UNITED STATES
POSTAL SERVICE

Sales and Services Associate Training

Administrator's Guide

Course # 23501-02
NSN #7610050000333

January 2000

EMPLOYEE RESOURCE MANAGEMENT
EMPLOYEE DEVELOPMENT AND
RETAIL WORKFORCE STRATEGIES

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United States Postal Service
Employee Development and
Retail Workforce Strategies
475 L'Enfant Plaza SW
Washington DC 20260-4215

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A Commitment to Diversity

The Postal Service is committed to fostering and achieving a work and learning environment that respects and values a diverse **workforce**. Valuing and managing diversity in the Postal Service means that we build an inclusive environment that respects the uniqueness of every individual and encourages the contributions, experiences and perspectives of all people.

It is essential that our work and learning environments be free from discrimination and harassment on any basis.

In our classrooms, on the workroom floor, in casual conversation and in formal meetings, employees and faculty are asked to encourage an open learning environment this is supportive to everyone.

Course materials and lectures, classroom debates and casual conversation should always reflect the commitment to safety and freedom from discrimination, sexual harassment and harassment on any prohibited basis.

EAS Staff has a professional obligation to provide a safe, discrimination free and sexual harassment free learning environment. Instructors are expected to support this commitment. Class participants are asked to support the goal of zero tolerance of behavior that violates these commitments.

If you find course material that is presented in the classroom or in self-instructional format that does not follow these guidelines, please point that out to the instructor as well.

If classroom discussions do not support these principles, please point that out to the instructor as well.

Diversity is a source of strength for our organization. Diversity promotes innovation, creativity, productivity and growth, and enables a broadening of existing concepts.

The Postal Service's policy is to value the diversity of our employees, customers and suppliers; to do what is right for our employees and the communities we serve, thereby ensuring a competitive advantage in the global marketplace.

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U.S. Postal Service Policy on Diversity

It is the policy of the U.S. Postal Service to value and manage the diversity of our employees, customers, and suppliers by doing what is right for our employees and the communities we serve, thereby ensuring a competitive advantage in the global marketplace.

Diversity in the U. S. Postal Service is defined as the mixture of differences and similarities of our employees, customers, and suppliers. Simply stated, valuing and managing diversity in this organization means that we will build an inclusive environment that respects the uniqueness of ***every*** individual and encourages the contributions of people from different backgrounds, experiences, and perspectives.

Diversity is key to our corporate success because it affects every aspect of our organization: employees, customers, and business. The strategic advantage of investing in a strong diversity program is the creation of a positive work environment that recognizes the contributions of all employees with diverse backgrounds.

We will focus on diversity in our recruitment, selection, and retention of employees. When developing succession plans and making promotions, we will strongly support diversity, thereby creating an even playing field for all employees. To ensure that we meet the needs of our diverse customers, we will eliminate barriers and create products and services relevant to our diverse communities with a goal of increasing customer satisfaction ease of use and revenue. We will ensure that all suppliers have the opportunity to compete for our contracts, and that our local purchasing policies support the local business community and encourage economic development of all diverse groups.

All employees share responsibility for achieving our diversity goals. For diversity to be successfully integrated, diversity initiatives must continue to be guided by leadership's full commitment. All executives, managers, and supervisors are responsible and accountable for managing and integrating diversity into our business management process.

To build mutual respect into all of our relationships, employees at all levels must get involved and participate by valuing the differences and cultures of others as well as their own. This will require mutual adjustment and understanding. These actions are critical to diversity becoming an integral part of the organization and benefit not only the individual but, ultimately, the our national and global marketplace.

To achieve the maximum success in each of our corporate goals, diversity must be afforded the same focus as the key indicators under the *CustomerPerfiect!* $_{sm}$ umbrella. To create the required balance between employee satisfaction and customer satisfaction, we must employ strategies and values that promote fairness and opportunities, instill pride, and enhance safety in the workplace.

Together we can ensure that every decision we make will support a diversity plan that benefits our employees and the communities we serve in a way that allows the U.S. Postal Service to achieve maximum corporate success and positive recognition as a world-class business leader.

William J. Henderson, Postmaster General, CEO
Postal Bulletin 21978, 8-27-98

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Use of Training Materials

These training course materials are intended to be used for training purposes only. They have been prepared in conformance with existing USPS policies and standards and do not represent the establishment of new regulations or policies.

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U.S. Postal Service Policy on Sexual Harassment

The U.S. Postal Service is committed to providing a work environment free of sexual harassment.

Sexual harassment is improper and/or unlawful conduct that undermines the employment relationship as well as employee morale. Examples of such harassment include, but are not limited to, the following:

- Making or threatening to make employment decisions based on an employee's submission to or rejection of sexual advances or request for sexual favors.
- Deliberate or repeated unsolicited remarks with sexual connotation or physical contacts of a sexual nature that are unwelcome to the recipient.
- A sustained hostile and abusive work environment so severe and pervasive that it interferes with or changes the conditions of one's employment.

