
—	3" x 5" card	Stamps only (duplicate this label 5 times).
—	Small padded bag	"Small parcel to Hong Kong"
—	Small Padded bag	"My friend would like me to send this COD and she will pay for it on the other end."
—	3949-B	"I'm picking up a COD and paying by check."
—	Envelope	"I would like to get a Money Order. I'll be writing a check."
—	3" x 5" card	"I need something to mail this gift in."
—	3" x 5" card	Customer postage meter
—	3" x 5" card	"How do I change my address?"
—	COA Card	"I just want to turn in a change of address."
—	Vacation Hold	"I'm going on vacation" (Duplicate 3 times).
—	Small Padded Bag	"Can you tell me how much postage I need on this?"
—	PS 3849-B	Delivery notice 3849 (yellow notice) (Duplicate 5 times).
—	3" x 5" card	"Why are you on this side of the counter?"
—	PS 3849-B	"The carrier never rings the bell!"

- 3" x 5" card "Why is this line so long?"
- 3" x 5" card "I mailed a package a month ago and it was never received!"
- 3" x 5" card "I lost my money in that dumb stamp machine. This place is a rip-off!"
- Any other items you would like to include.

Necessary Forms

<u>Form</u>	<u>Number</u>
— Certified Mail	3800
— Registered	3806
— Return Receipt	3811
— COD	3816
— Insured	3813
— Express Mail Label	11A & B
— Consumer Service Card	4314-A
— Mail Loss/Rifling Report	1510
— Inter. Return Receipt	2865
— Change of Address	3575
Customs Forms	
—	2966A
—	2966B
—	C-1
— Vacation hold card	

The scale and these forms should be placed on a table designated as the work station for the Lobby Director. (Usually behind the Lobby Director during role play).

6. Refreshments/Food

Consider serving coffee and donuts for breaks and a deli style luncheon. This is a small price to pay to motivate the group. It will also make your training go more smoothly, because it is difficult to get everyone back when they leave the room for breaks or lunch.

7. Preparations

- A. Arrive at least an hour early to ensure the room is properly set-up.
- B. Schedule coffee and/or donuts to arrive at least a one half hour before the class, as this is when your first participants will begin to arrive.
- C. Check the video cassette player and tapes. Test sound so that individuals seated in back are able to hear clearly. Ensure that tapes have been rewound and will start at the right place.
Place the videotapes in proper sequence.

TIP: If possible, have an assistant on-hand to place the tapes in the player on cue.

D. Arrange Handouts

Decide how you want to distribute the handouts (agendas and Lobby Director Program workbooks). Place them at each seat. It's best to get this out of the way, rather than to wait for the time when each is used in class.

E. Greeting

Welcome each person as they arrive, and have them sign-in. Tell them, "The program will start at 8:00. Meanwhile, make yourself at home. There are donuts and coffee in the back. Please help yourself." If you are properly prepared, you will have time to do this, and it will help you relax.

About three minutes before 8:00 play videotape #1, "We Deliver" to liven-up the atmosphere.

8. Welcome

Smile, and be enthusiastic. Stand in front of the group and say:

"Welcome to the _____ Division Lobby Director Training Class! My name is _____ and we are going to have an interesting and fun-filled day learning about one of the best

methods the Postal Service has developed to give our customers the best retail service possible.

"Before we get started, I would like to cover some basic orientation points. (Paraphrase as applicable).

The restrooms are located _____. Help yourself to coffee at any time and there is no smoking in the classroom. We will be taking a break at about 10:15 and you can go to the designated smoking area located _____, for a smoke, at that time. Lunch is on us at 11:50 (if appropriate), and we'll be ending around 4:30, giving you plenty of time for a safe trip home."

9. Introduction of Guest Speakers

"Today we're going to learn how to become Lobby Directors. We have a fast-moving training session for you in which you are the main participants, and we are happy to have with us today, (applicable name),

_____ Field Division General Manager/MSC Manager and the Director of City/Field Operations, who would like to say a few words. Let's give (him/her) a big hand!"

Repeat for each succeeding speaker, outlining their functional responsibility.

As each guest speaker leaves, start clapping and say, "Thank you". When speakers are finished you can sum up their statements by saying, "As you can see, this program is supported from the highest levels in the Division/MSC. We are happy our managers see the importance of letting our customers know that we care about them, and we want to provide them with prompt, efficient service."

10. Program Overview

A. Introduction of Video # 2	"Postal Service Retail Customer Perceptions and Attitudes"
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Introduce tape as follows:

We are all aware that there is room for improvement in our retail operations. Our customers are also keenly aware of this. The video we are about to see contains excerpts from a Postal Service customer focus group. Let's hear what our customers have to say. (start video)

- B. When the video is over, lead the group in the following discussion:

"Do you think this is the way many of our customers' see the Postal Service. Have you heard these types of remarks?"
Several people will respond.

"It is difficult to listen to these types of comments without becoming defensive. However, rather than arguing about whether or not their perception is accurate, it is more important to understand that this is the way many of our customers see us. We must work on changing their perception." Note: If at any time during this discussion, the participants get off the subject by trying to place the blame somewhere else, get them back on track by saying something like: "It isn't necessarily more people (if applicable) that are needed, but the effective utilization of the people we have. That's why we are here."

C. Introduction Video #3 – "Lobby Director Program"

Introduce tape as follows:

"Now we have seen there is a need to give better service to our retail customers. In the next video we will see how Lobby Directors can change customer perceptions by providing better service. (Start video #3).

11. Introduction of Participants

(motivational icebreaker to initiate group participation)

Have participants introduce themselves as follows:

"Before we go any further, I would like to know more about you, because you are the ones this program is all about. Starting over here, please stand, tell us your name, title and office. Then tell us why you volunteered to become a Lobby Director, or if you are a manager, how you feel that the program will benefit your office."

