

Management Instruction

Sales and Services Associate Training, Course 23501-02

This management instruction establishes policies and procedures for training employees newly assigned to sales and services associate duties. It provides guidelines for administering and conducting Course 23501-02, "Sales and Services Associate Training." This training program was created to meet the training needs of newly assigned sales and services associates, as well as window clerks in need of brush-up training. All previous courses are obsolete and must not be used.

Development

This training program was developed by Retail Workforce Strategies (RWS) and Employee Development (ED) in conjunction with the American Postal Workers Union (APWU).

Objectives

This jointly developed training is designed to provide newly assigned sales and services associates (and window clerks in need of brush-up training) with the knowledge and skills needed to perform their duties. It includes instruction in elements such as interpersonal skills, customer relations, selling techniques, postal products and services, and security of funds. The training will be administered through a classroom and a structured on-the-job training (SOJT) format. A retail coach will conduct the SOJT. (The title "retail coach" replaces "on-the-job trainer." Their duties are more clearly defined later in this document.) The retail coach will customize the SOJT portion of the training specific to the transactions indicated on the Sales and Services Unit Profile, which is a listing of possible transactions that could take place at any Retail Unit. The program helps establish and reinforce desirable work habits and commitment in the critical early stages of a new duty assignment.

Policy and Scope

All Postal Service employees newly assigned to sales and services associate duties must receive the sales and services associate training. Newly appointed craft employees are required to receive training in craft skills according to the provisions of the *Employee and Labor Relations Manual* (ELM) 715.3

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CONTENTS

Development	1
Objectives	1
Policy and Scope	1
Organizational Responsibilities	2
Retail Workforce Strategies	2
Employee Development	2
Districts	2
Manager of Training	2
Training Staff	3
Course Overview	3
Components and Time Allotted	3
Instructional Methodologies	3
Course Delivery	3
Classroom Environment	3
Structured On-the-Job Training (SOJT)	3
Training Materials	4
Recording Future Associate's Time	4
Classroom Instructors	4
Importance	4
Selection	5
Announcement and Application	5
Review and Selection	5

(continued)

CONTENTS (cont'd)

Preparation	5
Duties	5
Compensation	6
Rate	6
Mileage and Other Expenses	6
Instructor Training Time	6
Retail Coaches	6
Importance	6
Selection	6
Preparation	7
Duties	7
Compensation	7
Rate	7
Mileage and Other Expenses	7
Retail Coach Training Time	8
Quality Control	8

ACRONYMS

APWU	American Postal Workers Union
ED	Employee Development
ELM	<i>Employee and Labor Relations Manual</i>
IRT	Integrated retail terminal
PEDC	Postal Employee Development Center
RWS	Retail Workforce Strategies
SOJT	Structured on-the-job training

Organizational Responsibilities

Retail Workforce Strategies

Retail Workforce Strategies is responsible for updates and additions to the course content.

Employee Development

Employee Development is responsible for overall management of the sales and services associate training course.

Districts

Manager of Training

The manager of Training is responsible for implementing the training program and must do the following:

1. Ensure that training is administered and conducted according to policies and procedures.
2. Ensure that a Sales and Services Unit Profile is completed for each station and branch in the district.
3. Forward the Sales and Services Unit Profile to the retail coach before the future associate goes to a training unit for SOJT.
4. Coordinate the selection of the classroom instructors and retail coaches with the manager of Retail.
5. Coordinate the selection of the SOJT sites with the manager of Retail.
6. Ensure the availability of classroom instructors for sales and services associate training.
7. Ensure that work-related interruptions of future associates and instructors are avoided.
8. Support sales and services associates (and window clerks needing brush-up training) by having current materials such as manuals, handbooks, and bulletins available for employees to use at the worksite.
9. Coordinate the establishment of a rotation schedule for classroom instructors.
10. Follow procedures detailed in ELM 434.222a, 434.622e, and 438.242 when administering and conducting the training.

Training Staff

Training staffs oversee administration of the sales and services associate training. This includes observing SOJT conducted by the retail coach to ensure that it is conducted according to established policies and procedures.