Employees who engage in sexual harassment will be subject to disciplinary action, up to and including removal.

If an employee engages in inappropriate conduct in the workplace, it may also violate the Postal Service's standards of conduct. Disciplinary action may result even if the conduct is not sexual harassment under the law.

All managers and supervisors are responsible for preventing sexual harassment in the workplace and must respond promptly when they learn of any conduct that may be sexual harassment. Managers and supervisors must see that a prompt and thorough investigation of the conduct takes place. If sexual harassment is found, they must take prompt and appropriate remedial action.

Postal Employees who believe that they are the victims of sexual harassment should bring the situation to the attention of any supervisor or manager, or to Human Resources.

In addition, employees can seek relief through the Equal Employment Opportunity (EEO) complaint process, grievance arbitration procedures for bargaining unit employees under the collective bargaining agreements, and the grievance procedures, where appropriate, under the ELM for applicable nonbargaining employees. If pursuing an EEO complaint, you must contact an EEO counselor within 45 days of the act(s) giving rise to your claim in order to preserve your rights under federal law.

Report any possible criminal misconduct to the Postal Inspection Service.

The U.S. Postal Service will not tolerate sexual harassment.

William J. Henderson, Postmaster General, CEO
Postal Bulletin 21978, 8-13-98

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PREFACE

The Sales and Services Associate Training is the result of a Labor/ Management Study Team's efforts to improve training for Sales and Services Associates. The team consisted of experienced classroom window academy trainers from across the country, representatives of the American Postal Workers Union (APWU), and managers/ supervisors from the field and USPS Headquarters offices.

The 1999 revision reflects the continued collaboration of the American Postal Workers Union with postal management in providing current and effective training for new Sales and Services Associates.

This course is designed to provide Sales and Services Associates with the basic skills and knowledge to perform the duties of their positions. The course is also designed to provide Sales and Services Associates and Window clerks with refresher training.

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ADMINISTRATION

Course Purpose

These instructions are designed to provide USPS managers, training staff, functional instructors, and other field personnel with the policies and procedures for administration of Course
#23501-02: Sales and Services Associate Training.

The success of this course requires the cooperative efforts of Headquarters and Area officials, District managers, the American Postal Workers Union (APWU), Retail Managers, Training Managers, Operations Managers/Supervisors, Sales and Services Associates, and Window Clerks. These instructions are designed to enhance the effectiveness of these cooperative efforts.

Course Objectives

The course is designed to provide Sales and Services Associates and Window Clerks with the knowledge and skills to effectively and efficiently perform their retail responsibilities. The course also provides the information needed to pass the end-of-training qualifying examination, in accordance with the terms of the National Agreement. The course administrators and instructors should study the National Agreement, Article 37.3.F.7, Article 37.1.L, and Memoranda of Understanding to ensure that the training is conducted in accordance with the policies contained therein. This training is required for the following positions:

- Window Clerk (KP-0013)
- Distribution and Window Clerk (SP-2001)
- Distribution, Window, and Markup Clerk (SP-2629)
- Sales, Services and Distribution Associate (SP-2320-0003)
- Sales and Services Associate (SP-2320-0001)

Successful completion of the training and passing the qualifying examination is also required for part-time flexible employees assigned to these duties. Individual modules of this training program may be used to provide window clerks, or other employees as appropriate, with brush-up training.

This program will provide a basic working knowledge of customer relations and selling techniques, financial procedures and responsibilities, and postal products and services to Sales and Services Associates. Given the various duties performed by postal personnel at retail counters, other training may be required in addition to this program. Retail employees assigned to postal stores will need to take Postal Store training. Retail employees who will accept bulk mailings should take appropriate modules of the Standard Mail Classification Training Program, course number #31545-00. Retail employees who will not only accept claims, but who will process claims as well, should take the appropriate module of the Standard Mail Classification Training Program, course number #31545-00.

Course Structure

The Sales and Services Associate Training program, which is designed for delivery through the PEDC network, is a combination of five days of classroom instruction followed immediately by a structured on-the-job training (SOJT) training experience. The classroom course provides training on those elements common to all Sales and Services Associates such as customer relations and selling techniques, postal products and services, and financial procedures and responsibilities. Modules are presented in the retail academy that consists of a classroom environment as well as a mock lobby with simulated work stations. Instructional methodologies include demonstration, simulation, role play, hands-on practice, video, presentation, and reading.

The mock lobby should simulate the job environment: the equipment (i.e., IRT, PVI, POS ONE, etc.) and materials (i.e., stamp stock and credits, currency) utilized on the job should be available for training in the retail academy. The purpose of the mock lobby is to familiarize future Associates with the actual work environment and to replicate as closely as possible in the training activities those behaviors that are necessary for Sales and Services Associates to successfully perform their duties. Local offices will determine the location and type of simulation they will use. For example, field offices have renovated stations for mock academies; used stations/branches, created classrooms with mock lobbies, or designed various modified simulated environments.

