



Sales and Services Associate Training

Administrator's Guide

Course #23501-02

NSN #7610-05-000-0333

May 2006

**Employee Development & Diversity
Retail Operations
Washington, D.C.**

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Administrator's Guide
Course #23501-02
NSN #7610-05-000-0333

United States Postal Service
Employee Development & Diversity
Retail Operations
475 L'Enfant Plaza SW
Washington, D.C.

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A Commitment to Diversity

The Postal Service is committed to fostering and achieving a work and learning environment that respects and values a diverse workforce. Valuing and managing diversity in the Postal Service means that we will 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 of 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. Instructors and class participants are expected to support this commitment.

If you find course material that is presented in the classroom or in self-instructional format that does not follow these guidelines, please let an instructor know immediately.

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, and to do what is right for our employees and the communities we serve, thereby ensuring a competitive advantage in the global marketplace.

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Use of Training Materials

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Preface

The Sales and Services Associate Training program is the result of a labor/management study team's efforts to improve training for sales and services associates and window clerks. The team consisted of experienced classroom window academy trainers from across the country, representatives of the American Postal Workers Union (APWU), and managers/supervisors from the field and USPS Headquarters offices.

The 2005 revision reflects the continued collaboration of the American Postal Workers Union with postal management in providing current and effective training for new sales and services associates.

This course is designed to provide sales and services associates with the basic skills and knowledge to perform the duties of their positions. The course is also designed to provide sales and services associates and window clerks with refresher training.

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Purpose of Guide

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

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

Purpose of Course

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

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



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

This program will provide a basic working knowledge of interpersonal skills, customer relations, selling techniques, postal products and services, as well as financial procedures and responsibilities to Sales and Services Associates. Given the various duties performed by postal personnel at retail counters, other training may be required upon completion of this course. In addition to SSA Training,

Retail employees assigned to postal stores will need to take a Postal Store training course. Retail employees who will accept bulk mailings should take additional training as appropriate (either online or as dictated by local policy).

Course Structure

The Sales and Services Associate Training program, which is designed for delivery through the training network, is a combination of classroom instruction, followed by a qualifying examination, and On-the-Job Training (OJT).

The classroom training provides training on those elements common to all Sales and Services Associates, such as interpersonal skills, customer relations, selling techniques, postal products and services, as well as financial procedures and responsibilities. Modules are presented in a classroom environment. Instructional methodologies include demonstration, role-play, presentation, and reading.

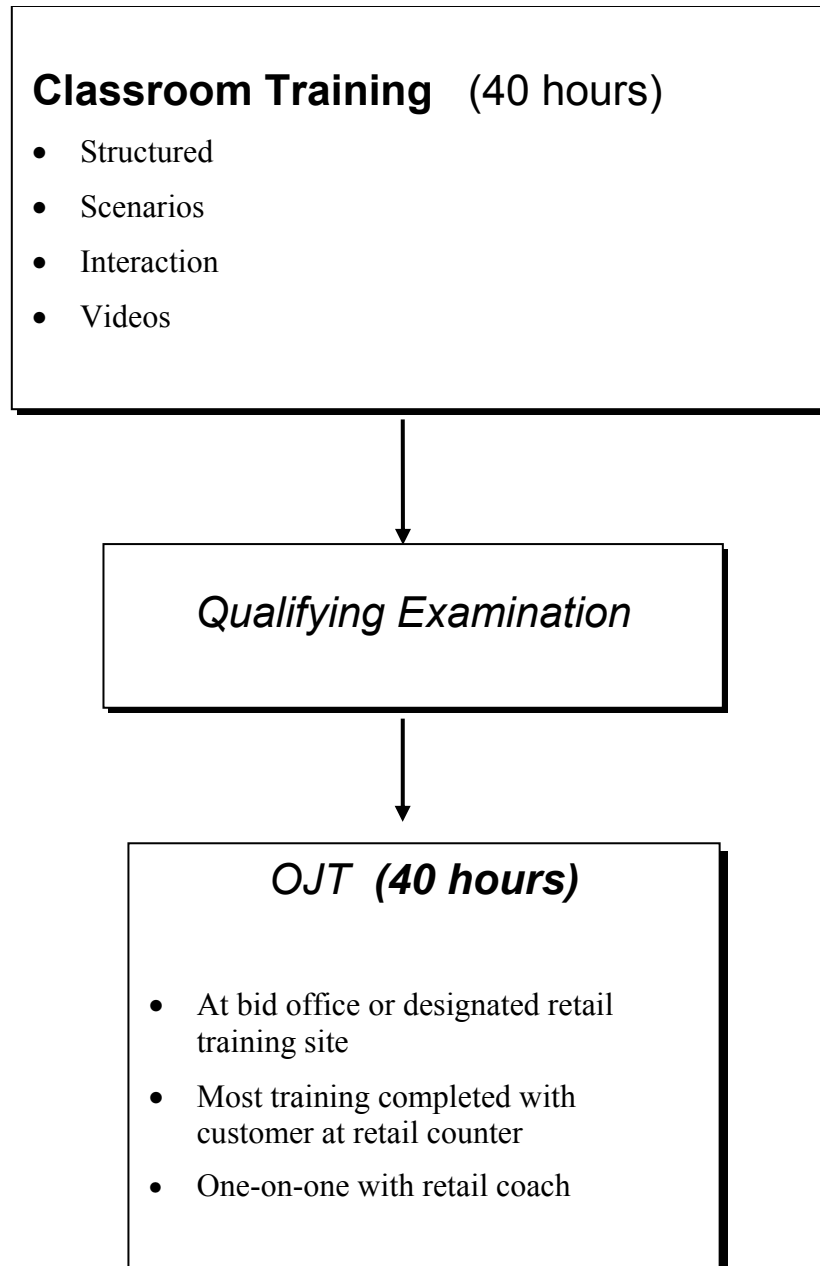
Once the classroom training is completed, the future associate is scheduled to take the qualifying examination. ***It is recommended that the qualifying examination be scheduled on the first workday following completion of the classroom training.***