After each participant speaks, acknowledge them with statements such as, "Very good, Great, " etc.

12. Self Affirmation

Lead group as follows:

"Please stand up and repeat after me."

I AM FRIENDLY

I AM KNOWLEDGEABLE

I AM PROFESSIONAL

I AM WELL GROOMED AND

MY UNIFORM IS IMPRESSIVE

I HAVE GOOD POSTURE

I HAVE A POSITIVE ATTITUDE & FRIENDLY MANNERISMS

I HAVE GOOD HEALTH

I AM OPTIMISTIC

I AM ENTHUSIASTIC

I AM CONFIDENT

I AM SINCERE

I AM DETERMINED

I AM DEPENDABLE

I HAVE INITIATIVE

I HAVE IMAGINATION

I HAVE MENTAL AGILITY

I HAVE SELF-CONTROL

I AM MATURE

I AM THE BEST

I'M NOT CONCEITED

I'M CONVINCED

Say: "You may be seated."

13. Introduction of video #4 – "Customers are People Too" (Segment
Objective: Building Human Relations Skills)

A. Introduce tape as follows:

"Now we are going to start developing the skills you will need to be successful Lobby Directors. The tape we are about to see will discuss customer attitudes and expectations, and what happens when we don't meet their expectations.

"But, before we view the tape, can anyone tell me, Who is our competition?"

You will probably get answers such as Federal Express, UPS, Airborne and other expedited mail services. If no one states the telephone company, newspapers or other forms of communication, follow-up with this question:

"What business are we, the U.S. Postal Service, in?"

You will probably get answers such as:

We are in the mail delivery business.

We are in business to serve the customers.

We are in business to move the mail.

If no one says communications or the business of accepting and delivering messages, follow-up with:

"That's what we do, but what industry are we in?"

If no one answers, say:

"Well wouldn't you agree that we're in the communications industry, the business of accepting and delivering messages?"

"OK then, if we are in the communications business, who is our competition?"

Prompt group for answers such as:

Private couriers such as Federal, UPS, and messenger.

Private door delivery services

Telephone company – (voice messages)

Fax Services – (electronic messages)

Newspapers – (advertising messages)

Television – (advertising messages)

Radio – (advertising messages)

Billboard – (advertising messages)

Electronic funds transfer systems

Direct deposit

Other non-message competition such as:

Mail Boxes, Etc. and other lock box and shipping
services.

American Express and other money order companies.

Stationery Stores – (packaging products)

Hobby Shops (Philatelic products)

Say:

"Keep our competitors in mind while watching the tape,
'Customers Are People, Too'. Think about how the tape applies
to our customers. Please take notes. There will be a quiz at
the end!" (START TAPE)

B. Summarize the important points detailed in the video by leading the following discussion. Ask group:

"What do customers want from us? He mentioned two categories:"

Answers:

- o They want us to be people oriented, caring and empathic.
- o They also want us to be proficient at the skills of our business.

"Turn to page 17 of your workbook. Remember the characteristics of the four types of customer service representatives?

"What type do you want to be?

"Of course, as a Lobby Director, you want to be the Quality Customer Service Representative who have the proper balance of these characteristics."

Ask someone to read the characteristics:

Timely	Friendly
Efficient	Personable
Uniform	Interested
Organized	Tactful

"When Bob talks about behavior that is rewarded is repeated, what were the four steps he said we as Quality Customer Service Representatives can use to reward our customers?"

1. Give customers your full attention.
2. Show them that you are interested.
3. Express a desire to help.
4. Demonstrate your desire by your actions.

Instructor ask: "How do you show that you are interested? Turn to page 20 in your workbooks and follow along with me under the section titled:

POSTURE OF INTEREST – (read aloud)

1. Lean your body ever so slightly toward the speaker.
2. Face the speaker squarely.
3. Maintain an open position.
4. Position yourself at an appropriate distance from the speaker.
5. Look them in the eyes.
6. Smile.
7. Arch your neck forward.
8. Avoid looking at external barriers.
9. Look interested.
10. Nod your head in agreement.

POINTS TO REMEMBER:

- o Use customers' names
- o Give customers LANYAP – that little extra
- o Be honest
- o Use the power of paraphrasing – Another technique we can use to show customers that we are listening and that we understand them is paraphrasing.

What is a paraphrase, and how do we use it? A paraphrase is one of the most difficult and least understood listening techniques. It is also a very powerful technique in developing rapport with someone.

The paraphrase is composed of four basic building blocks.

1. It is concise.
2. It reflects only the essentials of the speaker's message.
3. It focuses on the content of the message without the emotions.
4. It is stated in your own words.

14. Self-Evaluation Exercise

Lead into the self-evaluation exercise as follows:

"To improve our skills as quality customer service representatives, we need to constantly evaluate our performance. So let's take about ten minutes to complete the self-evaluation on pages 21 and 22 of your workbook. Be honest, you are the only one who will see it."

Instructor – End self-evaluation by saying:

"Complete this self-evaluation periodically to see how you are doing and in what areas you need to improve. Before you leave here today, list on page 23, at least one personal commitment to self-improvement under each heading.

15. **BREAK**– Announce exact time to be back, or they will linger.

About three minutes before you want to start play the "We Deliver" videotape. This lets them know to come back in, and warms them up again.

16. **Introduction of videotape #5, "Characteristics of Professional Sales People". (Segment Objective: Building Professional Selling Skills)**

A. Instructor – Introduce tape as follows:

"Earlier this morning we worked on developing our customer relations skills, because we are all customer service representatives. We are also salespeople. Now we are going to develop selling skills. You will need a partner for the exercise, so everyone choose a partner now.

Now Bob discusses selling skills in "The Characteristics of Professional Sales People." (Start videotape)

B. Exercise

Stop tape when Bob tells everyone to get with their partners.