Once the classroom training portion is completed, Retail Coaches will then provide structured on-the-job training (SOJT). It is recommended that the SOJT immediately follow the classroom instruction. The SOJT must be completed in no more than 14 calendar days. The 14-day time period does not include scheduled leave of the future Associate.

The structured on-the-job training (SOJT) moves the future Associate to a designated retail training site where they then work with a Retail Coach in a live environment. During this time, the Retail Coach will focus upon completing the lesson plans selected from the Sales and Services Unit Profile. Once the core lesson plans are completed, the future Associate is eligible to take the qualifying examination. (Refer to Figure I for a graphic representation of the training process.)

Figure I

Sales and Services Associate Training Process Flowchart

Classroom Training

- Structured
- Scenarios
- Interaction
- Videos
- Hands-on with retail equipment
- Job aides

SOJT

- Live at designated retail training site
- Some training completed using live customer transactions
- Some training completed using role-play with the Retail Coach
- One-on-one with Retail Coach
- Scored by Retail Coach

Structured On-the-Job instruction Subjects based upon Sales and Services Unit Profile

Selection of Classroom Instructors and Retail Coaches

The careful selection of craft employees as Classroom Instructors and Retail Coaches is critical to the success of the Sales and Services Associate training program.

These instructors must voluntarily accept the assignment. Therefore, any changes in schedules to perform instructor duties will be considered voluntary and not subject to out-of-schedule premium. As ad-hoc Classroom Instructors are needed, positions must be advertised. Classroom Instructor volunteers may be selected from appropriate offices at the discretion of the district training office. This decision should take into account availability of instructors, commuting distance to the classroom, interaction between the classroom instructor and the district training office, and overall business and cost considerations. If local offices fail to produce a suitable number and caliber of classroom instructor volunteers, the area of coverage may be expanded to fill the necessary classroom instructor needs. Regardless of the actual selection process, Classroom Instructors must successfully complete the Facilitative Instructor Workshop, Course #21258-00.

It is essential that selected instructors be provided adequate on-the-clock preparation time to successfully fulfill their responsibilities. Some of these duties include setting up and maintaining retail training academies; familiarizing themselves with instructional materials, including videos; ordering and stocking necessary manuals, handbooks, forms, and other directives; incorporating procedural and policy changes into the training materials, etc.

The primary classroom instructors for Sales and Services Associate Training, should be selected on a voluntary basis from the following retail experienced positions:

- Lead Sales & Services Associate, PS-6;
- Sales, Services and Distribution Associate, PS-5;
- Sales and Services Associate, PS-5.
- Window Services Technician, PS-6;
- Clerk, Finance Station, PS-6;
- Window Clerk, PS-5;
- Distribution and Window Clerk, PS-5;
- Distribution, Window, and Mark-Up Clerk, PS-5

The instructors must have one year of continuous retail experience and hold a retail duty assignment at the time of consideration. To maintain retail proficiency, they must spend a minimum of 40 hours in their regular retail duty assignment once every four months. In addition, classroom instructors must return to their full-time retail assignment during the month of December to assist operations during the holiday mailing season.

The Retail Coaches must be selected on a voluntary basis from the following retail experienced positions:

- Lead Sales & Services Associate, PS-6;
- Sales, Services and Distribution Associate, PS-5;
- Sales and Services Associate, PS-5;
- Window Services Technician, PS-6;
- Clerk, Finance Station, PS-6;
- Window Clerk, PS-5;
- Distribution and Window Clerk, PS-5;
- Distribution, Window, and Mark-up Clerk, PS-5

Retail Coaches must have one year of continuous retail experience and hold a retail duty assignment at the time of consideration. In some voluntary cases, Retail Coaches may go on-site to conduct SOJT.

In addition to possessing appropriate experience, Classroom Instructors and Retail Coaches should be articulate, enthusiastic, and personable. They should exhibit behaviors expected from role models. Since both Classroom Instructors and Retail Coaches may represent the Postal Service to the public, they must exemplify adherence to the current official U.S. Postal Service uniform policy. Instructors must be in full uniform when conducting Sales and Services Associate Training. Classroom Instructors and Retail Coaches must be neat and presentable in their personal appearance. And, since instructional duties often require employees to work in close proximity, they must maintain a high level of personal hygiene.

Once selected, Classroom Instructors and Retail Coaches must be trained in instructional methods and coaching skills before they are utilized as trainers. Selected Classroom Instructors must successfully complete Facilitative Instructor Workshop, Course #21258-00. Retail Coaches must complete the JIT, Course #23501-01. Upon the recommendations and approval of the Manager, Training, the employee is issued a certificate of completion of training.

SAMPLE POSTING FOR POSITIONS

JOB ANNOUNCEMENT

AD-HOC RETAIL SALES & SERVICES CLASSROOM INSTRUCTOR POOL POSITIONS

The following job announcement for Retail Sales and Services Associate Classroom Instructor positions is being posted for volunteers. This represents a unique job opportunity for retail employees. The selection of Classroom Instructors will be from a pool of volunteers. Therefore, any changes in schedules to perform instructor duties will be considered voluntary and not subject to out-of-schedule premium.