When the associate has successfully passed the qualifying exam, a Retail Coach provides On-the-Job Training (OJT). It is recommended that the OJT be administered in five consecutive days immediately following the successful completion of the qualifying exam. ***The OJT must be completed within 14 calendar days upon the completion of the qualifying exam.*** The 14-day time period does not include any scheduled leave of the future associate during the same time period.

The On-the-Job Training (OJT) moves the future associates to their bids or assigned units, or in some cases to designated retail training sites where they work one-on-one with retail coaches. During this time, the Retail Coach will focus upon reinforcing information provided during the classroom portion of the training, retail equipment, revenue generation, proper transaction workflows, and proper financial procedures.

Note: Refer to Figure 1 for a graphic representation of the training process.

Figure I
Sales and Services Associate Training
Process Flowchart



Course Description

Classroom Training

The sales and services associate classroom training provides training on those elements common to all sales and services associates, such as interpersonal skills, customer relations, selling techniques, postal products and services, as well as financial procedures and responsibilities. Modules are presented in a classroom environment. Instructional methodologies include demonstration, role-play, video, presentation, and reading.

Class Duration

The classroom portion of the Sales and Services Associate Training program takes 40 hours.

Class Size

The recommended class size includes a minimum of four and a maximum of 21 students. At a minimum, having four future associates allows for classroom interaction, group exercises, participation in role-play, and future associates/classroom Instructor discussions. The Manager of Training, will determine the number of future Associates for each class based on the ratio of Classroom Instructors to future Associates. The recommended classroom ratio is 6 to 1 (6 future associates to 1 classroom instructor. If an office only has one future associate for training, local officials will determine the need to conduct the training. Management will not provide SSA On-the-Job training to any bargaining unit employee who has not successfully completed the classroom portion of the training and passed the qualifying exam. Bargaining employees who have not passed the qualifying exam are prohibited from working the window. Not to do so compromises Postal Service retail professionalism, customer relations, service commitments, and accountable funds.

Qualifying Examination

The qualifying examination is administered at the end of the classroom training program. *Only a certified examiner may administer the qualifying examination, and the examiner may NOT be the instructor for the course.*

☞ *Note: The qualifying examination should be administered on the first workday following the completion of the classroom portion of the training.*

Retesting Policy

All trainees who fail the qualifying examination at the end of training must wait 180 days before being able to take the test again. As the qualifying exams can only be given at the end of the classroom training program, all individuals must be retrained in the classroom as well.

Authorization to retest before the 180 days is normally sought when there is a circumstance where the incorrect series or obsolete material was used or there were difficulties during the administration of the exam – disturbances, timing errors, etc. – which did not provide the applicant a fair opportunity to demonstrate his/her qualifications for the exam. Exam administrators are familiar with the documentation requirements in such instances.

Requests for retest within 180 days, in cases where there were no defects in the original examination process, must be submitted to NTAC (National Test Administration Center). Requests must be accompanied by a letter from the Manager, Human Resources providing a complete explanation for the proposed exception to the 180-day retest period. Requests may be submitted for higher level review.

If an EEO complaint or grievance is filed by an employee alleging a problem during the test, NTAC can provide assistance in determining whether a proposed settlement is reasonable. If the resolution is that they be provided another opportunity to take the exam, the Manager, Human Resources submits a letter to NTAC with a brief explanation for the files.

An office cannot approve a retest for an examinee without NTAC's concurrence. Failure to obtain NTAC's approval will result in the invalidation of retest scores.

Retest decisions are not made by local managers.

Final Selection

The future associate must correctly answer 80% of the questions on the exam, and complete 40 hours of On-the-Job training with a retail coach in order to be deemed qualified and eligible to assume the bid or assignment.

On-the-Job Training


A thorough, well-documented, On-the-Job training process is critical to the success of the Sales and Services Associate Training program. As the OJT is based on the Sales and Services Unit Profile of the future associate's gaining office, future associates may have slightly different On-the-Job Training experiences.