Say to group: "Get with your partners, listen carefully and follow Bob's instructions for this exercise."

C. Summarize tape by recapping the major points and completing exercises in the workbook.

Ask: "What were the four characteristics of professional salespeople?"

Prompt group for the following responses:

1. Strong desire to want to help and assist other people
2. Empathy for other people
3. Resilience to bounce back from rejection.
4. Desire to accumulate specialized knowledge.

Instructor – Ask group: "Do you feel that as Lobby Director you need to possess these characteristics?"

"Let's take a closer look at a few of these characteristics."

Empathy

Sometimes it is difficult for us to empathize with our customers because we hear the same types of complaints or concerns from so many customers that it becomes routine. For example, at the first of the month when Social Security, pension and welfare checks don't arrive, we may turn a deaf ear to the customer and say, "They didn't come in, I don't know where they are or, There is nothing I can do about it."

Stop and put yourself in the customer's place. What if you lived from pay check to pay check and on payday you asked for your check, and your supervisor said, "It didn't come in, I don't know where it is, and there is nothing I can do about it." How would you feel?

If you look at the situation from the customer's perspective, you would have handled the situation differently, wouldn't you?

Although you may not be able to solve the customer's problem, you can make them feel a little better by showing that you understand how they must feel and that you care about their situation.

How could you show the customer empathy?

Prompt group for statements such as:

"I can imagine how you must feel. I'm sorry but the checks didn't come in. We contacted the Social Security Administration. They were late mailing them out ..." or state some positive action you have taken.

Resilience

You must have resilience to stay in the lobby. Customers will sometimes take their frustrations out on you. But with resilience you will be able to bounce back and remain a professional. The best source of resilience is: "Believing in your products and believing in your services".

The U.S. Postal Service is the best and largest mail service in the WORLD! It's important that you believe you offer the best service. Never make comments such as "If you think this is bad, you should see what goes on in back," or "I know those carriers are lazy, but what can I do?" We must support every aspect of the service because it is an extension of us. Pride in your service will give you confidence and resilience. Giving good service will command your customer's respect. Finally, when things do go wrong, ie., when you must deal with an difficult customer, don't dwell on it. Do the best you can, then let it go.

Desire to Accumulate Specialized Knowledge

It's the ability to give above and beyond what is required of you. This will go a long way in developing and maintaining excellent customer relations. Find out what information will be helpful to your customers in particular, such as: the location of public restrooms, public phones, and good places to eat. A medium-sized mailer may not be familiar with customer meters, or bulk mailing.

Be creative and try to anticipate their needs. If your office has frequent complaints about checks not being received, find out the procedures of the agencies for replacing your customers' checks. Just think of the relationships you can develop! Not to mention changing the perception that customers have, that we don't care.

Another way to accumulate specialized knowledge, is to become a student of retail. Study the service provided by other retailers. Whats are their positives — the things that make you want to go back? Make a list on page 31. What are the negatives? Make a list on page 32. Adapt the positives to your situation. Eliminate the negatives from your behaviour.

The Lobby is Your Stage – "Lets talk a little further about how the characteristics we just discussed are displayed when we interact with customers. At Walt Disney World, they use the term "ON STAGE".

What this means to all the employees of Disney World is: All of the park that is in the customer's view is considered "ON STAGE". The tunnel and areas under Disney World that are restricted to employees only, are considered "OFF STAGE".

Whenever a cast member (not called an employee) is "ON STAGE" he/she is always in costume (not called a uniform) and is always "in character" (i.e., playing their role). In the Postal Service, we also have a stage. It is the lobby which extends to the bafflescreen and all areas in the customer's view.

As a Lobby Director, you are an actor performing a role. When you are in the lobby, you are "ON STAGE". When you are on "ON STAGE", you, like an actor, are always in uniform and in character.

Even when you've had a bad night and a flat tire that made you late for work, the show must go on. Leave those problems backstage. Keep your sunny disposition and your smile in a special place near the door and make sure you put it on before you go "ON STAGE".

When you are on stage, the most important person in the whole world is who? **Your audience/your customer.**

Your customers should never see how bad your day has gone or know about your personal problems at home or at work, nor should they know by your reaction that they are the fourth person today, who has asked what seems like a dumb question.

17. Reading Emotions

As a Lobby Director you have many demanding roles to play. These roles will depend upon your customers' needs, wants, and emotions. You must be able to read these emotions. Turn to page 24 of your workbook and follow along with me.

There are five basic emotions a customer can express. If you can determine their emotional state and respond properly, you will be very effective at solving their problem. On the other hand, if you misjudge their emotional state, and respond improperly, troubles may abound. The following is a list of the five basic emotional states.

1. Friendly
2. Natural
3. Emergency
4. Angry
5. Overburdened

Now take a few moments to complete the exercise on page 25.

Match the emotion with the proper response.

Instructor: After the first few people look up, ask, "Is everyone finished? Do you need more time?" If anyone says yes, ask, "Are you finding it difficult to select one response for each emotion"? If they say yes, say "No one said there was only one correct response." When everyone is finished, say, "let's go through them together".

What would be the appropriate response if the customer is in the following emotional states.

<u>Emotion</u>	<u>Response</u>
Friendly?	Natural, cheerful
Cheerful?	Natural, cheerful
Natural?	Natural, cheerful
In an Emergency state of mind?	Urgency/reassurance
Angry?	Urgency/reassurance/ concern/sympathy

Instructors – Ask, "Would cheerful be an appropriate response to angry? Why not?"

Overburdened	Urgency/reassurance
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As a Lobby Director you will no doubt run into all of these emotions at one time or another. Don't be fooled by thinking that any one of your customers will not feel these emotions while they're with you. They may try to hide their feelings, but it is in your best interest to quickly identify, acknowledge and work with your customer as the situation demands.