The Classroom Instructors will be selected from offices and installations within a reasonable commuting distance to the Retail Training Academy site. If the area of consideration fails to produce a sufficient number of qualified retail employees, then it will be expanded. The instructors must spend a minimum of 40 hours in their regular duty assignment every four months.

Instructors qualifying for a uniform allowance must be in full uniform at all times while training.

Experience Requirements: Successful instructors must have one year of continuous retail experience and hold a retail duty assignment at the time of consideration:

- Lead Sales & Services Associate, PS-6 (SP-2320-0004)
- Sales, Services & Distribution Associate, PS-5 (SP-2320-0003)
- Sales and Services Associate PS-5 (SP-2320-0001)
- Window Services Technician, PS-6 (SP2-388).
- Clerk, Finance Station, PS-6 (SP2-20).
- Window Clerk, PS-5 (KP-13).
- Distribution and Window Clerk, PS-5 (SP2-1).
- Distribution, Window, and Mark-up Clerk, PS-5 (SP2-629).

Successful ad-hoc Classroom Instructors and Retail Coaches are paid at the PS 6 rate, if they are currently PS 5.

Basic Function: Instruct new and incumbent Retail Sales and Services Associate trainees in customer relations, marketing and selling techniques, financial transactions, and postal products and services. The course is presented in a classroom environment using instructional methodologies such as presentations, demonstrations, role-play, simulation, presentations, and hands-on practice and is supported by audiovisuals and printed materials.

Classroom Instructors Announcement: 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 with one year of continuous retail experience and holding a retail duty assignment at the time of consideration are eligible to bid.

Review and Selection: Each volunteer must complete PS Form 1717, Preferred Assignment Multiple Bid Card. The selection will be based on a combination of the employee's years of retail experience, and the successful completion of the Facilitative Instructor Workshop.

Employees bidding for this position are notified of the intention to use information contained in official records available as of the closing date to determine qualification. If available evidence of your qualification is incomplete, please take action to provide the Manager, Training and or the Manager, Retail with the appropriate information to update our records prior to the bid closing date. To allow training responsibilities to be rotated, enough instructors should be selected. Selected Classroom Instructors must successfully complete Facilitative Instructor Workshop, Course #21258-00.

Retail Coach Selection: The Manager, Training, along with other appropriate Managers will select a cadre of Retail Coaches. Sales and Services Associates, and Window Clerks must successfully complete the Job Instructor Training, Course #23501-01 to qualify. Sales and Services Associates and Window Clerks must have one year of continuous retail experience and hold a retail duty assignment at the time of consideration to be eligible for selection.

Employees volunteering for this position are notified of the intention to use information contained in official records available as of the closing date of this posting to determine qualification. If available evidence of your qualifications is incomplete, please take action to provide the Manager, Training with the appropriate information to update our records prior to the bid closing date. (EL-311, Section 525.12)

Program Responsibilities

Manager, Training

Before the Training

- Select, train, and certify Classroom Instructors and Retail Coaches in cooperation with functional managers. An adequate number (cadre) of certified Classroom Instructors and Retail Coaches must be maintained so that instructors will be available if the need arises for a replacement. The success of the Sales and Services Associate Training program will depend upon the professional integrity and high caliber of the Classroom Instructors and Retail Coaches who are selected and permitted to conduct the sessions as outlined in this Administrator's Guide.

- Coordinate with finance and retail operations designees the ordering and maintaining of stamp stock and credits for the training process. Note: Offices may obtain stamp credits for training purposes through the Postage Withdrawal procedures. See Handbook, F-1, Part 455, or by working with the local Stamp Destruction Committee.

During the Training

- Invite the installation head/designee to "open" the class session to show local management's commitment to Sales and Services Associate Training. Such participation adds credibility to the program.

- Prepare class rosters and complete PS Form 2432, Individual Training Progress Report. Class rosters should contain the start date, program number and title, instructor's name, program length, and location. The roster should be completed during the first day of the class.

Note: Future Associate absence during the classroom portion of the training program, while undesirable, may occasionally be unavoidable. If a future Associate misses two or more days of classroom training, the future Associate should be removed from the training and rescheduled. Absences from the classroom of less than two days and absences from the Retail Coaching portion will require make-up time: the program should be lengthened by the amount of time missed. If the future Associate withdraws, handle this according to Article 37.3.F.7. of the National Agreement.

- Maintain quality control of the Classroom Instructors and Retail Coaches. The successful delivery of Sales and Services Associate Training depends jointly upon the integrity of the training materials and the professionalism of the instructors and the support of functional managers. Quality control and follow-up will be monitored by the training staff, functional managers, and Employee Development.

