RDM Report Reading for Managers Revenue Generation

Train-the-Trainer & Facilitator's Guide

Train-the-Trainer Course No: 41204-99
End User Training Course No: 41201-29

United States Postal Service
Retail Operations
475 L'Enfant Plaza SW
Washington DC 20260-5621

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.

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 that 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.

CONTENTS

Preface to this Course for Train-the-Trainer session

Note: *Please read this preface before teaching any Train-the-Trainer sessions.*

Course Philosophy

Train-the-Trainer training will be given after the end-user training. It is important to for you to hold your administrative questions until this part of the course is taught. There will be only one handout during this course, and it is the only authorized handout.

While this course has specific elements which need coverage, it is impossible to script every scenario which may be encountered at an individual office. Geographic areas frequently share commonalities and clientele, customer behaviors and local issues.

This course uses a question and answer format designed to foster discussion of local issues and occurrences among participants. PowerPoint materials are provided to supplement the discussion and provide a visual guide to module progression.

MODULE 1

Introduction to Retail Data Mart (RDM) Revenue Generation Report Analysis Training

Facilitator's Prep Section

(DO NOT READ TO PARTICIPANTS)

Pre-requisite

Participants must have completed and passed the on-line Retail Data Mart training prior to attending this class.

If any participant has not met this requirement, they should be dismissed from the class immediately.

Objective

The purpose of this module is for participants to:

- Become acquainted with each other
- Learn the course structure and course objectives
- Receive an overview and understand the benefits of using RDM

Length

15 minutes

Instructional Materials

Train-the-Trainer Facilitator's Guide
Computers (with Blue Page Intranet access)
LCD projector and screen
Rip Chart (Write the underlined information on a rip chart)
Copies of Module Listing (Addendum 1)

Rip Chart Page 1

Retail Data Mart (RDM) Revenue Generation Report Analysis Training-Course #

Rip Chart Page 2

Names of Facilitators
Phone numbers for emergencies

Rip Chart Page 3

Facilitator note: *Write these exact words on the chart. During introductions, each participant will be asked to provide this information.*

Your name and work location
What you know about Retail Data Mart
What you expect to get from this training

Course Schedule

This course consists of 10 modules with scheduled breaks.

Instructional Methods

It is important to have all reports from this training session in your "History" folder or "MY Reports" prior to the start of each classroom session. This is what you may have to use if there are any problems.

Facilitative discussion
Hands-on activity

Supplies

Post-it notes for parking lot
Pens or pencils
Writing pads
Sign-in sheet
Name tent cards
Magic markers for writing on name tent cards

Facilitator's Prep Ends Here

MODULE 1

Introduction to RDM Revenue Generation
Report Analysis Training

RIP CHART – Page 1

Welcome to Retail Data Mart Revenue Generation Report Analysis Training.
This four-hour VOE course was developed for managers from POS ONE offices.
This includes:

- Post Office Operations Managers
- Postmasters /Officers-in-Charge
- Supervisors/Managers Customer Service

On our first rip chart, we have listed the course name and number.

Pre-requisite

You must have completed and passed the on-line Retail Data Mart training prior
to attending this class. Has anyone here not completed the training?

Facilitator note: *If anyone has not met this requirement, they must be
dismissed from the class immediately.*

Does everyone have their logon ID and password? Has everyone logged on to
RDM at least once since obtaining their ID and password?

Facilitator note: *Be prepared to offer assistance to participants who have not
logged on to RDM at least once. Their password may need to be reset.*

RIP CHART – Page 2

Introduction

Facilitator(s) introduces herself/himself and gives phone number for
emergencies.

RIP CHART – Page 3

Participant Introductions

Participants introduce themselves
- Name
- Work location
- What you know about Retail Data Mart
- What you expect to get from this training

Housekeeping

- Restrooms
- Vehicle parking
- Fire exits
- Phones and pagers turned off

Administrative Duties

- Circulate Sign-in sheet
- Explain hours (4 hrs. VOE training charged to employee's office)

Course Introduction

The Postal Service is facing difficult economic times just like many other businesses.

It is critical to our success to do everything possible to hold down our costs while providing excellent services and products to our customers.

We have more than 700,000 employees, and the commitment from **every** employee – regardless of position or title – to increase revenue is vital to achieving success.

In today's competitive market, we must take advantage of every opportunity to increase our revenue, reduce expenses and fully utilize our automated equipment.

Every employee should know our products and services, how they are used, and the profit margin of each. Remember, small things add up.

As managers it is **your** responsibility to ensure that transactions are entered into the POS ONE system correctly. You must educate your employees on the importance of accurate transaction input. The use of RDM will reinforce this objective.

Course Objectives

The purpose of this course is for you to:

- Become familiar with various reports available in Retail Data Mart
- Navigate through Retail Data Mart to find, drill down, and read RDM reports
- Understand the revenue generation benefits of using Retail Data Mart
- Understand your responsibility to use RDM to help manage your office and generate revenue

Course Structure

The modules in this course are comprised of two parts. The first part is a demonstration showing you how to find, drill down, and read specific Retail Data Mart reports. You will log onto Retail Data Mart and follow along during this demonstration.

After most demonstrations are completed, you will access the same report for your own office.

This course is not intended to cover all reports that are available, but we will cover core reports that will be beneficial immediately.

The training consists of:

- Facilitative learning
- Hands-on activities
- Discussion topics
- Questions and answers

Course Schedule

This course consists of 10 modules.

Facilitator note: *Hand out listing of course modules and read aloud. (Addendum 2)*

Module Objective

The purpose of this module is for you to:

- Become acquainted with each other
- Learn the course structure and course objectives
- Receive an overview and understand the benefits of using RDM

Introduction

The vision of "One Team - One Dream" is for everyone. No one person can do it alone. No one hundred people can do it alone. We **must** work together as a team to be successful.

No team can win without knowing the right moves.

All employees must know our products and services before they can sell them.

What you get out of RDM is only as good as what you put into it. It is critical that associates follow proper procedures when entering data and transactions into POS. Associates must always follow the proper mailing workflow and **never** circumvent the system. Purposefully entering incorrect information or incorrect steps for transactions is considered "falsifying information".

The effective use of RDM as a management tool ensures that proper procedures are followed by Retail Associates, and should result in improvements in Mystery Shopper scores.

This course will help you identify opportunities for revenue generation through the use of RDM.

Overview of Retail Data Mart

The use of RDM enables managers in POS ONE offices to:

- Effectively increase retail revenue
- Manage resources
- Improve service to customers

Information is downloaded nightly to the Retail Data Mart, so data is always current to the prior day.

Once you have obtained a log-on ID, you can log on to and navigate RDM wherever you have access to the Postal Routed Network (PRN). You can view numerous reports for **any** POS ONE office.

You will be able to use these reports to better manage your own office. RDM reports provide information on:

- Productivity levels
- A variety of transactions that are conducted at the window
- Flash reports
- Orphan PVIs (PVIs printed without following the proper workflow and have no barcode)
- Revenue from different types of sales
- Percentages of special services sold by each employee

Benefits of using RDM

There are many benefits of using RDM reports. These reports can:

- Document each Retail Associate's performance
- Identify any Retail Associates who are using Orphan PVIs
- Display the number of mail pieces and revenue for each class of mail
- Identify "Stamps Only" sales
- Identify whether Retail Associates are selling from "top down" or "bottom up" (Are they offering expedited services before offering parcel post?)
- Identify Retail Associates who **are** selling special services
- Provide opportunities for employee recognition

Does anyone have any questions or comments about this module?

Summary

Now that you have completed this module, you should:

- Be acquainted with each other
- Understand the course structure and course objectives
- Understand the benefits of using RDM

Module 2

Log-on and Access Retail Data Mart

Facilitator Prep Section

(DO NOT READ TO PARTICIPANTS)

Objective

The purpose of this module is to learn:

- How to log-on and access RDM
- How to navigate the RDM home page

Length

20 minutes

Instructional Methods

Facilitative discussion
Hands-on activities

Instructional Materials

Train-the-Trainer Facilitator's Guide
Computers (with Postal Intranet Blue Page access)
LCD projector and screen
Rip Chart

Rip Chart Page 4
EDW Umbrella

Supplies

Post-it notes for parking lot
Writing pads
Pens or pencils

Facilitator Prep Ends Here

Module 2

Log-on and Access Retail Data Mart

Objective

The purpose of this module is to learn:

- How to log-on and access RDM
- How to navigate the RDM home page

Introduction

Let's get started! We are going to log-on to Retail Data Mart. It is imperative that everyone stay together.

DO NOT GO AHEAD OF THE CLASS!! As we stated earlier, you will have the opportunity after most demonstrations to find the same report for your own office. It will make the class a better learning experience for everyone if we stay together.

Is everybody ready??

Facilitator Note: *Have participants:*

- *Log-on to the Blue page*
- *Type EDW in the address bar and press enter*
- *Enter their user name and password*

Is everybody logged on?

After logging on, a message box appears showing you the current status of the Enterprise Data Warehouse, EDW, system. Make sure you read this message each time you log-on, it will inform you of updates and any system problems.

- Click on "Close window"

Rip Chart – Page 4

EDW is a data warehouse.

A data warehouse is like an umbrella.

It covers several different data marts which are stored in one place for reporting and analysis.

Facilitator note: *Review the umbrella (Rip chart 4 & Addendum 3)*
Even though there are other data marts available in EDW, we will only be looking at the Retail Data Mart today. Let's go to the RDM Home Page.

- Click on Retail
- Close any notification messages

Everyone should be on the "Home Page". Notice that the tabs located at the top are the same as the folders. Everything that is in blue and underlined is a link. You can click on a tab or a link to go to these folders. Let's look at some of these now.

- Click on the "Shared Reports" tab

Shared Reports are saved reports that are accessible to multiple users. This is the folder you will use most often when running reports.

If you aren't sure which folder you need, you can click on the folder description.

Facilitator note: *Read Folder Description for each folder that is reviewed.*

- Click on "Folder Description" beneath "Sales Reports"

As you can see, this folder contains sales and revenue data.

- Click on "Close Button" to close this window

- Click on the folder description for "Mailing & Postage Reports".

This report contains data for selected mailing classes and special services.

- Click on "Close Button" to close this window.

Now, let's look at some of the other tabs.

- Click on the "History" tab. This tab will be very useful to you. For instance, you can execute a report or several reports in the morning, and then walk away from your computer. When you return, reports will be available for you to review.

  If you have not previously logged on and used RDM you will not have any reports in this folder.

  Objects do not remain in the "History" list indefinitely. The number of objects that each user can have in the "History" list and the length of time they remain there is controlled by the administrator.

Currently there is a maximum of 25 entries. Each document may count up to 5 entries. Once the maximum entries have been reached, the oldest report is deleted.

If you want to save your report indefinitely, you should click on the disk icon in the upper right hand corner of your report and save to "My Reports".