Course Overview

Components and Time Allotted

The sales and services associate training consists of classroom instruction, using presentation and simulation, followed by SOJT with a retail coach. It is recommended that the SOJT immediately follow the classroom instruction, but the SOJT must be completed within 14 calendar days of the end of classroom instruction (exclusive of the future associate's scheduled leave).

Instructional Methodologies

The overall course (classroom and SOJT) includes instructional methodologies, such as presentations, demonstration, role-play, mock lobby simulation, and hands-on practices supported by audiovisuals and print materials.

Course Delivery

The classroom course is designed to deliver the basic training that sales and services associates need prior to their required SOJT (or that window clerks need for brush-up training). SOJT processes are included to address the needs of specific offices. The order in which the processes are presented may be changed to accommodate local needs.

Classroom Environment

The classroom environment should simulate equipment and materials used on the job. Mock use of retail equipment and peripherals are designed to reproduce behavioral processes that sales and services associates need to perform their duties.

Structured On-the-Job Training (SOJT)

SOJT must take place in an office where the postmaster level is equal to or greater than an EAS-21 ranking. Each SOJT site should have *a minimum of three fully equipped retail service counters that can adequately accommodate the SOJT experience without negatively impacting service to retail customers, regardless of the level of the office.* Any office, station, or branch selected to conduct the SOJT portion of the training should have sufficient customer volume to provide all the trans-

actions that the future associate will be required to know in order to be proficient in his/her bid or assigned retail office. Due to the deployment of POS ONE, if a district has lower-level offices below EAS-21 that meet the operational minimum of three fully equipped retail service counters and sufficient customer traffic, they can be used as training sites to accommodate integrated retail terminal (IRT) SOJT.

Note: If the future associate's bid or assigned retail office does not meet the operational minimum of retail counters or customer traffic, the SOJT does *not* have to take place in that office. The future associate's SOJT can be conducted at another office better equipped or staffed to meet the future associate's training needs. However, the retail coach at the training office must customize the SOJT portion of the training specific to the transactions indicated on the Sales and Services Unit Profile of the future associate's bid or assigned retail unit. The unit manager/postmaster and the retail coach should complete the Sales and Services Unit Profile together. This profile should be on file in the unit prior to the sales and services associate's arrival at the unit for training.

Training Materials

An Administrator's Guide, a Facilitator's Guide, and an Associate's Workbook must be used to conduct this program.

Recording Future Associate's Time

Record the future associate's time as follows:

1. Record all time in class and charge the training hours to the gaining retail unit.
2. Record all time spent in SOJT performing duties required to learn the processes specific to the unit where the sales and services associate will be assigned, and charge the training hours to the gaining unit. (See Handbook F-21, *Time and Attendance*, 424.71.)

Classroom Instructors

Importance

The success of the sales and services associate training course depends on the professional integrity and high caliber of the instructors chosen to conduct the classroom sessions. An adequate cadre of certified instructors must be maintained so instructors are available to support the training requirements.

Also, because of their classroom experience, instructors will be able to serve as qualified retail coaches when vacancies or absences occur.

Selection

Announcement and Application

As classroom instructors are needed, ad hoc duty assignments should be posted. All postings should be posted and filled in accordance with the APWU National Agreement. All sales and services associates and window clerks who have 1 year of continuous retail experience and who hold a retail duty assignment at the time of consideration are eligible to apply.

Review and Selection

The manager of Training along with the manager of Retail, or their designees, will select instructors. They should select enough instructors to allow training responsibilities to be rotated. Selected classroom instructors must successfully complete "Facilitative Instructor Workshop," Course 21258-00, and "Job Instructor Training," Course 23501-01.

Preparation

It is essential that the classroom instructor be provided adequate on-the-clock preparation time to successfully fulfill their responsibilities.

Duties

Classroom instructors must do the following:

1. Review the training materials. To conduct successful training sessions, instructors must be familiar with the training materials, retail equipment, and instructional methods used.
2. Ensure that all materials are current and available. When handouts and reference materials are needed, the instructor is responsible for having them ready to use and/or distribute.
3. Refer to the instructions in each module to determine needed classroom equipment and support materials and put them in place before class begins.
4. Provide the necessary learning experiences that actively engage the future associates through adult learning techniques such as role-playing, hands-on simulations, etc.
5. Help update and maintain sales and services associate training materials by using the current directives.