- Prepare Form 2548, Individual Training Record, as soon as the names and Social Security Numbers of the scheduled future Associates are available.
- Ensure that instructors review training materials and use Postal Bulletins and/or manuals to temporarily update training materials as needed. Revised material will be periodically distributed to the District Training Offices from Employee Development and from the Market Basket Web site located on the Retail Web page.
- Oversee the administration of the Sales and Services Associate training. This responsibility includes coordinating with the appropriate managers the resources needed to administer and conduct the training. The course must be administered according to the guidelines in the National Agreement and in this Administrator's Guide. When part-time flexible (PTF) employees are assigned retail duties, they will be subject to the same qualification procedures as employees who bid for retail duty assignments.
- Within six months of selection, Classroom Instructors and Retail Coaches must attend and/or observe at least one 40-hour classroom session of the Sales and Services Associate Training program. This will help update the instructors' technical and instructional skills, as well as address any issues concerning elements of the course.

Classroom Instructors

Before the Training

- The instructors will need 8-hours of prep time before future Associates report to training.
- Thoroughly review the training materials. In order to conduct a successful training session, it is essential that the instructor be familiar with the training materials and instructional methods used. Classroom Instructors and Retail Coaches must observe and/or take the classroom portion of the training to become thoroughly familiar with the content and lesson plans.
- Ensure all materials are current and available. When handouts and reference materials are needed, it is the instructor's responsibility to have them ready to use and/or distribute.
- Arrange the classroom so that it can comfortably accommodate the number of scheduled future Associates.
- The room should be well-lighted and sufficiently ventilated.

During the Training

- Refer to instructions in each module to determine classroom equipment and support materials that are needed and put them in place before the start of the class.
- Provide the necessary learning experiences.
- Prepare class rosters for Sales and Services Associate Training. The roster must be completed during the first day of class. If a future Associate leaves the class after the roster is completed, it is the Classroom Instructor’s responsibility to notify the PEDC.
- Maintain a positive attitude. This training represents a corporate commitment to the training and development of retail employees. Therefore, a major element in ensuring the success of this national program is instructors who demonstrate the principles of effective interpersonal behavior.
- Classroom Instructors, as well as Retail Coaches, must exhibit exemplary behavior in presenting a professional appearance. Adherence to the official Postal Service uniform policy is essential. Instructors and Coaches qualifying for a uniform allowance must be in full uniform at all times while training. In addition, since Classroom Instructors and Retail Coaches must work in close proximity to trainees, high standards of personal hygiene must be maintained.

After the Training

Assist in updating and maintaining all training materials. Suggestions and recommendations concerning the training materials may be sent in writing to Employee Development, Room 1P650, Postal Service Headquarters, 475 L’Enfant Plaza, SW, Washington, DC 20260-4215

Retail Coaches

Before the Structured On-the-Job Coaching Begins

- Review the Sales and Services Unit Profile of the future Associates assigned retail unit to determine the required Training Worksheets to be used during the Retail Coaching sessions.
- Review the Training Worksheets. To conduct successful structured on-the-job training sessions, a Retail Coach must be familiar with the training materials, retail equipment, and instructional methods used.
- 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.

- Solicit support from the other retail employees in the office or station. Retail employees and the Retail Coach may want to coordinate their customer service efforts to provide the trainee with the widest variety of customer transactions possible. When possible, customers should be directed to the future Associate, especially when the customer needs to conduct a transaction that is on the Sales and Services Unit Profile.
- 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 in the retail unit for structured on-the-job training.
- Retail Coach must be present during initial assignment of fixed credit or cash till of future Associate.

During the Training

- Provide the necessary learning experiences that actively engage the future Associates through adult learning techniques such as demonstration, role-playing, hands-on simulations, etc.
- Accurately maintain and document all necessary training records as lesson plans are completed.
- Maintain communication with the postmaster or station manager regarding the future Associate's progress.
- Maintain an upbeat and positive attitude while working with the future Associate.

After the Training

- Complete and sign all necessary paperwork and documentation which includes:
- Structured On-the-Job Training Worksheet
- PS Form 2528, Structured On-the-Job Training Certification
- PS Form 2432, Individual Training Progress Report
- Follow all local guidelines and procedures to promptly submit all required paperwork.
- Help update and maintain Sales and Services Associate Training 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 structured on-the-job training.

Manager, Retail (or Designee)

Before the Training

- Assist Managers, Training in obtaining the retail equipment, meters, scales, stamp credits, and other items needed to implement and maintain the mock lobby. Setting up and maintaining the mock lobby should be a joint venture between Human Resources and Retail Operations.
- Coordinate with the Manager, Training (or designees) the selection of structured on-the-job training sites.
- Coordinate with the Manager, Training, careful selection of Classroom Instructors and Retail Coaches. The instructors and coaches should be role models for new Sales and Services Associates.
- Instructors must be provided 8-hours of prep time before the future Associates report to training.

During the Training

- Support the PEDC staff which includes providing supplemental materials, manuals, Retail Coaches, and guest subject matter experts, to ensure that local policies, procedures, and issues are addressed in the Sales and Services Associate Training program.
- Assist the training specialists in ensuring that the training is administered and conducted according to these guidelines and postal policies and procedures.