- Click on the "Find Reports" tab. If you can't remember the path you need to take to go to a report, you can find it by typing in any part of the description in the "Search For" box.

We want to find the "Orphan PVI" report, but we don't remember how to get there.

- Type "Orphan" in the "Search For" box

We only need to search in "Shared Reports".

- Click in the circle beside "Only inside folder **Shared Reports"**.
- Click on "Find Reports"

Facilitator Note: <STOP> *Ensure everyone is on the correct page. Scroll down, if necessary, to view the results.*

You now see the report, the description and the path to its location.

- Click the "Home" tab to return to the "Home" page

There are a number of other tabs which you can explore later.

All RDM Reports and Documents are "Read-Only" – you cannot alter or delete them, so do not be hesitant to explore and experiment.

Does anyone have any questions or comments about this module?

Summary

In this module you learned:

- How to log-on and access RDM
- How to navigate the RDM home page

Module 3

Monthly POOM Support

Facilitator Prep Section

(DO NOT READ TO PARTICIPANTS)

Objective

The purpose of this module is for the participants to access POOM Flash Reports. These reports can be used to measure and compare each office's performance of Retail Operations to other offices from within a specific POOM area.

Upon completion of this module, participants should be able to:

- Access and execute a Flash Report
- Read and print the report
- Use the report to compare revenue between offices

Length

25 minutes

Instructional Methods

Facilitative discussions
Hands-on activities

Instructional Materials

Train-the-Trainer Facilitator's Guide
Computers (with Postal Intranet Blue Page access)
LCD projector and screen
Rip chart (Write the underlined information on a rip chart)

Rip Chart Page 5 – Scenario 1

Southeast Area - Tennessee District
POOM 3 - December 2003

Rip Chart Page 6

Shared Reports>Flash Reports>POOM>Monthly POOM Support

Supplies

Post-it notes for parking lot
Writing pads
Pens or pencils

Facilitator Prep Ends Here

Module 3

Monthly POOM Support

Objective

The purpose of this module is for you to access POOM Flash Reports. These reports can be used to measure and compare each office's performance of Retail Operations to other offices from within a specific POOM area.

Upon completion of this module, you should be able to:

- Access and execute a Flash Report
- Read and print the report
- Use the report to compare revenue between offices

Introduction

The Monthly POOM Support Report provides a breakdown of data for all POS ONE locations or a specific POS ONE location in a selected POOM area. Let's look at one now.

- Click on the "Shared Reports" tab

RIP CHART - Page 5

Scenario (1): You are POOM Number 3 in the Tennessee District from the Southeast Area. You want to see how the offices from your area performed in Retail for the month of December 2003.

We need to find a flash report for POOM number 3.

Question: Which folder would we choose?

Answer: Flash Reports.

- Click on "Flash Reports"

The Flash Reports folder contains weekly revenue and productivity reports generated at the unit, district, area, and national levels.

These reports provide a method to measure and compare performance of Retail Operations.

Question: Now which folder should we choose?

Answer: POOM

- Click on "POOM "

Facilitator note: *<STOP> Verify that all participants are on the correct page.*

You see four different folders here. We want the Monthly POOM Support folder.

- Click on "Monthly POOM Support"

Facilitator note: *<STOP> Wait for page to load.*

Look at the numbered steps on the left. In order to execute the report, each of these steps must have a check mark beside it. At the bottom of the screen is the Execute Document box, which is currently gray – this indicates that all steps have not yet been completed.

You must now select the District.

- Scroll down and click on the Tennessee District. Once that is highlighted
- Click on "Drill" in order to drill to POOM.

Facilitator note: *<STOP> Allow time for the screen to load.*

Is everyone here?

- Click on POOM Number 3 to highlight
- Click on the right arrow to move POOM 3 to the right.

Remember, you don't want to move anything to the right selection box until you have finalized all of your selections.

Notice that Step 1 now has a check mark.

- Click "Select Month"

- Click on the down arrow in the drop-down box , then scroll down and highlight December 2003.

Is everyone here?

All of our information has been entered, and the "Execute Document" box at the bottom of the screen is no longer grayed out.

- Click "Execute Document"

Sometimes this process may take some time. Just keep in mind that you control this process – it should not control you or your time. After executing the reports, you can walk away to complete other tasks. You can also execute another report while this report is still running.

If you experience long delays or other problems, you can click on the icon in the far right upper corner (looks like Pac-Man) which is the "Report a Problem" button.

The deeper you drill, the longer it takes to execute the report.

While our report is executing, I want to give you some facts about the Retail Data Mart. The RDM contains about 9 billion rows of data. In an average business day, we process almost 9 million transactions. This equates to a little over 49 million transactions per week, and almost 2.5 billion per year! Every day, we serve the needs of approximately 4.1 million customers, which can add up to almost 23 million customers per week, and 1.1 billion per year!

It is important to remember that a customer at our retail counter may conduct more than one transaction during his visit.

The RDM is balanced to 99.96% of the visits daily. This means that the Tender/Change amounts equal the Transaction Revenue/Return amounts to the penny!

This works because POS information is delivered into the system daily in multiple independent files. The files are then reconstructed to match the daily 4.1 million customer visits and all of their related 9 million transactions at 99.96 %. This system is almost perfect! Most people cannot balance their check books with this accuracy, but we are able to balance our records even with this much data! Pretty impressive!

This data yields a very accurate version of the truth about what is exactly happening at the POS units. With all the information that the RDM is able to provide us with, it is important to stress that all employees are placing all transactions into the retail system. This enormous amount of information is used to support the USPS in making the best business decisions for our organization.

Okay – has everyone's report fully executed?

Facilitator note: <STOP> *Verify that everyone's report has fully executed for all participants before proceeding and that everyone is on the same page.*

Notice that this Flash report differs from the workhour Flash report that you may be familiar with in your office.

This Flash report will show you how the retail units are doing in offering our expedited services first.

Facilitator note: *Point out the path on the LCD display.*

You are here: Shared Reports>Flash Reports>POOM.

This is the path we took to get to this report. This is like a road map. You started out on "Shared Reports" and took the path of "Flash Reports" and then took the "POOM" path.

The Monthly POOM Support Report can be used by POOMs to get a quick snapshot of revenue activity from offices within their area.

If we scroll over to the right-hand side, we can see that POOM 3 and the month December 2003 is the selected report.

Now scroll back over to the left.

This report can be helpful to a POOM to review how the Retail Units are performing. Notice there are three canned reports in this display. They are:

- The Retail Unit Key Performance Comparisons Report, which compares retail revenue to SPLY

Facilitator Note: <STOP> *Allow time for participants to review. Scroll down to display the next report.*

- The Retail Unit Breakdown Report, which lists revenue by mail class and product type

Facilitator Note: <STOP> *Allow time for participants to review. Scroll down to display the last report.*

- The Retail Unit Comparison Productivity Report, which compares Walk-in Revenue (WIR) per Customer Visits, Transactions and Terminal Hours

Let's discuss the first report. Scroll back to the top. Is everyone together?

Facilitator Note: *Scroll back up to display the report.*

The first report is the Retail Unit Key Performance Comparisons Report.

Look at the column headings. They are:

- Retail Unit – All offices on POS ONE for this POOM area
- Business Days (in the month of Dec) and SPLY
Note: Offices showing "0" business days were not on POS during this time period
- Total and SPLY and % to SPLY
- Priority Mail and SPLY and % to SPLY
- Special Services and SPLY and % to SPLY
- Walk-in-Revenue (WIR) per POS ONE Terminal Hour and SPLY and % to SPLY
- Open both years

Now let's look at the rows.

Facilitator Note: *Scroll back to the left.*

Question: What was the total revenue for the month of December for this POOM area?

Answer: $1,885,041.90

Question: Which office had the highest Priority Mail improvement over SPLY?

Facilitator Note*: If necessary, scroll to display the Priority Mail % to SPLY column.*

Answer: Carthage had a 44.1% improvement.

Let's scroll down and look at the second report. This is the Retail Unit Breakdown Report. It shows a breakdown of how the individual offices are selling our stamps, products and services.

Question: Which office sold the most Express Mail? Not Express Mail Stamps – just Express Mail.

Facilitator's Note: *Scroll to display the Express Mail column, if necessary.*

Answer: Madison with $6,070.40.

Let's scroll down to the third and final report. This is the Retail Unit Comparison Productivity Report. This report can be used to see how offices are doing in Walk-in Revenue (WIR) per Customer Visits, Transactions and Terminal Hours.

Question: Which office has the greatest increase in Special Services over SPLY percentage wise?

Facilitator's Note: *Scroll to display the Special Services column, if necessary.*

Answer: Carthage is up 50.9% compared to SPLY.

Let's talk about printing reports

You can print any RDM report. To do this, simply:

- Scroll to locate the Printer Icon in the upper right-hand corner to print this report

You could also print it from the Toolbar by clicking on "File" then "Print". However, this will print the entire page, which will include everything you see on the screen. Using the Printer icon allows you to print only this report.

Now, let's have each of you find and execute the "Monthly POOM Support Report" for your own POOM. You can use any month. If anyone needs any help, just let us know.

Rip Chart – Page 6

The path you need to take to get to this report is on the Rip chart.

For the sake of time, we just want you to "execute" the report.

Facilitator note: *Walk around and check how participants are doing.*

Facilitator note: *Ensure that everyone has executed their report before moving on.*

This report will be saved in your History folder, and you can save it to the "My Reports" folder if you like. You will have an opportunity to review your reports in the Summary module.

Does anyone have any questions or comments about this module?

Now, to get back to our starting point – Shared Reports:

- Click on the "Shared Reports" tab

Summary

In this module, you learned to:

- Access and execute a Monthly POOM Support Report
- Read and print the report
- Use the report to compare revenue

Module 4

Search for Retail Unit Finance Number & Unit ID

Facilitator's Prep

(DO NOT READ TO PARTICIPANTS)

Objective

The purpose of this module is to teach participants how to:

- Locate a POS ONE finance number & unit ID
- Copy and paste a finance number & unit ID onto a report

Length

5 minutes

Instructional Methods

Facilitative discussions
Hands-on activities

Instructional Materials

Train-the-Trainer Facilitator's Guide
Computers (with Postal Intranet Blue Page access)
LDC projector and screen
Rip chart (Write the underlined information on a rip chart)

Rip Chart Page 7 - Scenario 2
Main Post Office – Inman, South Carolina
Finance Number and Unit ID: 4541600349

Supplies

Post-it notes for parking lot
Writing pads
Pens or pencils

Facilitator Prep Ends Here

Module 4

Search for Retail Unit Finance Number & Unit ID

Objective

The purpose of this module is to teach you how to:

- Locate a POS ONE finance number & unit ID
- Copy and paste a finance number & unit ID onto a report

Introduction

In order to execute some reports, the finance number and unit ID must be entered manually. You would use this folder to locate this information if it is unknown.