18. Handling Complaints

This is one of the most difficult components of lobby directing, but with tact, you will be able to handle irate customers with expertise and ease. Follow these basic rules:

RULE # 1....Don't make excuses.

If there is ever a time to keep you mouth shut, it's when the customer is angry. The professional Lobby Director will approach this situation with the attitude that this is an opportunity to show how good we are. It is a challenge for me to become the hero.

If a doctor cut out your kidney rather than your appendix, would you like to hear his excuses? Will it bring back your kidney?

When a customer is angry, he is no mood to hear excuses.

RULE #2...Show your sincerity.

If a customer has a complaint about your service, he wants to talk to someone who cares. If you are sincere about his problem, let him know by listening to what he has to say. If you aren't sincere, he will call someone who is, your boss or our competitors.

RULE #3...Never belittle a customer's remark.

Sometimes our first reaction to a customer complaint is, "What's he all excited about, a lot worse things happen everyday"? Maybe that's true, but your customer considers his problem the most important thing to him at that time. That's why you must never belittle his problem. If he feels he has a big problem, you can become a big problem solver for him.

RULE # 4.. The competition is waiting.

Our competition knows as well as we do that no one is perfect. So they'll be ready to step in and take over the minute we fail to handle a complaint to the complete satisfaction of our customers. Here is a review of some basic steps to follow to keep them from calling our competition.

1. Be speedy and tactful.
2. Never argue.
3. Set their mind at ease.
4. Reach an equitable decision.
5. Follow through.

When handling complaints, use the skills you have learned today. Demonstrate a desire to help and show empathy. Offer specialized knowledge. Always remember, if a customer complains, it's important to them. Put yourself in their shoes. Look at the situation through their eyes.

There are a number of other actions you can take to make a customer feel better. For example, you can write down their name, address and phone number, speak to the carrier, or supervisor and put up a notice to watch for their mail. As a professional, you should gather specialized knowledge. In the case of the missing Social Security check that we discussed earlier, take a moment and call, for example, the Social Security or Welfare Office and find out what alternatives your customer has when a check has not been received. Some agencies offer emergency funds. Just think what this would do for an irate customer!

Another excellent tool for handling complaints is touch. This method is very effective, but should be used with care and discretion. It is known fact that a gentle touch will calm tension. Just a soft touch on the hand, arm, or perhaps the back can introduce to an irate customer a totally different level of communication. It says "I care about you." Keep in mind this method will not work for every customer.

Consumer Service Card

(Show the group the card)

Do you know what this card is? This is a Consumer Service Card, as opposed to a complaint card. This card is a useful tool for Lobby Directors and has many uses other than complaints. When you have any information to write down, it should be recorded on a Consumer Service Card. If it is simple information upon which you will follow up later with the carrier, manager or through research you will conduct, write the information on this card. It will give you all the necessary information in a well-organized manner. Remember, if a problem can't be resolved in the very same day, a Consumer Service Card should be submitted. Your customer will feel that someone is taking care of their problem. You can say something such as, "I know how important this is to you, and that's why I want to help you by taking a minute to write down everything you told me. I will make sure it gets in the right hands and that problem is corrected." By all means, do take care of the problem, because that same irate customer will be back to see you if there has been no follow-up.

Sometimes, you may have to excuse yourself when you are with a customer, and come back after you have addressed the out-of-control customer. We have a habit of punishing the irate customer because they are not acting as they should. However, it is most important to defuse this anger, because anger is contagious.

Mail Loss/Rifling Report

Show the group PS Form 1510 (tracing form).

This is another tool which should be used to help in resolving customer complaints. Remember: when handling complaints, be honest with your customers. Don't promise anything that you can't deliver. And always follow-up. When you have mastered these techniques, you will find it much easier to deal with customer complaints.

19. Role Play – Equipment and Set-Up

This segment of the training session will require advance preparation. You have allowed space to form a mock customer line which can be viewed by the entire class. Organize the props listed in section 6.

20. Lunch – Announce the exact time to be back. About three minutes before you want to start, play the "We Deliver" videotape. Note: If the class will be going out to lunch, ask them to evaluate the service at lunch. Ask a couple of people to describe the service they received at lunch.

21. Role of the Lobby Director

When the class is settled in and you have their full attention, give an overview of the role of the Lobby Director. Say: "What is the role of a Lobby Director? Please write these down.

As a Lobby Director you perform three major functions.

1. Improve the Quality of Customer Service

This is first and most important, because our main function as Lobby Directors is to improve the quality of customer service, rather than to speed up the lines. It's more important that you greet the customer and address their needs immediately than to speed them through the line.

2. Relieve Stress

You will relieve stress for the customer who enters with a problem, simply by being there to assist them. You will relieve stress for your co-workers by assisting customers in preparing their mail, and defusing their anger before they reach the window.

3. Speed-up Lines

You will speed up the lines, but that is not your first priority. Don't sacrifice dispensing good information and resolving mailing needs to move through the line rapidly.

22. Appearance – Is Important

As a Lobby Director, you are viewed as a professional. Your appearance will play a major role.

(Provide information regarding the way your division will be handling uniforms. Refer to page 12 of the workbook.)

Your make-up, hair and jewelry should be appropriate for business (conservative and neat). Your fingernails should be clean, well manicured and be of reasonable length. Your uniform should be clean and pressed. Blue jeans and tennis shoes are completely inappropriate.

When you project a confident, professional image, customers will feel confident that you will be able to help them. They will treat you as a professional.

23. Lobby Director is not an easy assignment.

Being a Lobby Director is very hard work. It may appear to be glamorous and fun, but the truth is, it is very hard work, physically and mentally. Angry customers will take their frustrations out on you and become very demanding. If hard work is not a part of your make-up, this job is not for you.