Compensation

Rate

Sales and services associates or window clerks performing the duties of classroom instructor in a sales and services associate training academy are paid in accordance with current policies and procedures.

Mileage and Other Expenses

Appropriate reimbursement for lodging, per diem, and travel is authorized in accordance with Handbook F-15, *Travel and Relocation*, and ELM 716. To claim reimbursement for any travel expenses incurred, classroom instructors must use PS Form 1164, *Claim for Reimbursement for Expenditures on Official Business*. If an overnight stay is required, classroom instructors must use PS Form 1011, *Travel Advance Request and Itinerary Schedule*, to get an advance, or PS Form 1012, *Travel Voucher*, to claim reimbursement for expenses incurred.

Instructor Training Time

When sales and services associates or window clerks are assigned a full workday in other than the sales and services associate training academy, their time must be recorded to the proper operation and pay location.

Retail Coaches

Importance

Training of new sales and services associates (or window clerks in need of brush-up training) by retail coaches in a retail unit further reinforces classroom-training concepts.

It also provides retail coaches with experiences that would enable them to serve as classroom instructors when vacancies or absences occur. To serve as classroom instructors, they must successfully complete (and receive certification from) "Facilitative Instructor Workshop," Course 21258-00.

Selection

The manager of Training, along with other appropriate managers, will select a cadre of retail coaches. Sales and services associates and window clerks who have 1 year of continuous retail experience and who hold a retail duty assignment at the time of consideration are eligible to apply. Before conducting SOJT, they must successfully complete (and receive certification from) "Job Instructor Training," Course 23501-01.

Preparation

It is essential that a retail coach be provided adequate on-the-clock preparation time to successfully fulfill his/her responsibilities. A retail coach must have a general knowledge of the Facilitator's Guide from the "Sales and Services Associate Training," Course 23501-02, and the current SOJT training worksheets. The SOJT worksheet (PS Form 2528, *Window Clerk's On-the-Job Training Evaluation*) may be found in the appendix section of the associate's workbook.

Duties

A retail coach must do the following:

1. Review the Sales and Services Unit Profile of the future associate's assigned retail unit to determine the required training worksheets to be used.
2. Review the training worksheets. To conduct successful SOJT sessions, a retail coach must be familiar with the training materials, retail equipment, and instructional methods used.
3. Ensure that all materials are current and available. When handouts and reference materials are needed, the retail coach is responsible for having them ready to use and/or distribute.
4. Refer to the instructions in each training worksheet to determine needed equipment and support materials and put them in place before the future associate arrives at the unit for SOJT.
5. Provide the necessary learning experiences that actively engage the future associates through adult learning techniques such as role-playing, hands-on simulations, etc.
6. Help update and maintain sales and services associate materials by using the current directives. Sales and services associates or window clerks serving as retail coaches must use the training worksheets to guide them in conducting the SOJT.

Compensation

Rate

Sales and services associates or window clerks performing the duties of a retail coach are paid in accordance with current policies and procedures.

Mileage and Other Expenses

Appropriate reimbursement for lodging, per diem, and travel is authorized in accordance with Handbook F-15, *Travel and Relocation*, and ELM 716. To claim reimbursement for any travel expenses incurred, retail coaches must use PS Form 1164, *Claim for Reimbursement for Expenditures on Official Business*. If an overnight stay is required, retail

coaches must use PS Form 1011, *Travel Advance Request and Itinerary Schedule*, to get an advance, or PS Form 1012, *Travel Voucher*, to claim reimbursement for expenses incurred.

Retail Coach Training Time

When a retail coach is assigned a full workday of sales and services associate coaching duties, his/her time must be recorded to the proper training operation and pay location.

Quality Control

The district training staff, RWS, and ED are to monitor the quality control and follow-up of these essentials for sales and services associate training.