- Click on the link "Search for"

You can search for a product or item, but we are searching for the finance number and unit ID.

- Click on the link "Search for Retail Unit Finance Number & Unit ID"

Facilitator note: *Wait for the page to open.*

Once the page opens, you can enter all or part of a retail unit name using four or more characters in the "Selection Summary" box.

RIP CHART - Page 7

Scenario (2): We are looking for the Main Post Office in Inman, South Carolina.

- Type "I-N-M-A" in the "Selection Summary" box. You do not have to press "Enter".

After you have entered this, notice Step Number One has a check mark beside it. Since this is the only step required, the "Execute Report" button becomes active.

- Click on "Execute Report"

Facilitator note: *<STOP> Wait for the report to appear.*

When the report appears, you see all the post offices beginning with the letters I-N-M-A.

Remember, we are looking for the main post office in Inman, South Carolina. It is the first one listed.

We also have a main post office and a station located in the Boston District and a post office in the Central Plains District.

Plants, Stations and Branches are Retail Units **only** because they are part of the Main Post Office.

A Post Office level is made up of all the Retail Units within that Post Office, including Stations and Branches. Retail Units are within a Post Office.

- Highlight the finance number and unit ID for the Inman, South Carolina Post Office.

You should have selected #4541600349.

- Click on "Edit" on the toolbar at the top of the page

- Click on "Copy"

You have just copied the finance number and unit ID. Now you are ready to paste it into a report, that we will use in the next module. Now we need to find the "Monthly-Yearly Retail Unit Flash" report.

In order to do this, we need to:

- Click on the "Shared Reports" tab to find the report

- Now click on "Flash Reports"

- On this screen, click on "Retail Unit"

- Now click on "Monthly-Yearly Retail Unit Flash"

You need to enter the finance number and unit ID that you just copied. The cursor is already blinking in the box where you need to enter this number.

- Click "Edit" on your toolbar at the top of the page
- Click on "Paste"

Many of you may use alternate ways to copy and paste, and these variations will work in this exercise.

Due to time limitations, you are not going to search for a unit finance number on your own in this module.

Now, to get back to our starting point – Shared Reports:

- Click on the "Shared Reports" tab

Question: Do you understand what you just did? **<PAUSE>** Are there any questions about this module?

Summary

In this module, you learned to:

- Locate a POS ONE finance number and unit ID
- Copy and paste a finance number and unit ID into a report

Module 5

MONTHLY - YEARLY RETAIL UNIT FLASH REPORT

Facilitator Prep Section

(DO NOT READ TO PARTICIPANTS)

Objective

The purpose of this module is for the participants to access Flash Reports in order to measure and compare their individual office performance of Retail Operations to other offices. Participants will be using the History folder to access this report.

Upon completion of this module, participants should be able to:

- Access and execute a monthly-yearly Flash Report from the History folder
- Read, analyze and comprehend the report
- Understand revenue transaction
- Use the report to increase revenue

Length

35 minutes

Instructional Methods

Facilitative discussions
Hands-on activities

Instructional Materials

Train-the-Trainer Facilitator's Guide
Computers (with Postal Intranet Blue Page access)
LCD projector and screen
Rip Chart (Write the underlined information on a rip chart)

Rip Chart Page 8 - Scenario 3
Inman, SC - 4541600349 -   March 2004

Rip Chart Page 9 – Path
Shared Reports>Flash Reports>Retail Unit>Monthly-Yearly Retail Unit Flash

Supplies

Post-it notes for parking lot
Writing pads
Pens or pencils

Facilitator Prep Ends Here

Module 5

MONTHLY - YEARLY RETAIL UNIT FLASH REPORT

Objective

The purpose of this module is for you to access Flash Reports in order to measure your individual office performance of Retail Operations. We will be pulling this report from the History folder.

Upon completion of this module, you should be able to:

- Access and execute a monthly-yearly Flash Report from the History folder
- Read, analyze and comprehend the report
- Understand revenue per transaction
- Use the report to increase revenue

Introduction

The Monthly-Yearly Retail Unit Flash report provides operating performance data for a retail unit for a specific month and year-to-date as well as for the same periods last year (SPLY).

Facilitator Note*: Ensure everyone is on the "Shared Reports" page.*

Rip Chart - Page 8

Scenario (3): We want to look at a retail unit and see how the Retail Associates are selling our products and services. Let's look at the Inman, S.C. post office for the date March, 2004.

We need to find a flash report for this retail unit. Remember, in the last module we located the Finance and Unit ID number for Inman and pasted it on this report. Where do you think you can find this report? **<PAUSE>**

- Click on the "History" Tab

Notice that the Monthly – Yearly Retail Unit Flash Report is there "waiting for prompt".

Question: How do you think we can access this report?

- Click on "Monthly – Yearly Retail Unit Flash"

Question: Now what is it prompting you to do?

- Enter the Finance and Unit ID number.

The cursor is flashing in the 10 digit number field.

- Click on "edit" from the tool bar
- Click "paste"
- Press "enter" for check mark to appear beside step 1

Facilitator Note: *Ensure everyone is on the same page.*

Notice the numbered steps on the left. We have entered the 10-digit number. Now we need to select the month.

- Click on "Select Month".
- Click on down arrow
- Select March 2004

All of our information has been entered and "Execute Document" is now active.

- Click "Execute Document"

A Flash Report is not drillable – it's like a Polaroid picture, all you can do is view the report.

Flash Reports will show you if Retail Associates are offering our expedited services first. Selling cheaper services does not necessarily make our customers love us more. If fact, we may not be helping them at all!

If you go into a store to purchase a pair of shoes, sales associates are not going to direct you to the sales rack. They will show you their top-of-the-line shoe first. If that shoe is too expensive, they will work down their product line – going to the sales rack as a last resort.

This is the sales philosophy we **must** be using in our retail units – offering our expedited services first to generate the most revenue from each transaction, as well as identify and satisfy the needs of our customers.

Facilitator note: *<STOP> Verify that the report has fully executed for all participants before proceeding.*

Look at the top of the screen to find the path you took to get to this report.

Facilitator note: *Indicate location on LCD display.*

You are here: Shared Reports>Flash Reports>Retail Unit.

This Flash Report can be used to review your individual office retail performance.

The first report applies to POS ONE retail units that have been on POS ONE at least 2 years.

Scroll down to display second report.

The second report applies to all retail units regardless of how long they have been on POS ONE.

In a Retail Unit Flash Report, these two reports will be identical. In a District, Area, or National Flash Report, these two reports may differ.

For discussion purposes, we will review the first report. Scroll back up to the first report.

Down the left-hand side are four categories. As we scroll down, we see:

- Walk-in Revenue (WIR)
- Operational Data
- Business Days
- Retail Productivity

Now scroll back up to the top to see the column headings which are:

- Actual for Month
- Actual for Month for SPLY
- % Compared to SPLY
- Actual for Year to Date
- Actual for Year to Date for SPLY
- % Compared to SPLY

Let's look at the first category, which is Walk-In-Revenue, and briefly discuss the following products and services from this report.

As you can see, the total walk-in revenue for the month is 4.0% over SPLY and Year-to-Date is 3.1% over SPLY. **THAT IS OUTSTANDING!!**

When reviewing this data don't make a conclusion of the results based on SPLY and Year to Date until you look at the calendar. It is important that you compare work days and determine possible differences such as less days, half days or even added days. Any difference could cause a shift in data, and must be taken under consideration.

Although there are numerous attributes on this report, we will just review a few. Let's start with the row titled Express Mail. This is Express Mail Revenue, which reflects the dollar revenue from Express Mail sales.

The next row under that is Express Mail Walk-in-Revenue Transactions (abbreviated TXN). We need to increase this number, which represents the number of Express Mail pieces coming across our counters. By increasing the number of transactions, it should increase our revenue.

The next row under that is Express Mail Full Postage Affixed and EMCA TXN (Express Mail Corporate Account). This represents the number of pre-paid Express Mail transactions.

Now that we have explained the difference between revenue and transactions, let's look at the transactions for Express Mail, Priority Mail, and Parcel Post to determine if this office is offering expedited services first, and selling from the top down rather than from the bottom up.

Question: Are the Express Mail transactions up or down for the month?

Answer: Down (8.0) % for the month

Question: Now, look at % compared to SPLY. Is it up or down?

Answer: It's up 2.8%

They are down for the month, but up in % compared to SPLY. This is good.

Now let's look at Priority Mail transactions.

Question: Are Priority Mail transactions up or down for the month?

Answer: Up 3.8%

Question: What about % compared to SPLY? Is it up or down?

Answer: It's down 4.3%

Even though they had more Priority Mail transactions for the month, they are down in % compared to SPLY.

Question: Now let's look at parcel post transactions. Are they up or down for the month?

Answer: Up 19.7%

Question: How about % compared to SPLY?

Answer: Up 18.3%

Now, we need to compare these transactions and analyze them. Let's compare YTD figures

- Express Mail **2.8%**
- Priority Mail **(4.3%)**
- Parcel Post **18.3%**

Question: What do you think these figures are telling us?

Answer: When parcel post numbers are higher than Express and Priority, this could be an indication that the Retail Associates are selling from the bottom up. Retail Associates should be offering our expedited services first (top – Express Mail). Our least profitable services should be offered last (bottom – Parcel Post).

Now let's look at the "Other Domestic" category, it contains miscellaneous types of mailings including Library and Media Mail. As you can see, they're up 56.7% for the month and .9% for year to date.

The percentage increase for the month is extremely high, but YTD figures are low. A media mail customer could have made a big mailing this month which caused the monthly figures to be high. As long as the YTD figures are low, there may not be a problem.

We've been looking at transactions. The next three attributes we're going to look at contain revenue data.

Question: Let's look at Special Services. Are they up are down for the month?

Answer: Up 8.8%

Question: What about year to date?

Answer: Up 6.8%

This is great! This shows that associates are selling special services and increasing revenue in this area.

Question: Packaging Products - Are they up or down for the month?

Answer: Down 8.4% for the month but only down 1.3% for year to date

This is an area where there are possible opportunities for revenue growth.

Finally, let's look at Retail Services. These are services which include PO Box rents, money order fees, etc.

Question: Are they up or down for the month?

Answer: Up 2.3% for the month and up .8% year to date

If they continue this monthly trend, they will definitely increase the year to date numbers.

Let's scroll down and look at Operational Data. As you can see, our customer visits are up 1.1% YTD.

If we look at POS ONE terminal hours, we see that they're down 2.4% for the month and down 9.4% YTD. The fact that customer visits are up and POS ONE terminal hours are down indicates that the employees are utilizing the POS system in the manner for which it was designed.

Let's look at the next category, which is Business Days. The thing I want to point out here is that they might not always match. If you do an audit and log-on to the system on a non-business day such as Sunday, then it is counted as a business day. If you observe a holiday or day of mourning then it is counted as a non-business day.