24. Lobby Director is a rewarding assignment.

Lobby Directing on the other hand can be very rewarding. If any of you have any hopes of advancing your careers, Lobby Directing is an excellent step in that direction. You are developing good human relations and communications skills. These are skills that are part of the qualifications for all EAS positions.

25. Team Work

You are encouraged to build team work. This is important because you will need the support of your co-workers to make the program work. Without their support, you are doomed to fail. The very first step you will make in putting this program into place will be to have a clerk's meeting including the Station Manager and/or supervisor. In this meeting, you should discuss your game plan for success. You should plan methods of handling packaging products, opening "Stamps Only" windows and communications between the supervisor, Lobby Director and clerks.

26. Daily Procedures

Before going out into the lobby the first thing a well-prepared Lobby Director will do is: (Show on flipchart)

A. Set up cash drawer.

You should be set-up your cash drawer as though you were going to work the window.

B. Replenish Lobby Directors supplies and refill form holders.

Lobby Director's work stations should have all necessary supplies (See page 14 of your workbook). Discuss what equipment, ie., mobile cart will be provided. Discuss the handling of packaging products.

NOTE: Packaging products should be made available to Lobby Directors. The Lobby Director can write in the upper corner the price of the padded bag or envelope to alert the clerk at the counter to charge for the item. This allows customers to prepare their mailing before they reach the window.

C. Check stamp machine.

Ensure that it is stocked and operational. Become familiar with what denominations it will take and check daily by testing it (saving stamps of course) to see that it is in good operating condition. Many times when a machine doesn't work, it is because the customer does not know how to operate the machine. If the machine is out of order, place a professional out of order sign on it and inform manager or the responsible person.

D. Police the lobby

Dispose of any debris customers may have left on writing tables, etc. Throughout the day you should give this attention.

27. When to go out in the lobby

"As a rule of thumb – Go out into the lobby when the number of customers in line exceeds two times the number of clerks serving. You, or others, may feel there are not enough clerks on the windows for you to go out into the lobby. This feeling is influenced by old habits. When there are four clerks at the window, and one clerk closes his or her window and goes into the lobby, how many clerks are serving the customers? There are still four clerks serving customers. A Lobby Director is still a window clerk, and is performing more functions than the clerk at the window."

In a busy office with four clerks, one clerk could effectively close a window, enter the lobby, and expedite every transaction by getting the customers prepared before they reach the window. As Lobby Director, you will address the line and meet the greatest demands first. This process defuses the anger of customers and eliminates unnecessary waiting for items such a vacation hold, and change of address. You will be amazed at the effect you, one person, can have on a situation like this. When you have done all that you can,

leave the lobby, return to your window and open for "All Services" or "Stamps Only".

28. Transaction Script Exercise

Ask "What are the elements of a sales transaction?"

A. Greeting

This is your initial welcome of the customer to your post office.

Make a good first impression.

Greet each customer as they come through the door or as you approach them in line.

Smile, and look each customer in the eye as you greet them using phrases such as:

"Good morning, or "Good morning Mr/Mrs/Ms (Customer's Name)", if known.

"How are you today?"

"How may we help you today?"

NOTE: Personalizing your greeting by using the customer's name demonstrates your interest in them. You acknowledge them as an individual, not just another face. Sometimes, you can spot their name on their check, letter or parcel.

B. Determining customer needs.

You determine customer needs by your observations, questions and listening to the answers.

Look for visual clues, such as the customer is carrying a parcel, letter, yellow slip, etc.

Try to assist each customer in line, regardless of whether or not the customer appears to need your assistance. This can be done by asking the customer, "May I check your mail to see if it is prepared so it will be ready to go when you reach the window? That will save you some time!" (Smile as you are speaking to the customer).

Questions should be used to obtain the information that is needed to assist the customer in selecting a product or service.

C. Suggesting

Suggesting the product or service that best meet the customers' needs.

After you identify the customer mailing needs, suggest the product or service that best meets their needs. The Lobby Director should be well-versed and prepared to give suggestions/recommendations on all the services we offer. Remain flexible in proposing solutions.

Focus on the benefits that the product or service provides to the customer rather than the features of the product or service. Tell the customer exactly how the product or service will meet their needs.

D. Overcoming objections or concerns.

The customer may be unsure of the proposed solution. By observing, questioning and listening, you can overcome these concerns.

To offset their concerns, you may need to provide additional information. Stress the benefits. Offer alternatives if necessary.

E. Value-added selling

You can add additional value to the original purchase by offering additional products or services that are linked to the original purchase. These may include:

- Return receipt
- Delivery to addressee only
- Insurance
- Additional padded bags for their office
- Stamp affixer.

F. Closing

Obtaining agreement from the customer to make the purchase.
Thanking the customer or telling them the next step, i.e., "the next available clerk will help you", etc.

G. Follow-up

If something remains unresolved, such as a complaint or inquiry, by all means follow-up.

These are the basic elements of a sales transaction. You must take your cue from the customer to know which element of the sell needs your attention.

"Let's practice developing a transaction script."

Break into four groups.

Tell groups "select a scribe."

As a group, develop a script for a good transaction for the following situations.

Group 1 – A customer is standing in line with a parcel.

Group 2 – A customer is standing in line with a letter. Note the customer doesn't know how they want to send it.

Group 3 – A customer is standing in line to return an article they purchased by mail order.

Group 4 – A customer is standing in line with a birthday present that is gift wrapped.

You have ten minutes to complete this exercise. Select a spokesperson for your group.

After ten minutes, or after all groups are finished, say: "Okay, which group wants to go first?"

Allow each group to present and critique their own script first.

Then ask: "Can you think of any ways to improve this script?"

Go through each group's script.

(Refer to the "Quick Fixes" Guide for tips.)