After the Training

- Reinforce skills and knowledge by helping to apply newly acquired skills on-the-job.
- Support Sales and Services Associates and Window Clerks by providing additional training experiences, having reference materials, such as manuals, handbooks, and bulletins available for them to use.
- Have job aids available at work sites to help keep Sales and Services Associates current on postal products and services.
- Update Sales and Services Associates on any changes in policies and procedures that involve postal products and services and/or retail operations.

The above strategies are essential to help Sales and Services Associates be successful in their positions after completing the training.

Future Associate's Manager/Postmaster

Before the Training

- Coordinate with the District Training Office or the servicing PEDC to schedule and notify the future Associate of the scheduled training session.
- Explain travel policy and procedures to the future Associate. Assist the future Associate in securing any driving directions, overnight lodging, or air travel arrangements.
- Thoroughly review the course objectives with the future Associate before the beginning of the classroom training.
- Thoroughly review and carefully complete the Sales and Services Unit Profile. Managers may obtain a copy of the Sales and Services Unit Profile at the Market Basket Web site located on the Retail Web page (usps.retail.com) or by contacting their respective Classroom Instructor. This profile will determine which job lesson plans are to be taught at the completion of the 40-hour classroom portion by the Retail Coach with the future Associate during the structured on-the-job training process.

During the Training

- Ensure that equipment and supplies are ordered and on-hand for the newly trained Sales and Services Associates once they return to the office.

After the Classroom Training

- Retail Coach must be present during consignment of accountability to newly trained Sales and Services Associate upon return to the office.

Subject Matter Experts and Guest Instructors

Subject matter experts or guest instructors may be used, if possible, to make presentations to support the following modules:

- Module 6: Customer Relations
- Module 19: Security and Sanctity of the Mail
- Module 20: Claims and Inquiry
- Module 24: APWU Module

PEDC staff may obtain support from other subject matter experts, if possible, to assist with the course. All guest speakers should be encouraged to follow scripting of the course to ensure consistency.

Student Guidelines

For specific information regarding deferment periods, brush-up and refresher training, refer to Articles 37.3.F.7, 37.1L, 37.1M of the National Agreement, Handbook EL-912 and the referenced Memorandum of Understanding.

Course Description

Suggested Class Size

The recommended class size includes a minimum of 4 and a maximum of 21 students. A minimum of 4 future Associates allows for classroom interactions, group exercises, participation in role play, hands-on demonstrations, and future Associates/Classroom Instructor discussions. The Manager, Training will determine the number of future Associates for each class based on the ratio of Classroom Instructors to future Associates, available space and equipment (i.e., number of IRTs/POS ONE terminals available for training in the mock lobby). There must be a ratio of one Classroom Instructor for every six future Associates. If an office only has one future Associate for training, then local officials will determine the need to conduct the training. However, managers and supervisors must make strong efforts to *prohibit* employees from working in the retail environment without completing the training. To do so risks the loss of Postal Service retail professionalism in customer relations, service commitments, and accountable funds.

Duration

The classroom portion of the course may take up to 5 days. Classroom instruction is conducted using mock lobbies (simulation), followed immediately by the structured on-the-job training experience. Actual SOJT hours will vary by the number of job lesson plans required of the future Associate. Depending upon the Sales and Services Unit Profile.

Structured On-The-Job Instruction

A thorough, well-documented, structured on-the-job training process is critical to the success of the Sales and Services Associate Training program. Depending upon the eventual office of assignment, each future Associate may have a different structured on-the-job training experience.

Before the start of the classroom training portion, the postmaster or immediate supervisor of the future Sales and Services Associate must complete the Sales and Services Unit Profile (contact the district training office program administrator for sources).

The Sales and Services Unit Profile lists the identified job lesson plans that retail employees may need to know, depending upon the transactions conducted at the future Associate’s individual office. A portion of these job lesson plans have been identified as core lesson plans for all future Associates regardless of the size or office level of their eventual assignment. The balance of the job lesson plans are to be identified and documented on the Sales and Services Unit Profile by the postmaster or supervisor based upon the transactions conducted at the specific office where the future Associate will eventually be assigned. The final qualifying examination may not be administered until the completion of the core lesson plans.

The job lesson plans are covered one-on-one between the Retail Coach and the future Associate. This one-on-one training should occur during the normal transaction of business at the retail service counter. One-on-one coaching is defined as the Retail Coach *and* the future Associate working at one retail service counter or role playing. Training effectiveness is seriously diminished if the Retail Coach is working at one retail service counter, and the future Associate is assigned to work at another retail service counter and there is no one on one interaction between them on the appropriate lesson plans.

In some instances, and depending upon the nature of business transacted during the coaching time, all of the job lesson plans may *not* be covered. In that situation, the Retail Coach may role play examples of specific transactions that have not occurred during the segment with the future Associate. Retail Coaches must make every effort to conduct the structured on-the-job training with an minimum of role-playing.