The last category we are going to talk about is retail productivity.

The first attribute shows us Walk-in Revenue per POS ONE terminal hour. This indicates how much revenue we generate for every hour a POS terminal is in use.

As you can see, this office went from $127.l4 to $144.65. This is a 13.8% increase YTD.

The next attribute is Walk-in Revenue per Customer Visit. Customer spending has increased 1.9%, from $8.58 per customer to $8.74 per customer YTD.

The next three attributes are dealing with transactions only. The figures shown are derived by dividing different types of transactions and is shown as a ratio.

As you can see, they are not as productive here.

Total YTD Expedited Mail WIR TXNs (5046) divided by Parcel Post WIR TXNs (1793) equals 2.81. The ratio in this office has dropped from 3.44 down to 2.81, an 18.3% drop YTD.

Total Special Services WIR TXNs divided by total Mailing WIR TXNs is down 1.8% YTD.

Total Expedited WIR TXNs divided by total Domestic Mail WIR TXNs has also slipped from a ratio of .29 to .27, a 6.8% drop YTD

Your goal is to achieve positive percentages in each of these attributes we have just discussed. The bottom 5 attributes should always be positive. If you have negative numbers, this indicates these are areas you should be concerned about.

Now you can run a Monthly-Yearly Retail Unit Flash report for your own office. You can review it after we have finished reviewing this report on the big screen.

If anyone needs help, just let us know. If you don't know your unit finance number where can you find it? (Answer: Shared Reports >Search for)

Rip Chart – Page 9

Facilitator note: *After everyone has clicked on "Execute Document", continue with the following dialogue while their documents are executing.*

You should share this report with your associates and encourage them to sell from the "top". Customers need to understand that Parcel Post goes by ground transportation while most Priority and Express goes by air.

Customers need to understand that Express is our **only** service that is guaranteed, even if the piece of mail is going to an address that is in the next-day delivery area.

Employees may think they know what the customer wants, when in fact they don't. Associates should always explain the different services that are available to each and every customer – EVERY TIME.

There have been incidents where a customer came in to mail an Express letter, but the Retail Associate told them that it would get there overnight any way. Then when the piece of mail did not arrive as expected, the customer was upset because they needed the piece of mail to arrive the next day. They were willing to pay the extra postage, but the Associate convinced them it was not necessary to do this. This is one of those cases where we assume we know what the customer wants.

Question: Does anyone have any similar examples to share?

Facilitator note: *Limit discussion to 2-3 examples – not to exceed 5 minutes.*

Now, let's look at your individual reports and see how you're doing compared to Inman, SC.

If you've been open less than 2 years, you will not have any SPLY data. When you return to your work location, run a report on an office in your district that is similar in size to yours and compare results.

Question: How can the data in this report help you increase revenue?

Facilitator Note: *Facilitate discussion with participants. Encourage the sharing of information, results and comments. Allow 2-3 minutes for discussion.*

Question: Looking at Total Revenue, Inman is up 3.1% YTD.
Who has a higher percentage than that?

Question: Express Mail Walk In TXNs – this office is up 2.8% YTD. Who has a higher score?

Question: Priority Mail TXNs – they're down 4.3%. Who has a plus number in this group?

Question: Parcel Post WIR TXNs – as you can see, this office appears to be selling from the bottom up and is at 18.3% YTD. Who has a lower number than this office?

Question: Under Special Services, this office is doing an outstanding job YTD, with a 6.8% increase. Who can beat that?

Question: For Packaging Products/ReadyPost, this office is down 1.3%. Does anyone have a positive number here?

Question: Customer Visits – YTD this office is up 1.1%. Who else has a positive trend?

Now let's take a look at Retail Productivity. As you can see, this office is making $144.65 per terminal hour. Who in here is making more money per hour?

Question: Inman's WIR per Customer Visit is up 1.9%. Who has a higher WIR per Customer Visit?

This is one reason why it's important to record an entire customer visit because one visit can be composed of many transactions. Remember, RDM doesn't give you the answers, it only raises the questions. So you need to be involved in working with your Retail Associates to gather the answers.

Question: Are there any questions about this report or how to use it?

Now to get back to our starting point – Shared Reports:

- Click on the "Shared Reports" tab

Summary

In this module you learned to:
- Access and execute a monthly-yearly Flash Report
- Read, analyze and comprehend the report
- Understand revenue per transaction
- Use the report to increase revenue

Module 6

Orphan PVI

Facilitator's Prep Section

(DO NOT READ TO PARTICIPANTS)

Objective

The purpose of this module is to identify revenue that is not associated with a specific product or service.

Upon completion of this module, participants should be able to:

- Find and drill down to the "Orphan PVI" report
- Determine the number of Orphan PVIs that have been generated
- Determine the Retail Associates who are printing Orphan PVIs
- Realize the negative impact of printing Orphan PVIs

Length

45 minutes

Instructional Methods

Facilitative discussions
Hands-on activities

Supplies

Pens or pencils
Post-it notes for parking lot
Writing pads

Instructional Materials

Train-the-Trainer Facilitator's Guide
LCD projector and screen
Computers (with Postal Blue Page Intranet access)
Rip Chart (Write the information underlined on a rip chart)

Rip Chart Page 10 – Scenario 4
Western Area – Colorado/Wyoming District – Westminster Post Office – FY-2003

Rip Chart Page 11
Shared Reports>Sales Reports>Revenue>Orphan PVI

Facilitator Prep Section Ends Here

Module 6

Orphan PVI

Objective

The purpose of this module is to identify revenue that is not associated with a specific product or service.

Upon completion of this module, you should be able to:

- Find and drill down to the "Orphan PVI" report
- Determine the number of Orphan PVIs that have been generated
- Determine the Retail Associates who are printing Orphan PVIs
- Realize the negative impact of printing Orphan PVIs

Introduction

The POS ONE system was designed to capture data about every transaction conducted at our retail windows.

When Retail Associates circumvent the system by eliminating steps, they skew the data results.

They sometimes miss opportunities to sell value-added services and lose time earned at the window.

Associates must always follow the proper mailing workflow to avoid orphan PVI labels.

Question: Can anyone tell me what an orphan PVI label is?

Answer: A PVI label that has no barcode due to the fact that the proper workflow was not followed.

All PVI labels without a barcode should **not** be considered orphans. For instance, items that have been registered or have some other type of special service have no barcode, but they are not orphans.

It is very common practice for Retail Associates to try and save time by creating orphan PVIs. For example: You have a customer who presents the Retail Associates with 10 pieces of Priority mail. The Retail Associate weighs and rates the first piece and follows the proper mailing flow obtaining a PVI with the destination zip barcode, and postage. The Retail Associate knows these pieces are identical so they create 9 more PVIs without inputting each zip code to save time.

However, for every orphan PVI that is printed, your office loses the time credited for a transaction. The more complex the transaction, the more time you lose.

For example: Certified Mail with Return Receipt. The time factor is approximately two minutes. As long as each piece is entered into the POS ONE system using the proper mail flow, your office will be credited appropriately. If the Associate runs multiple Orphan PVIs, you receive **NO** credit.

As you can see, it wouldn't take long for those little figures to add up and become big figures.

Again, associates must **never** circumvent the system. Deliberately entering incorrect information or incorrect steps for transactions is considered "falsifying information".

The correct destination ZIP code must always be entered to fully utilize our automated equipment and to prevent the mail from being misrouted. **NEVER** use a PVI on anything other than the mail for which it was originally intended.

Flats and parcels each have specific barcode types important for processing and on-time delivery. When accepting a flat for mailing, the associate must always select "flat" so that it has the correct barcode.

In this module you will learn to determine the number and value of Orphan PVIs that each Retail Associate is printing.

Facilitator's note: *Ensure that everyone is on the "Shared Reports" screen.*

RIP CHART - Page 10

Scenario (4): You are the Postmaster in Westminster, Colorado. From your WOS report, you know that your office receives absolutely no credit for Orphan PVIs. You want to see if this practice is occurring, and ensure that you are not losing hours due to Retail Associates printing Orphan PVIs.

Question: Do you remember which report deals with revenue and which one deals with products and services?

Answer: "Sales Reports" deal with revenue. "Mailing and Postage Reports" deal with products and services.

Question: We are looking for orphan PVIs. Which path should we take?

Answer: Sales Reports

- Click on Sales Reports

Question: Which folder do we select next?

Answer: Revenue

- Click on Revenue

Question: Which folder do we select next?

Answer: Orphan PVI

- Click on Orphan PVI

Westminster is in the Western Area and the Colorado/Wyoming District.

- Click on "Western" and drill to District

- Click on "Colorado/Wyoming" and drill to post office

A list of post offices is displayed, but you do not see Westminster. Since it is not shown on this page, you must click on one of the two arrows below the list containing office names in order to go to the next page.

- Click on the one of the arrows below the list of offices currently shown
- Scroll down and click on "Westminster" and then move to the right-hand box.

Is everybody on the right page?

Step 1 now has a check mark beside it.

Question: What do we do now?

Answer: Select time period

- Click on Select time period

You want the information for FY 2003. Highlight FY 2003 and move it to the right-hand box.

Step 2 now has a check mark beside it.

Steps 3 and 4 are optional. All the required steps are completed. Let's "Execute" the report.

Facilitator's note: *Wait until data is displayed.* **<PAUSE>**

As you can see, there are **ten** pages of Orphan PVIs in this particular report!!

Question: Does everyone remember what Pivot and Sort Buttons are from your online course?

Answer: Pivot and Sort Buttons allow you to sort data in various ways. They are located at the top of each column.

If Pivot and Sort Buttons are not available on your report, click on "View" and select "Show Pivot Buttons". Then click on "View" and select "Show Sort Buttons".

- From the "Orphan PVI Count" column, click on the "Sort "button (the up or down arrow beside the column header)

The top 7 items are all over 500 each and total 6,614 orphans!!

Notice the orphan PVIs that were being printed the most:

$.60
$.37
$.83
$.80
$3.85
$.74
$1.06

We have self-adhesive stamps available for five of these seven denominations. We also have combinations of stamps to equal the other two denominations.

Not only are the Retail Associates losing earned time at the window, it is very costly to the Postal Service to have unused stamps destroyed.

Almost 600 of these orphan PVIs are $3.85. Obviously, this is Priority mail. This is a good example of missed opportunities for revenue from value-added sales.

At an average of just one minute per transaction, the total time credit lost for just these 7 categories of orphan PVIs would be the equivalent of 110 hours!!! The total potential workhour loss for the year for **all** categories of orphan PVIs is 188 hours – or the equivalent of losing a Retail Associate for **over a month!!!**

Employees need to be educated about the negative impact of Orphan PVIs. In order to justify the workhours we should be receiving, this practice must be stopped!