29. Introduction of videotape # 6 " Lobby Directors in Action"

Instructor introduces the tape as follows:

"Now that you have the tools to work with, we are going to practice applying them to everyday transactions. It will take a few days for you to become proficient at lobby directing, after that it will become a way of life to you.

To show you how quickly Lobby Directors can move a line and what they feel are the most difficult aspects of their jobs, lets take a look at some Lobby Directors in action."

SHOW VIDEOTAPE #6.

30. Role-Play Exercise

You have already set-up for the role-play during lunch.

Say: "Before we get started with the role-play exercise, take a few minutes to review the Lobby Director Evaluation on pages 47 – 50 of your workbook. It provides a summary of the duties of the Lobby Director." Allow about 5 minutes.

Say: "Now I will play the role of Lobby Director. I'll need some volunteers to act as customers."

A. Have your assistant, or someone selected from the group to help you pass out the mail props. Instruct the students as follows:

"Come up, form a line, and play the role of a customer using the information on the prop. Improvise the dialogue." The props should be divided into four categories: Irate customers, stamps only, notice left PS Form 3849-B and common transactions. These categories should be intermingled. Transactions should be introduced to focus on a specific point. For example, the Lobby Director has assessed the line and PS Form 3849-B (notice left) is the most demanding situation in line. This is what you will address, and by doing so, the line will be quickly shorten. This also applies to "Stamps Only". Irate customers are addressed immediately because they are the most demanding and visible situation at the time.

In your demonstration, try to move through the line rather than waiting in one spot for the customers to get to you. Try to size up the line and move it down dramatically to show them how effectively a Lobby Director can handle a line.

B. Participants role play as Lobby Director

After you have demonstrated the techniques, select participants to act as Lobby Directors. After each transaction, you and the audience should critique what has transpired. Emphasize that this is not a demonstration of how quickly the Lobby Director can reduce the line, but to learn how to handle typical situations. (Refer to "Quick Fixes" Guide for more details on critiquing.)

For example, in one situation the customer complains: "The carrier didn't ring the bell. I had to come all the way down here to pick up a parcel." The customer has already experienced an unfavorable situation with the U.S. Postal Service. Now we could tell this customer that they must come back, because the carrier has not returned from the route. However, there are a number of alternatives: one is to inform the customer that they can call the

station between the hours of 7:00 and 9:00 AM and request that the carrier redeliver the parcel. You could also go in the back to see if the carrier has returned with the parcel. You can take the information and see that the carrier is notified to redeliver the parcel. The point is to be creative in our solutions. Allow each Lobby Director to address two or three customers, then select another Lobby Director. Everyone in the class should have a turn as a customer or Lobby Director. If the class is smaller, everyone should have the opportunity to act as Lobby Director. You may conclude this segment when all examples have been demonstrated. You may want to go through some of them more than once for practice.

31. **BREAK** – After 1/2 hour of role-play, take a break. Announce exact time to be back, or they will linger. About three minutes before you want to start play the "We Deliver" videotape. This lets them know to come back in, and warms them up again.

Complete role-play exercise.

Say: The Quick Fixes Guide on pages 33 – 38 provides tips on handling some common transactions.

32. **Q & A** – "Are there any questions?"

33. Wrap up — Discuss program coordination as follows:

"The Lobby Director Program Team including the Area Coordinators and myself will be available to assist you, once you have implemented the program back at your office. Using the Lobby Director Evaluation, we will visit your office to observe the program in action, offer advice and assistance to you and your manager. Now, I would like you to meet the "TEAM". For the _
(AREA i.e., "Northwest Area), lets hear it for _ (NAME)_, _
(TITLE)_, _ (OFFICE)_" (Applaud and repeat for each coordinator). Area Coordinators should offer a brief message of encouragement. Offering a challenge to be better than the other areas would be appropriate to spark a competition. "Please do not hesitate to call your Area Coordinator or myself if you have any questions. Our numbers are listed on the flip chart".

34. Graduation.

Earlier today, I asked you to make some personal commitments for improvement turn to page 23. Get with the partner you had earlier. Tell your partner one of your personal commitments.

Call each participant up to the front, shake their hand, congratulate them, and present them with their certificate. A group picture would be appropriate.

LOBBY DIRECTOR QUICK FIXES GUIDE

The following are some of the ways different situations can be handled. These are suggestions, as every situation is unique just as a Lobby Director's style and the customer's personality are unique.

o Starting Out.

Anytime throughout the day, when the need arises, the Lobby Director enters the lobby. Start when the number of customers in line exceeds two times the number of clerks serving. If a line of customers is already forming, get the cart of supplies and start at the beginning of the line and greet each customer one at a time. Smile, and look each customer in the eye as you greet them using phrases such as:

"Good morning, or Good morning Mr/Mrs/Ms (Customer's Name)", if known."

"How are you today?"

"How may we help you today?"

Greet each customer as they come through the door or as you approach them in line. Try to assist each customer in line regardless of whether or not the customer appears to need your assistance. This can be done by asking the customer, "May I check your mail to see if it is prepared so it will be ready to go when you reach the window? That will save you some time!" (Smile as you are speaking to the customer).

The Lobby Director should be well-versed and prepared to give suggestions/recommendations on all the services we offer.

o Cash Management

Early in the morning when cash reserves are low, keep track of which clerks have the larger sums of cash so customers are not sent to a window with insufficient change. After finding out what the transaction will be, ask customer, "will you be paying by cash or check". If payment is by cash, ask "What amount will you be tendering?" If the amount to purchase is small and the customer has a twenty dollar bill, advise the customer which window has change available. (Note PB article 5-26-88, "Managing Cash" allows clerk(s) \$100.00 under certain conditions.)

- o **Check Approval**

If a customer is paying by check, the Lobby Director should look at the Check Register (Bad Check List).

One form of identification is necessary. Write it on the check along with your initials. The check will be pre-approved when customer reaches the window.