Every job lesson plan taught during the structured on-the-job training experience must be documented using the Structured On-the-Job Training Worksheet. At the completion of the structured On-the-Job Training (SOJT) segment, the Retail Coach must consolidate all of the individual job lesson plans onto PS Form 2528, Structured On-the-Job Certification.

In cases where it is not possible for the future associate to receive their SOJT at their bid or assigned office, and it is not possible to have a retail coach brought in to that office to conduct SOJT, a training site(s) should be established. To ensure the highest quality structured on-the-job training, a training site should be defined as one where the Postmaster level is equal to or greater than an EAS-21 ranking. Each SOJT site *should* have <u>a minimum of three fully-equipped retail service counters that can adequately accommodate the on-the-job training experience without negatively impacting service to retail customers, regardless of the level of office</u>. Any office, station or branch selected to conduct the structured on-the-job training portion of the training should have sufficient customer volume to provide all the transactions that the trainee will be required to know in order to be proficient in their assigned retail office. Due to the deployment of POS ONE, if your 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 IRT or manual on-the-job training. **NOTE:** It is preferred, that the structured on-the-job training take place in the office where the Sales and Services Associate will eventually be assigned however this is not always possible. This exception is to accommodate those low customer traffic offices or those offices with a limited number of retail service counters. However, the Retail Coach is still required to customize the SOJT portion of the training specific to the transactions indicated on the Sales and Services Unit Profile. (The Sales and Services Unit Profile is a listing of possible transactions that could take place at any 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 arrival at the unit for training.

In some voluntary cases, Retail Coaches may go on-site to conduct the structured on-the-job training. Appropriate reimbursement for lodging, per diem, and travel is authorized in accordance with Handbook F-15, Travel and Relocation, and ELM 716. Local operations managers may elect to exercise this option based upon commuting distance and the suitability of the retail operation where the structured on-the-job training will occur.

During the structured on-the-job training, future Associates, with the Retail Coach present, must be issued a stamp credit consignment. PS Form 3369, *Consigned Credit Receipt,* must be prepared in triplicate by the person consigning the stock. The future Associate who accepts responsibility for the credit must date and sign the form according to Handbook F-1, Post Office Accounting Procedures and procedures of Article 28 of the National Agreement. During the structured on-the-job training, the future Associate must be given a stamp credit count and the credit will be closed out according to the procedures in Handbook F-1.

Note: The first and final audits are to be conducted with the Retail Coach present during the Structured On-the-Job training.

Training Hours and Schedules

The training and qualifying examination must be given on-the-clock. The future Associate’s time will be recorded as follows:

- Record and charge all time in class or study as training hours to the gaining retail unit. This applies when the future Associate is observing the Retail Coach or, when the Retail Coach is observing the future Associate.
- Record and charge all time spent performing required duties, or other structured on-the-job training activities which do not involve study, as work hours. (See Handbook F-21, Time and Attendance, Section 424.71.)
- Charge the time used for the written examination to training.

If during the future Associate’s training it becomes necessary to change the scheduled hours of work, the change may only be accomplished in accordance with the procedures specified in the Employee and Labor Relations Manual (ELM). Please follow procedures in ELM 434.2, 434.622, and 438.242 in administering and conducting this program.

- Use the National Training Database (NTD) to record training hours. Course #23501-02 should be used to record students completing the classroom course. For the future Associates who complete all of the core lesson plans in the SOJT portion of the training, use course #23Q01-06.

- The classroom portion is recorded on PS Form 2548, Individual Record of Training. The student must sign, to verify that the training was received.

Qualifying Procedures

To complete the training and become a Sales and Services Associate, the future Associate must pass the structured on-the-job training certification and the qualifying examination.

The following are documents used to facilitate and complete the certification of the structured on-the-job training.

Structured On-The-Job Training Certification Worksheet

Sales and Services Unit Profile: This sheet is to be completed by the Manager, Customer Services/Postmaster and Lead Sales and Services Associate or T-6 in the unit. The Sales and Services Unit Profile represents all the transactions that could possibly take place in their retail office. The area at the top indicates the core lesson plans that must be completed prior to the future Associate being eligible to take the qualifying examination allowing them to work on the retail service counter. The manager/postmaster or T-6 should review each transaction and check off every transaction that a clerk or sales and services associate working in their office would be expected to perform. This Sales and Services Unit Profile must be completed **prior** to the future Associate going to their office to be trained by the Retail Coach. All the information **must** be completed including the name of the retail unit, the name(s) of the person(s) completing the list, the date completed and the ZIP+4 of the unit. It is important that all the transactions that take place in the unit must be checked off for the training to be complete. If the future Associate is being trained at a different unit than their bid or assignment, then the Retail Coach at the training site must train the future Associate according to the lesson plans indicated by their bid or assigned unit.