We want to know which associates are printing these Orphan PVIs and the dollar value of each PVI.

In order to do this, we must drill. If the report did not open to a Simple Drill, then

- Click on "Data" and select "Drill".

Simple Drill will appear on the left-hand side above the report.

Is everyone on this page?

The drop-down box indicates that we have drilled to "Item Revenue Amount". We want to drill further to see which associates are printing these orphan PVIs. To do this, we must:

- Click on "Advanced Drill" beside the "to" box

Now we are at an advanced drill. The report shows:

- Item Revenue Amount
- Orphan PVI Count
- Orphan PVI Walk-In Revenue

We can now drill to the SSA, but first we want to define what we want included in our report.

We only want to include the top seven denominations in this report.

- First, click in the boxes beside the first 7 Item Revenue Amounts.
- Then click on "Include Item Revenue Amount Column in Report"
- Now, click on the "go" button beside the hierarchy level of SSA

**Facilitator's note: *<STOP>* *Wait until data is displayed. If the item amount column is not visible on a participant's screen, they failed to check the box "Include Item Amount Column in Report". In this case, have participants click on the "back" button twice, click on "Advanced Drill", and then repeat the steps in the 3 bullets above.*

The report is sorted by the highest number of Orphan PVIs printed by an individual SSA to the lowest number. Some of the largest number of orphan PVIs are printed by the same SSA (KMD2CJ).

This SSA printed 855 orphans @ .60 each, 597 @ .83, 350 @ $1.06, 249 @ .80, and 241 @ $3.85. This is a total of 2292 orphans, and at an average of one minute lost per orphan, this SSA alone has lost almost 40 hours of time earned.

Let's look at it this report from another view, by SSA.

- Click on the "Sort" button at the top of the SSA column.

Now the report is broken down by individual SSAs, and shows the number of orphan PVIs each one printed in the individual denominations we had pre-selected.

Let's scroll down and look at the SSA who has ID "KVG7NC".

This SSA has printed 388 orphan PVIS @ .37 and has printed a total of 773 orphans which is a loss of almost 18 hours of earned time.

If associates in your office are using orphan PVIs and skipping steps when accepting items for mailing, they may be missing great opportunities to grow revenue. These opportunities could include insurance, delivery confirmation, and other value-added sales.

In addition, your office is losing earned hours each and every time an orphan PVI is printed.

Associates must know that they are losing credited time when they print orphan PVIs. They say they need help at the window, but the figures may show that they do not need help. Most associates want to do a good job. They just do not realize what an impact orphan PVIs have on them and the Postal Service.

As stated earlier, we must eliminate orphan PVIs in order to ensure that mail pieces are bar-coded as necessary to fully utilize automated equipment. Associates **must** follow proper procedures when entering transactions.

Rip Chart – Page 11

Now, find and execute an orphan PVI report for your office. We're here to help if you have any questions. You will have the opportunity to view this report in the Summary module. It will be in your "History" folder or you can save it to "My Reports". The path is on the Rip Chart.

Facilitator note: Wait for everyone to execute their report.

Question: Are there any questions or comments about this report?

Now, to get back to our starting point – Shared Reports:

- Click on the "Shared Reports" tab.

Summary

In this module you learned to:

- Find and drill down to the "Orphan PVI" report
- Determine the number of orphan PVIs that have been generated
- Determine the Retail Associates who are printing Orphan PVIs
- Realize the negative impact of printing orphan PVI

Module 7

Distribution of Domestic Mail Class Sales by Associate

Facilitator's Prep Section

(DO NOT READ TO PARTICIPANTS)

Objective

The purpose of this module is to identify how Retail Associates are selling mail classes at the retail window. This report shows you the quantity, revenue, and percentage of total sales for each mail class.

Upon completion of this module, participants should be able to:

- Find the "Distribution of Domestic Mail Class Sales by Associate" report
- Determine what classes of mail Retail Associates are selling
- Compare product sales by Retail Associates
- Use the report to increase revenue

Length

15 minutes

Instructional Methods

Facilitative discussions
Hands-on activities

Instructional Materials

Train-the-Trainer Facilitator's Guide
LCD projector and screen
Computers (with Postal Blue Page Intranet access)
Rip Chart (Write the underlined information on a rip chart)

Supplies

Pens or pencils
Post-it notes for parking lot
Writing pads

Rip Chart Page 12 – Scenario 5
Jasper, IN – 1741250940

Rip Chart Page 13
Shared Reports>Mailing and Postage Reports>Distribution of Domestic Mail
Class Sales by Associate

Facilitator Prep Section Ends Here

Module 7

Distribution of Domestic Mail Class Sales by Associate

Objective

The purpose of this module is to identify what classes of mail Retail Associates are selling at the window. This report shows you the quantity, revenue, and percentage of total pieces for each mail class.

Upon completion of this module, you should be able to:

- Find the "Distribution of Domestic Mail Class Sales by Associate" report
- Determine what classes of mail Retail Associates are selling
- Compare product sales by Retail Associates
- Use the report to increase revenue

Introduction

We must continually look for opportunities to increase revenue. One of the greatest possibilities is to assure that Retail Associates are knowledgeable about and offer our expedited services first.

Mail class sales and profit margins are discussed in depth during the EAS Revenue Generation Training. The "Distribution of Domestic Mail Class Sales by Associate" report shows you what your Retail Associates are selling.

Facilitator's note: *Ensure that everyone is on the "Shared Reports" screen.*

Rip Chart – Page 12

Scenario (5): You are the Postmaster in Jasper, Indiana. You want to find a report that identifies what classes of mail are being sold by each Retail Associate and see if there are opportunities to increase revenue in Express and Priority Mail sales.

Question: We are looking for a report that tells us about what types of mailings are being handled by our associates.

Where should we go?

- Click on **"**Mailing and Postage Reports"

- Click on "Distribution of Domestic Mail Class Sales by Associate"

Step1 is to enter the 10-digit retail unit finance number and ID for Jasper, IN.

- Enter 1741250940 which is the ID for Jasper, IN.

Step 1 now has a check mark beside it.

- Click on "Select time period"

We want the information for FY 2004.

DO NOT GO AHEAD OF THE CLASS!! Stay with me as we proceed.

- Click on FY 2004
- Move FY 2004 to the right-hand box by clicking on the Forward Arrow

Oops, I actually wanted the information for FY 2003! How can I change this?

- Make sure FY 2004 is highlighted in the "Selections" box
- Click on Reverse Arrow
- Now click on FY 2003
- Click on the Forward Arrow

Step 2 has a check mark, and we are now ready to execute the report.

- Click on "Execute Report"

RDM is a tool that can be used to help manage your office. Remember it does not control you. **You** control it.

If you are already on your computer pulling required data from your district, this would be a good time to run reports.

You can also run multiple reports at the same time. You do not have to wait until a report has completely executed before you begin to pull another report. After you select "Execute" you can begin pulling another report.

Then later, perhaps when the mail is up, or after your carriers are out, or just simply when **you** have the time, you can click on the History folder and the reports that you had executed earlier will now be ready for you to review. You can then save them to "My Reports" if you wish.

Has everybody's report executed? Let's look at it.

The report is sorted into 7 columns:

- The 1st column shows the retail unit and ID we have selected, which is the Jasper Post Office.
- The 2nd column lists all of the SSAs
- The 3rd column is the FY we selected, which is FY2003
- The 4th column identifies each product
- The 5th column shows the total number of pieces mailed in each class
- The 6th column shows the percentage of all mail pieces
- The last column shows the percentage of mailing revenue

We want to look at some of the products. We will view and compare Express Mail, Priority, Parcel Post and Media Mail.

First, if anyone's report opened showing a simple drill or sort data to display box, close this by clicking on the "X" in the far right corner of the report.

- Click on the "Sort" button in the "Product" column heading
  (this is the up or down arrow beside the column title)

Right now we see "Bound Printed Matter" listed first in the product column.

- Scroll down to view the other products

Notice that there are two pages. We will look at the second page later.

Let's look at Express Mail Post Office to Addressee and see how the Retail Associates are selling this product.

In order to view this report better, we will lock the column headers. To do this:

- Click on "Format" at the top of the report page
- Click on "Lock Report Headers"
- Click on "Lock Column Headers" if it does not already have a check mark next to it

We naturally look immediately at who sold the most pieces of Express Mail Post Office to Addressee, but this can be misleading. The percentage of total mail pieces is the real indicator to determine whether a Retail Associate is selling from the top down.

Question: Which Retail Associate has the highest percentage of total mail pieces?

Answer: KZ8ZJF with 5.72%

Now, let's look at Media Mail.

- Scroll down to Media Mail

Question: Who has the highest percentage of Media Mail?

Answer: KH72RO with 3.64%

Question: Is this associate selling from the bottom up?

Answer: Not necessarily. Remember what we discussed in an earlier module. This could be an indication that they are mailing from the bottom up, but it also could be a customer mailing cassettes in a single transaction.

Remember, RDM does not give you the answers. It gives you questions. In order to learn the answers, you may need to observe the employee.

Now, let's scroll down and look at Parcel Post.

Question: Who has the highest percentage of Parcel Post?

Answer: KRT11Y with 16.39%

- Scroll down to the bottom of the report and click on "Page 2" so that we can look at Priority Mail.

Let's find that associate, "KRT11Y". Remember, his percentage for Parcel Post was over 16%.

Question: What is his percentage for Priority Mail?

Answer: 28.45%

Question: This associate has one of the highest percentages in both Parcel Post and Priority Mail. What do you think this means?

Facilitator note: *Allow for discussion. There could be various explanations.*

Answer: This indicates the associate may be asking all the right questions, but the customers chose Parcel Post over Priority Mail.

This report helps identify those on your staff who are your top sellers and identifies your weak sellers. As a manager, you can use this report to see where employees may be lacking in product knowledge or may not be asking the Mystery Shopper questions which drive revenue.

Question: Are there any questions about this report or how it can be used?

Now, run the same report for your own office. Remember to stop after you have executed the report. You will review this report in the Summary module.
Let us know if you need help.

Rip Chart – Page 13

Facilitator note: *Wait until everyone has clicked execute for their report.*

Once you execute, it will be placed into your History folder, and you can save it to "My Reports" if you wish. Now, to get back to our starting point – Shared Reports:

- Click on the "Shared Reports" tab.

Summary

In this module you learned to:

- Find and drill down to the "Distribution of Domestic Mail Class Sales by Associate" report
- Compare product sales by Retail Associates
- Determine if Retail Associates are selling from the top down or the bottom up
- Use the report to increase revenue

Module 8

Revenue by Mail Class and Special Services by Retail Unit and SSA

Facilitator's Prep Section

(DO NOT READ TO PARTICIPANTS)

Objective

The purpose of this module is to identify revenue by mail class and special services sold by retail associates.