- o **Registered**

Determine if registered is the type of service needed (many customers don't know the difference between registered and certified). If necessary, explain both services. If the customer is sure that registered is the service they prefer, ask "would you like proof of delivery?" (explain return receipt service). The Lobby Director should ensure that the forms are completed correctly and the item is properly wrapped. If not offer necessary items to fix it.

- o **Certified**

Give the customer the necessary forms and explain the procedures for proper completion.

Make sure that the customer knows the difference between Certified and Registered. Remember: only mail bearing First Class postage may be certified. Check to see if they need proof of delivery (return receipt). Explain the options on the card.

- o **Express Mail (Mailing)**

The Lobby Director may give the customer an Express Mail label and container if necessary so that they may complete the label and prepare the mailing prior to reaching the window. If the customer is uncertain about the proper procedures for completion, the Lobby Director can assist with the preparation.

If the office has a dedicated Express Mail Window customers purchasing Express Mail may go directly to that window without waiting.

If there is no dedicated Express Mail Window, the Lobby Director should assess the line to determine how many customers are waiting to purchase Express Mail. Inobtrusively attempt to get these customers served quickly by setting up a window or opening an Express Window and accepting the mail. This may be done in conjunction with accepting stamps only transactions. Avoid causing bad feelings among other customers.

- o **Express Mail (Pick-Up)**

Just as in handling pick-up notices, the Lobby Director retrieves the item and has the customer sign for it. Check to see if others need to pick-up also.

- o **Parcels**

The Lobby Director should check the customer's parcel for proper packaging, ZIP Code and complete addresses. If the parcel needs correction, he or she may do so in line or on the rolling cart. The Lobby Director can supply any necessary equipment and instructions.

If a customer has to leave the line, the Lobby Director should speak to the person behind them and say, "This customer will be right back, will you please hold his/her place in line? Thank you!"

- o **Insurance**

Ask customer: "How much would you like to insure this for?" Explain options, limits, costs, provide forms, and assist customer in proper completion. Offer proof of delivery (return receipt).

- o **Merchandise Return Service**

Explain to the customer that no insurance is provided. Provide forms and assist the customer in the proper completion.

- o **Stamps Only**

If the office is very busy and a Stamps Only window is not already set-up, the Lobby Director should assess the line to see if several customers would like to purchase only stamps. If necessary the Lobby Directors can open Stamps Only Windows themselves.

The Lobby Director can ask the customers in line, "How many of you would like to purchase stamps only?"

The Lobby Director should not pull stamps only customers out of line and place them in front of other customers. Ask the stamps only customers to remain in line until you determine what arrangements will be made to purchase stamps only. Be alert, and try to balance it so that a customer does not end up being served later than they would have if they had remained in the regular line.

When ready, the Lobby Director can ask "Will the next person in line for stamps only, please come to the counter".

- or -

"Starting with the next customer in line, one person at a time (Please), I'm open for stamps only."

Note: If there are customers who would like to purchase just a few stamps the Lobby Director may suggest they use the vending machines.

1. Make sure the machines are operable, before the suggestion is made.
2. Know exactly what stamps are available in the machine.

o **International Mail**

The Lobby Director should check the International piece to ensure that it is properly addressed. Occasionally foreign customers reverse the FROM and TO addresses.

Check for proper custom forms and packaging.

o **C.O.D. (Mailing)**

Supply the C.O.D. forms, if necessary explain the procedure for completion.

Make certain that the customer understands that he or she must pay the C.O.D. Postage and C.O.D. Fee at the time of mailing the item.

o **C.O.D. (Pick-up)**

If a customer is in line to pick-up a C.O.D. the Lobby Director may accept checks for C.O.D.'s.

Make sure that the check is made payable to the sender of the C.O.D., not to the Postal Service.

If the customer is paying in cash, he or she remains in the line to be served by a window clerk.

Make certain that the customer knows they must:

- Pay back the C.O.D. Postage
- Pay back the C.O.D. Fee
- Pay the cost of the item.

o **Money Orders**

The only assistance the Lobby Director can provide is information on money order fees. Ensure that the customer is planning to pay in cash.

o **Packaging Products**

If a customer informs the Lobby Director that he/she would like to purchase one or more packaging products (padded bags, boxes, etc.) the Lobby Director should give the packaging products to the customers waiting in line.

o **Customer Postage Meters**

Meter Setting procedures may differ from office to office. Many offices have a designated clerk responsible for setting meters. If the urgency demands and time permits, the Lobby Director may set a meter. If you take several meters from customers who normally come back for them, let the customers know when they will be ready.

o **Refunds – Express Mail or Other**

Depending upon the type of transaction the refund is for, the Lobby Director may provide the customer with PS Form 3533 Application for Refund, so they may begin to fill in the necessary information. Check documentation.

The Lobby Director doesn't give refunds. Any customer seeking a refund remains in line (with the proper forms already completed), and waits for the next available window clerk.

If a customer is filing a claim for reimbursement on insured mail, he should remain in line to be served by a window clerk.

- o **Change of Address**

Explain the procedure for completing the form. Check it for proper completion, and make sure the effective date of the move is indicated. Take the card from the customer and make sure that the change of address card is placed in the designated area or given to a supervisor.

- o **Vacation Hold**

Check the Vacation Hold for proper completion. Verify the starting and end dates with the customer.

The Lobby Director can accept the Vacation Hold request; he or she should make sure that the request is placed in the designated area or given to a supervisor.

- o **Weighing Mail**

Have a small scale available for letters. Customers may be able to purchase stamps in vending equipment or stamps only line.

If parcel scale is available, clerk may assist in weighing parcels.

Once stamps have been applied, the Lobby Director can place the item in the appropriate hamper or hand it over to the window clerk who will place it in the designated hamper.