Training Lesson Plans: A complete copy of all the training lesson plans should be available in every retail office for the Retail Coach in each office to refer to when a future Associate is sent for training or if brush-up training is necessary. It is mandatory that each of the 32 core and selected non-core lesson plans be taught. The non-core lesson plans are those beyond the first 32 that have been checked off by the manager/postmaster and unit lead associate or T-6 on the Sales and Services Unit Profile, prior to the future Associate reporting to the office for SOJT. It is important that Retail Coaches review and understand each of the transactions to be taught, to properly and make sure current information and manuals are being used and provided. Each training worksheet provides prerequisite information that the Retail Coach should review with the future Associate before the training begins as well as the equipment needed to successfully complete the transaction. The Retail Coach is to follow the steps as outlined and each step must be covered in the order written.

Structured On-the-Job Training Worksheet: These sheets serve as a cross-reference and summary of the lesson plans that were taught to the future Associate. The worksheets must be completed entirely for each future Associate. If the future Associate is being trained at a different office (training site) then their bid or assignment, please indicate the names of both offices on the worksheet. The worksheet lists the mandatory (core lesson plans, 1-32) that must be taught before the future Associate is eligible to take the qualifying examination. The future Associate must obtain a minimum score of 70% this equates to successfully completing 22 of the 32 core lesson plans in order to be eligible to take the qualifying examination. Successful completion of a core transaction is determined when the future Associate achieves 80% or better on that particular lesson plan (i.e. Lesson #1 has ten steps and successfully completes eight of them, their percent of steps completed successfully would equal 80% thereby qualifying them on that process). This worksheet also serves as documentation to indicate that the mandatory core lesson plans have been successfully completed. The worksheet also serves as the future Associate's official training record as they bid from office to office. For example, if the Associate bids into an office that requires them to perform a transaction that their structured training worksheet indicates they have not been trained on, the Retail Coach in the gaining retail unit can then use the lesson plan for that transaction and certify the Associate. It is important that for each lesson the future Associate is instructed, all applicable columns are completed.

PS Form 2528. The Structured On-the-Job Certification of the future Associates performance.

Each future Associate is certified on the Structured On-The-Job Training Certification (PS Form 2528). The training activities, which are to be evaluated, are listed on this form, and the Retail Coach uses it during the structured on-the-job training to record evaluations of the future Associate's performance. Before the Retail Coach gives any performance rating on the PS Form 2528, the manager at the structured on-the-job training site who has overall responsibility for the training and the evaluation must thoroughly review the training process to ensure that it was conducted according to procedures.

The Retail Coach, future Associate, and the manager at the structured on-the-job training site must sign the PS Form 2528. This manager must then send the signed and completed Form 2528 to the examination site so that it is available to the examiner at the time the qualifying examination is scheduled. If the structured on-the-job certification is delayed, or if the examiner is not promptly informed of the results, the qualifying examination will be delayed.

Qualifying Examination

The qualifying examination is administered at the end of the training program after the future Associate's PS Form 2528 has been completed. Only a certified examiner may administer the qualifying examination.

Note: The qualifying examination should be administered on the first workday following the completion of the structured on-the-job training.

Final Selection

The future Associate must successfully complete at least 22 of the 32 core lesson plans (70%) and then they are eligible to take the qualifying exam. The future Associate must then answer correctly 40 of the 50 (80%) questions on the exam in order to be deemed qualified and eligible to assume the bid or assignment.

Training Material and Supplies

A complete listing of training materials and supplies to successfully conduct the Sales and Services Associate Training course can be found on the Employee Development web home page.

Day-by-Day Course Contents

DAY 1	Module 1	Sales and Services Associates
	Module 2	Directives
	Module 3A	IRT (Unisys)
	Module 3B	IRT (MOS)
	Module 3C	POS ONE–NCR
	Module 3D	POS ONE–IBM
	Module 4	Domestic Mail
	Module 5	Credit/Debit Card Program
		Day One Review
DAY 2	Module 6	Customer Relations
	Module 7	International Mail
	Module 8	Establishing a Fixed Credit
	Module 9	Return Receipt, Restricted Delivery,
		Return Receipt for Merchandise, and
		Certificate of Mailing
	Module 10	Certified Mail
	Module 11	Registered Mail
		Day Two Review
DAY 3	Module 12	Image
	Module 13	Insured Mail
	Module 14	Collect on Delivery (COD) Mail
	Module 15	Express Mail
	Module 16	PO Box Service
	Module 17	Money Orders
		Day Three Review
DAY 4	Module 18	Postal Products
	Module 19	Security and Sanctity of Mail
	Module 20	Delivery Confirmation
	Module 21	Claims and Inquiries
	Module 22	Public Service Agencies
	Module 23	How to Handle Irate Customers
	Module 24	Union Module
		Day Four Review
DAY 5	Module 25	Overview of Customer Relations
	Module 26	Daily Financial Report
		Course Review
		First Examination
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		Appendix
DAYS 6–10		Structured On-the-Job Training (SOJT) including pre- and post-audits.
DAY 11		Qualifying Examination