Upon completion of this module, participants should be able to:

- Find the "Revenue by Mail Class and Special Services by Retail Unit and SSA" report
- Compare sales of products and services by Retail Associates
- Determine if Retail Associates are offering Special Services
- Share this report with Retail Associates to increase revenue

Length

30 minutes

Instructional Methods

Facilitative discussion
Hands-on activities

Instructional Materials

Train-the-Trainer Facilitator's Guide
LCD projector and screen
Computers (with Postal Blue Page Intranet access)

Supplies

Pens or pencils
Post-it notes for parking lot
Writing pads

Facilitator Prep Section Ends Here

Module 8

Revenue by Mail Class and Special Services by Retail Unit and SSA

Objective

The purpose of this module is to identify revenue by mail class and special services sold by the Retail Unit and SSAs.
Upon completion of this module, you should be able to:

- Find the "Revenue by Mail Class and Special Services by Retail Unit and SSA" report
- Compare sales of products and services by Retail Associates
- Determine if Retail Associates are offering Special Services
- Use the report and share this information with Retail Associates to increase revenue

Introduction

This is a useful report to see how your Retail Associates are doing compared to the office totals. You can show your Retail Associates what products and services they are selling and how many. Retail Associates can compare their scores to other Retail Associates in the office. You might want to encourage a little in-house competition, but you must be willing to reward their efforts.

Facilitator note: *Be sure everyone is on the Shared Reports page.*

You may have heard about the Carthage, Mississippi office, which has been recognized as a top performer in the Mystery Shopper Program. I'm going to pull up the Carthage office on the big screen; however, I want you to run the report for your individual office so you can compare your performance to Carthage.

Let's get started.

- Click on Mailing and Postage Reports
- Click on Revenue by Mail Class and Special Services by Retail Unit and SSA

Enter your Retail Finance Number and Unit ID number.

Question: If you don't know your unit finance number and ID, how could you find it?

Answer: Shared Reports> Search for> and then click on Search for Retail Unit Finance Number and Unit ID.
Facilitator note: *Carthage, MS Finance Number and Unit ID is 2713000051*.

- Click on "Select week"

- Click on the down arrow beside the drop-down box and scroll down to April 10, 2004 – April 16, 2004. If you were not on POS during this week, you will need to select another week of your choice.

As you can see, Execute Document is available.

- Click on Execute Document.

Facilitator note: *<STOP> Take a ten-minute break while documents are executing.*

Facilitator note: *Ensure that all participant reports have executed before proceeding.*

We will look at your report in just a minute. Please focus your attention on the big screen as we review the statistics for Carthage.

The top part of the report shows how the office is doing as a whole.

The bottom part of the report shows the performance of each individual Retail Associate.

You can compare each associate's percentages to the total office percentages for each mail product.

Let's look at the figures for the entire office first.

You can see the total mail pieces for that week, which for Carthage is 806 pieces.

Out of those 806 pieces, the report breaks down the percentage of each product or class of mail.

 For Carthage (on the screen), 5.71% of all mail pieces is Express Mail.

16.25% is Priority Mail.

69.48% is First Class.

4.84% is Standard Parcel Post.

Now I'd like to bring your attention to Special Services. As you can see, this

office added Special Services to 272 out of the 806 pieces – that's over 33%!!

The breakdown of those Special Services is 24 insured, 51 Confirmation services, and 197 other special services.

The percentages for Standard Parcel Post and All other Domestic Mail are minimal compared to the other mail classes. This indicates the associates are selling from the top down, which demonstrates their outstanding sales abilities.

Now, let's scroll down and look at some of the individual employees. The first SSA we want to look at is "XWODCO" at the very bottom of the page. The first column in the bottom part of the report shows the IDs for each SSA.

Facilitator note: *Driver will scroll down to SSA with the ID "XWODCO".*

As you can see by this report on the big screen, SSA, "XWODCO" had 59 total pieces. Out of that, he sold 29 special services. Almost 50%!! Outstanding!

If you think that was a fluke, let's scroll up and look at the next SSA, "XMHSQB". This SSA has 54 Special Services out of 131 pieces. Over 40% -- also outstanding!!

What this report shows is that these employees are asking the right questions – not only are they selling outstanding Special Services, we know from reports that they are also hitting 100% on their Mystery Shopper scores.

This shows that Mystery Shopper does drive revenue in a very, very positive way.

Facilitator note: *Now have participants review the report they ran for their office.*

Now that we've looked at Carthage, let's look at some of your numbers.

Now take a look at your report and see how you compare to Carthage. How are your employees doing?

Scroll to the top of your report first so we can compare office totals.

Facilitator note: *Ask the following questions. Allow participants time to answer each before proceeding to the next question.*

Question: Does anyone have a greater percentage of Express Mail than 5.71%?

Question: How about Priority Mail? Carthage has a percentage of 16.25. Can anyone beat that?

Question: Carthage has a whopping 69.48% in First Class Mail. Can anyone

beat that?

Question: Let's compare your office percentage in Standard Parcel Post. Carthage has a 4.84%. Does anyone have a lower percentage? Remember, this figure should be lower if your employees are selling from the top down.

Now you can compare the percentages from each SSA in your office to your total office percentages. Let's compare one of them now.

Question: Does any SSA in your office have a greater percentage of sales in special services than your total office percentage?

Answer: If so, then you need to observe what this employee is doing to achieve this percentage and share the success with your other employees. This is an excellent report to run contests for your office. The SSAs are competing against themselves. For example, in December you could run a contest on Confirmation Services. Whoever has the greatest increase from the prior month wins an award.

Now remember, you just ran this report, and even though we don't have the capability to print it out here, it will be in your "History" list or you can save it to "My Reports". So when you get back to your office, log-on and print this report so you can share it with your employees.

Are there any questions or comments about this module?

Now, to get back to our starting point – Shared Reports:

- Click on the "Shared Reports" tab.

Summary

In this module, you learned to:

- Find the "Revenue by Mail Class and Special Services by Retail Unit and SSA" report
- Compare sales of products and services by Retail Associates
- Determine if Retail Associates are offering Special Services
- Share this report with Retail Associates to increase revenue

Module 9

Stamps Only Sales

Facilitator's Prep Section

(DO NOT READ TO PARTICIPANTS)

Objective

The purpose of this module is to identify the number of visits at the window that result in purchases of stamps only and the number of non-stamp visits.

This report can be used to identify stamps only transactions that can be shifted to alternative sales channels. (APC, vending, consignment, ATM, etc.)

It can also be used to identify missed opportunities to sell stamps to customers who came to the retail counter for other services and products.

Upon completion of this module, participants should be able to:

- Find the "Stamps Only" report
- Find the number of stamps-only and non-stamp visits at their retail counters
- Use this report to move stamps only transactions to alternative sales channels
- Use this report to encourage associates to sell stamps with non-stamp transactions

Length

15 minutes

Instructional Methods

Facilitative discussion
Hands-on activities

Instructional Materials

Train-the-Trainer Facilitator's Guide
LCD projector and screen
Computers (with Postal Blue Page Intranet access)
Rip Chart (Write the underlined information on a rip chart)

Rip Chart Page 14 – Scenario 6
Eastern Area – Appalachian District – Bluefield Post Office – FY 2003

Rip Chart Page 15
Shared Reports>Mailing and Postage Reports>Stamps Only

Supplies

Pens or pencils
Post-it notes for parking lot
Writing pads

Facilitator Prep Section Ends Here

Module 9

Stamps Only Sales

Objective

The purpose of this module is to identify the number of visits at the window that result in purchase of stamps only and identify the number of non-stamp visits.

Upon completion of this module, you should be able to:

- Find the "Stamps Only" report
- Find the number of stamps-only and non-stamp visits at your retail counters
- Use this report to move stamps only transactions to alternative sales channels
- Use this report to encourage associates to sell stamps with non-stamp transactions

Introduction

In order for the Postal Service to succeed in a highly competitive market, we must ensure that we provide the best customer service possible.

We must make every effort to shift our sales of "stamps only" to alternative channels. This report will help to identify opportunities to reduce wait time in line.

We must also ensure that our associates are offering stamps to our customers every time they come to the retail counter for other products and services.

This encourages customers to conduct several transactions in one trip, which helps to create customer satisfaction and shorter lines.

In this module, you will learn how to analyze trends in customer purchases at your retail counter.

You will be able to pinpoint where there are opportunities for shifting some of those stamp sales to alternative sales channels.

Customers are not always aware of these alternatives. It is everyone's responsibility to educate our customers.

Facilitator's note: *Ensure that everyone is on the "Shared Reports" screen.*

Rip Chart – Page 14

Scenario (6): You are the Postmaster in Bluefield, West Virginia. Your retail window is extremely busy. You notice that many customers are purchasing only postage stamps when they visit, and you believe there are opportunities to move some of these sales to vending, stamps by mail or other alternatives. You want to see a report that will show you the number of visits and types of postage that is being sold in each visit.

Question: We are looking for a report about postage. What folder do we open?

Answer: "Mailing & Postage Reports"

- Click on Mailing & Postage Reports

Question: What folder should we open now?

Answer: "Stamps Only"

- Click on Stamps Only

This report can be used to identify "Stamps Only" transactions that can be shifted to increase customer convenience through alternative channels, such as APCs, vending, consignment, ATMs, on-line services, etc.

Facilitator note: *Wait for report to open.*

Our first step is to select a location.

We want you to try to drill to Bluefield, West Virginia, on your own. Stop after you have moved Bluefield to the right- hand box. Bluefield is in the Eastern Area and in the Appalachian District. If two Bluefield offices appear, select the first one.

Remember, you do not move anything over to the right side until you have made your final selections.

Facilitator's note: *Have everyone drill and move Bluefield over to the right-hand box. Make sure that everyone is on the same page.*

Step 1 has a check mark beside it to indicate that you have completed that step.

Question: What do we need to do now?

Answer: Select time period

- Click on "Select time period"

We want the information for FY 2003.

- Click on FY 2003 and move the information to the right-hand box.

Step 2 has a check mark beside it. You can now execute the report.

This report can be used to identify non-stamp visits and transactions that can be shifted to APCs, vending, Click-N-Ship and other on-line services.

It can also be used to show where we have missed opportunities to sell stamps to customers who came to our retail counter for other services and products.

Facilitator note: *Wait for the report to display.*

The report breaks down each visit to a post office into visit types.

For each visit type, the report contains the:

- Total Visit count
- Percentage of Stamps Only Visits
- Total Walk-In Revenue
- Walk-In Revenue per visit (revenue divided by number of visits)
- Percentage of Walk-In Revenue
- Transactions per visit

We are interested in the "Stamps Only" purchases and "Non-Stamp Visits".