- o **Delivery Notice/Reminder/Receipt PS Form 3849 (Pickup Notice)**

If the Lobby Director notices that several customers have yellow slips, he/she can collect two to four notices at a time.

The Lobby Director should ask the customers to wait in a convenient place in the lobby.

- o **ZIP Code**

A parcel requires a ZIP Code. Advise customers it is a good idea to use it for all other mail too.

Sometimes customers are lost in the ZIP Code Directory, if possible, quickly explain how it is arranged with smaller cities with one code at the beginning of the state and larger cities are subsequently listed alphabetically, then by P.O. Box and street. Familiarize yourself with all the uses of the book and it will help you often.1

Lobby Director Evaluation

Post Office: _____ Date _____ Time _____

Lobby Director _____ Supv./Manager _____

General Observations

1. Is the Lobby Director in proper uniform? Is the uniform clean and pressed?
2. Is he/she well groomed?
3. Has the cash drawer been set up?
4. Has the lobby been policed to dispose of any debris customers may have left on writing tables, etc?
5. Are writing tables well-stocked with mailing forms?
6. Does the Lobby Director have a work station that is stocked with all necessary supplies (including retail products) to assist customers in the lobby?
7. Is vending equipment stocked and operational? If the machine is out of order, has a professional out-of-order sign been placed on it, and has the manager or the responsible person been informed?

COMMENTS: _____

Lobby Director Evaluation

Observations of the Lobby Director in Action

Does the Lobby Director:

1. Quickly (without asking a supervisor) go into the lobby when the number of customers in line exceeds two times the number of clerks serving?
2. Smile and greet each customer?
3. Try to assist each customer in line regardless of whether or not the customer appears to need their assistance?
4. Move down the line to assist customers rather than waiting at the head of the queue?
5. Identify customer mailing needs?
6. Recommend the services that best meet the customer's needs?
7. If necessary, explain the features and benefits of our various services to assist customers in selecting a product or service?
8. Ensure that customers have the necessary forms and that they are properly completed?
9. Check to see if parcels are wrapped properly and help customers wrap packages to meet mailing requirements?

COMMENTS: _____

Lobby Director Evaluation

Observations of the Lobby Director in Action

Does the Lobby Director:

10. Provide retail products, i.e., padded bags, boxes etc., allowing customers to prepare their mailing before they reach the window?
11. Direct customers to vending machines and to any special service window, such as Stamps Only, Express Mail, or Pick-up?
12. Answer questions?
13. Approve checks?
14. Deliver vacation hold and accountable mail to customers in the lobby.
15. Handle inquires and complaints properly?
16. Accept changes of address, P.O. Box applications and request for vacation holds?
17. Is Lobby Director confident, comfortable, and in control (Customer/Lobby Director interaction)?
18. Demonstrate patience and courtesy and respect for our customers?
19. Up-sell postal products and services as value-added services to our customers?

COMMENTS: _____

Lobby Director Evaluation

Observations of the Lobby Director in Action

Does the Lobby Director:

20. Close each transaction by thanking the customer or telling them the next step, i.e., "the next available clerk will help you", etc?
21. Follow-up, if something remains unresolved, such as a complaint or inquiry?
22. Quickly return to serving customers at the window after assisting all the customers in the lobby?

General

1. Are substitutes available to relieve the primary director for lunch, breaks and to cover off days and leave?
2. Do the director and the clerks work well together as team?

COMMENTS: _____

Recommendations: _____

Action Taken: _____

37.

LOBBY DIRECTOR PROGRAM

Training Agenda

08:00	Introduction
08:10	Opening Remarks (Motivational)
08:25	Program Overview Video – Customer Perceptions and Attitudes Video – Lobby Director Program
08:55	Introduction of Lobby Directors and Managers
09:10	Video – Customers are People Too – 30 min.
09:55	Self Evaluation
10:15	Break
10:30	Video – Characteristics of Professional Salespeople – 30 min.
11:15	Exercise on Reading Emotions
11:30	Handling Complaints
11:50	LUNCH
12:25	Role of the Lobby Director
12:50	Lobby Director Procedures, Uniform, Equipment and Supplies
1:10	Transaction Script Exercise
1:40	Video—Lobby Directors in Action
1:50	Role Play Exercises ("Quick Fixes")
2:20	Break
2:35	Role Play Continued
3:35	Q & A
4:05	Wrap-up
4:30	Dismissed

We Deliver

You know we're gonna be there,
Don't think twice,
Service is part of our name.
It's better to rely than to roll the dice;
No one else does it the same.
We're a part of the country,
A part of your town,
Faces you see everyday.
We know what we're doing,
We got it down,
We're gonna keep it that way!

We deliver, we deliver,
Through the rain and the sleet and the snow,
Like we've always done.
We deliver, we deliver,
Because the Eagle flies higher and surer
than anyone.
We deliver, we deliver,
It's the reason you trust us,
You know that we're gonna come through;
We're the Postal Service, we deliver for you!
It's part of our tradition to serve you well.
We're people who give you our best.
We're a team that's got a mission
And you can tell we'll never settle for less!

We deliver, we deliver,
Through the rain and the sleet and the snow,
Like we've always done.
We deliver, we deliver,
Because the Eagle flies higher and surer
than anyone.
We deliver, we deliver,
It's the reason you trust us,
You know that we're gonna come through;
We're the Postal Service, we deliver for you!

When your business expands,
When your family extends,
When it's Christmas next week,
When you move,
When you just want to catch up with friends,
We deliver, we deliver,
Through the rain and the sleet and the snow,
Like we've always done.
We deliver, we deliver,
Because the Eagle flies higher and surer
than anyone.
We deliver, we deliver,
It's the reason you trust us,
You know that we're gonna come through;
We're the Postal Service, we deliver for you!

— Original 2½ minute version