- Click on the down arrow beside Data
- Click on "Select data to display"
- Put check marks in the following boxes

  o Stamps only less than/equal $1
  o Stamps only greater than $1
  o Priority Mail only
  o Booklet of 20 only
  o Coils only
  o Non-stamp visits

- From the Select Data to Display box, click "OK"

Facilitator note: *Wait until report has completed. Then discuss as a group.*

Look at the non-stamp visits. From this report we see that 59.6% (almost 60%) of these window transactions are non-stamp transactions.

If the non-stamp visits are large in number, this shows an opportunity to sell stamps to these customers while they are at the retail counter. This could grow revenue.

Look at the different "Stamps Only" visits.

Question: Which sells the most?

Answer: Booklet of 20 only.

This report shows that 16.7% of these customers want only a book of stamps.

Now look at the "Stamps only less than or equal to $1". Over 8% of the total customers are in this category. If you add the total of all the stamps only customers (including Stamps Only greater than $1 and Coils Only), it's over 40%.

Additionally, anytime you have stamps only sales greater than 25% you need to review your staffing, especially if you have a Postal Store. If you do not staff your cash wrap – you need to consider doing so. Remember, moving these customers out of our lines and directing them to alternative channels for stamps only purchases increases customer convenience and satisfaction.

Customers who continue to stand in long lines will eventually seek out more convenient ways of sending their mail. Your goal should be providing 5 minutes or less wait time in line.

Facilitator note: *Participants will now run this report for their offices – do NOT review now, these will go into the history folder.*

Now, you can run a "Stamps Only" report for your own office. Let us know if you need any help. This report will be in your History folder, and if you wish, you can save it to "My Reports". You will review this report in Module 11.

Rip Chart – Page 15

Facilitator note: Wait for everyone to run and execute their report.

Does anyone have any questions or comments about this module?

Now, to get back to our starting point – Shared Reports:

- Click on the "Shared Reports" tab.

Summary

In this module you learned:

- How to locate the "Stamps Only" report
- How to find the number of stamps only and non-stamp visits at your retail counters
- How you can use this report to move stamps-only transactions to alternative channels
- How to use this report to determine if there are opportunities for improvement in combining stamp sales with other transactions

Module 10

(DO NOT READ TO PARTICIPANTS)

Summary and Practice

Facilitator's Prep Section

Objective

The purpose of this module is to summarize what participants have learned, and to allow them to practice their skills by running reports for their own offices

Upon completion of this module participants should be able to:

- Find and drill down to different reports
- Perform advanced drilling
- Understand how to use reports to manage your office
- Recognize areas where more revenue can be generated

Length

35 minutes - Adjust accordingly – to keep class at 4 hours

Instructional Methods

Facilitative Discussion
Hands-on activities

Instructional Materials

Train-the-Trainer Facilitator's Guide
LCD projector and screen
Computers (with Blue Page Intranet access)
Practice Scenarios (Addendums 4 & 5)

Supplies

Pens or pencils
Post-it notes for parking lot
Writing pads

Facilitator Prep Ends Here

Module 10

Summary and Practice

Objective

The purpose of this module is to summarize what you have learned and to allow you to practice your skills by analyzing reports for your own offices.

Upon completion of this module, you should be able to:

- Find and drill down to different reports on your own
- Understand how to use these reports to manage your office
- Recognize areas where additional revenue can be generated in your office

Introduction

The reports we reviewed can be used as tools for managing your office.

They are extremely valuable in identifying areas where additional revenue can be generated.

They can be used to determine which Retail Associates are following established procedures.

The reports pinpoint both good and bad practices when using POS ONE.

Using these reports daily will help you be a successful manager.

Remember, you control the reports. You can run them in the morning and leave them in your History list until you are ready to read them.

Practice

Each of you should have executed reports for your own office as we went through the modules. You will now go to the "History" folder or to "My Reports" to view and analyze those reports.

Use the list that you were given earlier today to assist you in locating the reports in your "History" folder. Some reports will appear twice in your "History" folder because you ran one with us as a group and then ran one for your own office.

After you have completed this exercise, you can receive more practice by running other reports for your office. You can run these same reports again or

you can try some new ones from the list of practice scenarios given to you.

We are here to help you. Please let us know if you need assistance.

Facilitator note*: Pass out scenario list. Have the participants go to their History folder or "My Reports" to review the reports from their own offices. Allow participants time to analyze reports and practice.*

Are there any questions or concerns about what you have learned today?

Summary

In this module you learned to:

- Find and drill down to different reports for your office
- Understand how to use reports to manage your office
- Recognize areas where more revenue can be generated

That concludes our training. Does anyone have any questions or comments?

MODULE 11

Training Guidelines

Facilitator's Prep Section

(DO NOT READ TO PARTICIPANTS)

Purpose

The purpose of this module is to explain the guidelines for delivering Revenue Generation training.

Objectives

Upon completion of this module participants should:
- Know the intended audience for Revenue Generation EAS training
- Understand the importance of achieving commitment from all employees to generate additional revenue
- Know the timeframe for delivery of Revenue Generation EAS training
- Understand how to conduct the training
- Understand the requirements for facilitators

Length

30 minutes

Instructional Methods

Facilitative discussion
Hands-on activities

Supplies

Sign-in sheet
Post-it-notes for parking lot
Pens or pencils
Rip Chart for Instructors' Names
Rip Chart for Parking lot
Computer with LAN access
LCD Projector

Instructional Materials
Facilitator's Guide

Facilitator's Prep Section Ends Here
MODULE 11

<p style="text-align:center">Train-the-Trainer</p>

<p style="text-align:center">Training Guidelines</p>

Purpose

The purpose of this module is to explain the guidelines for delivering Revenue Generation training.

Objectives

Upon completion of this module you should:

- Know the intended audience for Revenue Generation training
- Understand the importance of achieving commitment from all employees to revenue generation
- Know the timeframe for delivery of Revenue Generation training
- Understand how to conduct the training
- Understand the requirements for facilitators

Introduction

Revenue generation is everyone's responsibility. We must work together as a team to accomplish the goals needed to be a successful business. One person cannot achieve this, but together we can do it! We are **One Team with One Dream.**

Target Audience for RDM Report Reading for Managers, Revenue Generation training

- Post Office Operations Managers (POOMs)
- Postmasters/Station Managers - POS ONE offices
- Officers in Charge (OICs) – POS ONE offices
- Supervisors/ Managers Customer Service – POS ONE Offices

Purpose of training POS ONE office managers

Assure all managers:

- Understand the products and services offered by the Postal Service
- Understand the reason for revenue generation training
- Understand they are a vital member of the USPS team
- Are committed to generating revenue

Importance of training employees

- Approved mandatory training for FY 2005
- Collaborative training initiative between Retail Operations, Labor Relations, National Association of Postal Service, National Association Postmasters of the United States, and the National League of Postmasters.

District Training

Each district selects district facilitators and the location of training. All facilitators must take this Train-the-Trainer course. They should be dedicated employees who possess people skills.

- 4 courses total

    o Revenue Generation Training for EAS employees (4 hours - face to face)

    o RDM Report Reading for Managers Revenue Generation (POS ONE offices only) (4 hours - face to face computer lab)

    o Revenue Generation Training for Retail Associates (2 types - either classroom or service talks)

    o Revenue Generation Training for Delivery Employees (2 hours - service talks)

EAS Training -
> 8 Hours Training for POS office EAS employees
>> 4 hours – Retail Data Mart (RDM)
>>> Must be conducted at a centralized location with a computer lab environment (1 student per machine)
>> 4 hours – EAS Revenue Generation Course
> Students must have completed the on-line RDM training prior to attending

Retail Associate - 4 Hours Training
> Classroom training – most effective and desirable
> On-site for qualifying units (17 service talks)

Delivery Employees - 2 Hours Training
>> ☐ Training for delivery employees will be provided by postmasters, managers or supervisors through 11 service talks.

*** All employees should be trained by end of FY 2005

Mandatory requirements for facilitators

- Must be POS trained (Front office, Back Office Closeout and Back Office Admin.)
- Must have completed the on-line RDM training prior to attending T3 training
- Must have a government travel credit card
- Must be willing to travel
- All facilitators will utilize training materials, and understand they must not deviate
- All facilitators must be highly motivated, and possess outstanding communication skills
- All facilitators must be comfortable with computer programs (i.e. Word, Excel, etc.)
- All facilitators must be committed to this initiative until all of the target audience has been trained

Course Information

One comprehensive training guide is available for each course. This guide contains both the end user training, and the train-the-trainer training. All course materials are available on the delivery and retail website, and can be downloaded and printed for your use. These guides are not to be distributed to participants.

Each module is broken into 2 sections. The facilitator prep section, and the course module. Each facilitator prep section will help you to prepare for your training session. It lists supplies and materials that will be needed to properly conduct the training. Do not read this section to the course participants. Additionally, any materials that are to be distributed to the participants will be identified in this section.

The module section contains facilitator notes which will be in bold type. Do not read these to your students. These notes are to help you facilitate the course with ease. They will also guide you through any navigation that is required.

It is extremely important you review all materials prior to teaching, and do not deviate from the training materials. It is important to have all reports from this training session in your history folder prior to the start of each classroom session. This is what you may have to use if there are any problems.

Each classroom course must be taught by a Postmaster and a Manager/ Supervisor Customer Service who has completed the Train-the-Trainer course. Make sure a sign-in sheet is available, completed and submitted to your PEDC. All students must have this training entered into the National Training Database

in order to receive training credit. Check with your district PEDC for any additional requirements.

The number of participants in each training session will impact your training style. An extremely large class will need to stay focused in order to cover all the materials correctly and consistently. It is very important you pay attention to the timing of each module. This will ensure you won't have to cut any module short to get done on time. Put yourself on a time schedule and stick to it! Module 10 – which is the Summary and Practice module will need to be adjusted to keep within the 4 hour guidelines. Make sure you provide participants with expectations of promptness when they return from breaks.

Additional Information

All training documents can be printed from the "Delivery and Retail" website.

All facilitators should work with their local IS department to ensure they have proper technical support before and during each training session.

For facilitators teaching the RDM Report Reading for Managers course it is important to enforce a 1 to 1 ratio of participants to computers. (Students must come prepared to this course with their password and log-on id).

Audio/Visual equipment should be procured and set up prior to class. Make sure you check all computers. This includes a LAN line. A LAN line is needed for navigation through our websites.

Summary

Revenue generation is everyone's responsibility. We must have everyone's commitment in order to assure success. It is the responsibility of facilitators to provide quality training to ensure that everyone understands their roles and responsibilities in achieving our goals. Remember, we are **One Team - One Dream.**

ADDENDUM 1

RIP CHARTS

Page 1- Retail Data Mart (RDM) Revenue Generation Report Analysis Training-
Course # 41201-29

Page 2- Names of Facilitators
Phone numbers for emergencies

Page 3- Your name and work location
What you know about Retail Data Mart
What you expect to get from this training

Page 4- EDW umbrella (see addendum 3)

Page 5- Southeast Area- Tennessee District
POOM 3- December 2003

Page 6- Shared Reports>Flash Reports>POOM>Monthly POOM Support

Page 7- Main Post Office- Inman, SC
Finance Number and Unit ID: 4541600349

Page 8- Inman, SC- 4541600349- March 2004

Page 9- Shared Reports>Flash Reports>Retail Unit>Monthly-Yearly Retail Unit
Flash

Page 10- Western Area- Colorado/Wyoming District- Westminster Post Office
FY 2003

Page 11- Shared Reports>Sales Reports>Revenue>Orphan PVI

Page 12- Jasper, IN- 1741250940

Page 13- Shared Reports>Mailing and Postage Reports>Distribution of Domestic
Mail Class Sales by Retail Unit and SSA

Page 14- Eastern Area- Appalachian District- Bluefield Post Office- FY 2003

Page 15- Shared Reports>Mailing and Postage Reports>Stamps Only

Retail Data Mart

(RDM)

Revenue Generation

Report Analysis Training

Course # 41201-29

Names of Facilitators
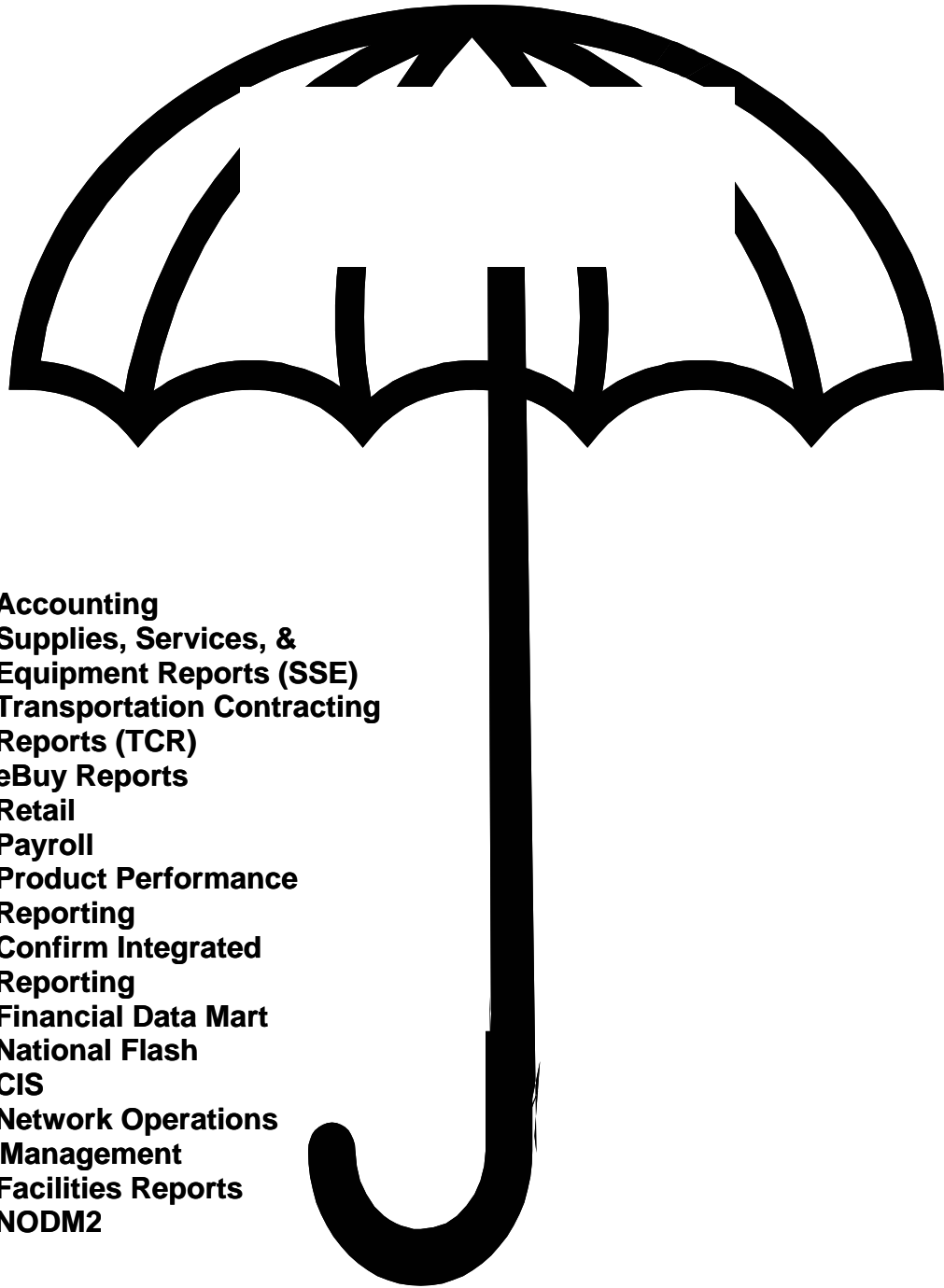
Phone numbers for emergencies

Your name

Your work location

What you know about
Retail Data Mart

What you expect to get
from this training

EDW umbrella

- **Accounting**
- **Supplies, Services, & Equipment Reports (SSE)**
- **Transportation Contracting Reports (TCR)**
- **eBuy Reports**
- **Retail**
- **Payroll**
- **Product Performance Reporting**
- **Confirm Integrated Reporting**
- **Financial Data Mart**
- **National Flash**
- **CIS**
- **Network Operations Management**
- **Facilities Reports**
- **NODM2**

Southeast Area

Tennessee District

POOM 3

December 2003

Shared Reports>

Flash Reports>

POOM>

Monthly POOM Support

Main Post Office

Inman, SC

Finance Number and Unit ID:

4541600349

Page 7

Inman, SC

4541600349

March 2004

Shared Reports>

Flash Reports>

Retail Unit>

Monthly-Yearly Retail Unit Flash

Western Area

Colorado/Wyoming District

Westminster Post Office

FY 2003

Shared Reports>

Sales Reports>

Revenue>

Orphan PVI

Jasper, IN

1741250940

Shared Reports>

Mailing and Postage Reports>

Distribution of Domestic Mail Class Sales by Retail Unit and SSA

Eastern Area

Appalachian District

Bluefield Post Office

FY 2003

Shared Reports>

Mailing and Postage Reports>

Stamps Only

ADDENDUM 2

COURSE MODULES

Module 1- Introduction to Retail Data Mart (RDM) Revenue Generation
           Report Analysis Training

Module 2- Log-on and Access Retail Data Mart

Module 3- Monthly POOM Support

Module 4- Search for Retail Unit Finance Number & Unit ID

Module 5- Monthly-Yearly Retail Unit Flash Report

Module 6- Orphan PVI

Module 7- Distribution of Domestic Mail Class Sales by Associate

Module 8- Revenue by Mail Class and Special Services by Retail Unit and SSA

Module 9- Stamps Only Sales

Module 10- Summary and Practice

ADDENDUM 3

EDW umbrella

Enterprise Data Warehouse

- Accounting
- Supplies, Services, & Equipment Reports (SSE)
- Transportation Contracting Reports (TCR)
- eBuy Reports
- Retail
- Payroll
- Product Performance Reporting
- Confirm Integrated Reporting
- Financial Data Mart
- National Flash
- CIS
- Network Operations
- Management Facilities Reports

- NODM2

ADDENDUM 4

PRACTICE SCENARIOS

1. You are a POOM in your district. You want to look at the Monthly POOM Support flash to see how all of your offices on POS ONE are doing. You know that the figures in Retail Activity should be positive. Find the report and determine if your district needs improvement in some areas of retail productivity.

2. Run a Monthly-Yearly flash report for your own office and identify any areas that need improvement.

3. You want to know how much media mail is being sold by each of your Retail Associates.

4. You want to know which Retail Associates are printing orphan PVIs in your office.

5. You want to compare your office with another office but you don't know their unit finance number or unit ID. Find a unit finance number and unit ID for one of your neighboring post offices.

6. You are looking for ways to divert stamps only sales away from your retail counter. You need to know exactly how many of these type sales are occurring.

7. You want to increase your revenue. You think there are probably missed opportunities at your retail counter for selling delivery confirmation and insurance. You need to run a report to verify this, and identify areas that can be improved.

ADDENDUM 5

PRACTICE SCENARIOS

1. You are a POOM in your district. You want to look at the
   Monthly POOM Support to see how all of your offices on POS ONE are
   doing. You know that the figures in Retail Activity should be positive. Find
   the report and determine if your district needs improvement in some areas
   of retail productivity.

   Hint: Start at "Shared Reports" → "Flash Reports" → "POOM"→ "Monthly
   POOM Support"→ Select district and drill to POOM → Select POOM →
   Select month→ Execute Document

2. Run a Monthly-Yearly flash report for your own office and identify any
   areas that need improvement.

   Hint: Start at "Shared Reports" → "Flash Reports" → "Retail Unit" →
   "Monthly-Yearly Retail Unit Flash" → Enter your own Retail Unit Finance
   Number and Unit ID → Select month→ Execute Document

3. You want to know how much media mail is being sold by each of your
   Retail Associates.

   Hint: Start at "Shared Reports" → "Mailing & Postage Reports" →
   "Distribution of Domestic Mail Class Sales by Associate" → Enter your
   retail unit finance number and unit ID → Select time period → Execute
   Report

4. You want to know which Retail Associates are printing orphan PVIs in
   your office.

   Hint: Start at "Shared Reports" → "Sales Reports" → "Revenue" →
   "Orphan PVI" → Select your area and drill to district → Select your district
   and drill to your post office → Click on your post office and move to the
   right-hand box → Click on "Select Time Period" → Choose a FY →
   Execute Report→ Click on "Data" and select "Drill" → Under "Simple Drill,"

next to "Item Revenue Amount," click "go"→ Next to "Select Hierarchy Level: SSA," click "go"

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5. You want to compare your office with another office but you don't know their unit finance number or unit ID. Find a unit finance number and unit ID for one of your neighboring post offices.

   Hint: Start at "Shared Reports" → "Search for" → "Search for Retail Unit Finance Number and Unit ID → Type in the name of one of your neighboring post offices in the "Selection Summary" box → Execute

6. You are looking for ways to divert stamps only sales away from your retail counter. You need to know exactly how many of these type sales are occurring.

   Hint: Start at "Shared Reports" → "Mailing & Postage Reports" → Stamps Only" → "Drill to your area" → → "Drill to your district" → "Drill to your Retail Unit"→ and move to right-hand box → Click on "Select Time Period" → Execute Report

7. You want to increase your revenue. You think there are probably missed opportunities at your retail counter for selling delivery confirmation and insurance. You need to run a report to verify this, and identify areas that can be improved.

   Hint: Start at "Shared Reports" → "Mailing & Postage Reports" → "Revenue by Mail Class and Special Services by Retail Unit and SSA" → Enter finance number and unit ID → Select week → Execute Document