The On-the-Job training must be conducted one-on-one between the retail coach and the future associate. This one-on-one training should occur during the normal transaction of business at the retail service counter. One-on-one training is defined as the retail coach and the future associate working at one retail service counter or in the back office. The retail coach may role-play examples of specific transactions with the future associate. ***Retail coaches must make every effort to conduct the On-the-Job training by mixing role-playing and customer interactions.***

Hours spent in training will be properly documented on PS Form 2432, *Individual Training Progress Sheet*, on a daily basis. Once training forms have been completed they must be forwarded to the district PEDC for entry into the National Training Database (NTD)..

In instances where it is not possible for the future associate to receive OJT at their bid or assigned office, a training site should be established. To ensure the highest quality On-the-Job training, a training site should be defined as one where the postmaster level is equal to or greater than an EAS-21 ranking. Each OJT training site *should have a minimum of three fully-equipped retail service counters that can adequately accommodate the On-the-Job training experience without negatively impacting service to retail customers, regardless of the level of office.* Any office, station or branch selected to conduct the On-the-Job training portion of the training should have sufficient customer volume to provide all the transactions that the trainee will be required to know in order to be proficient in their assigned retail office duties.

If your district has offices below the level of EAS-21 with sufficient customer traffic to support the OJT, they can be used as training sites to accommodate IRT or manual On-the-Job training.

 ***NOTE: It is preferred that the On-the-Job training take place in the future associate's bid or assigned office.***

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

During the On-the-Job training, future associates, with the retail coach present, must be issued a retail cash or stamp credit consignment. PS Form 3369, *Consigned Credit Receipt*, must be prepared in triplicate by the person consigning the credit. The future associate who accepts responsibility for the credit must date and sign the Form according to Handbook F-1, Post Office Accounting Procedures and procedures of Article 28 of the National Agreement. During the On-the-Job training, the future associate must be given a retail credit count and the credit will be closed out according to the procedures in Handbook F-1. ***The retail coach must be present during the consignment and final count of the future Associate's accountability.***

OJT Duration

On-the-Job training takes 40 hours. On-the-Job training is to be conducted one-on-one—one retail coach and one future associate. It is important that a retail coach review and understand each of the transactions to ensure that the workflow is taught properly, making sure current information and manuals are being used and provided. The Self Assessment Worksheet provides information that the retail coach should review with the future associate before the training begins, as well as the equipment needed to successfully complete the transaction.

Training Documentation

Classroom Training

The following document is used to facilitate the completion of the sales and services associate classroom training:

PS Form 2432, Individual Training Progress Sheet

Hours spent in training will be properly documented on PS Form 2432, *Individual Training Progress Sheet*, on a daily basis. Once training forms have been completed they must be forwarded to the district PEDC for entry into the National Training Database (NTD).

On-the-Job Training

The following document is used to facilitate and complete the certification of the On-the-Job training:

PS Form 2548, *Individual Training Record*

Training Hours and Schedules

The training and qualifying examination must be given on-the-clock. Time for the future associate and retail coach will be recorded as follows:

- Record and charge all time in class or study as training hours to the ***gaining retail unit***. This applies when the future associate is observing the retail coach or, when the retail coach is observing the future associate.
- Charge the time used for the written examination to ***training***.

If, during the future associate's training, it becomes necessary to change the scheduled hours of work, the change may only be accomplished in accordance with the procedures specified in the Employee and Labor Relations Manual (ELM).

- Use the National Training Database (NTD) to record sales and services associate training hours.
 - Course #23501-02 should be used to record students' completion of the entire training program (classroom and OJT)
 - Course #23501-10 should be used to record that students have completed the qualifying examination.

Selection of Classroom Instructors

The careful selection of craft employees as classroom instructors is critical to the success of the sales and services associate training program.

The Manager of Training, along with other appropriate managers, will select a sufficient number of classroom instructors.

As classroom instructors are needed, not to exceed (NTE), senior qualified ad-hoc duty assignments should be posted. All postings should be filled in accordance with the APWU National Agreement. All sales and services associates and window clerks with one year of continuous retail experience and holding a retail duty assignment at the time of consideration are eligible to bid. Each volunteer must complete PS Form 1717, Preferred Assignment Multiple Bid Card or electronic equivalent.

Employees voluntarily bidding for this position are notified of the intention to use information contained in official records, available as of the closing date, to determine qualification. If available evidence of your qualification is incomplete, please take action to provide the Manager of Training, and/or the Manager, Retail, with the appropriate information to update our records prior to the bid closing date.

This decision as to the number of classroom instructors is left to the discretion of the district training office. The decision should take into account availability of instructors, commuting distance to the classroom, interaction between the classroom instructor and the district training office, as well as overall business and cost considerations. If local offices fail to produce a suitable number and caliber of classroom instructor volunteers, the area of coverage may be expanded to fill the necessary classroom instructor needs.

The primary classroom instructors for sales and services associate training should be selected on a voluntary basis from the following retail experienced positions:

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

- Distribution and Window Clerk, PS-5;
- Distribution, Window, and Mark-Up Clerk, PS-5

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

Classroom instructors must voluntarily accept the assignment. Therefore, any changes in schedules to perform instructor duties will be considered voluntary and not subject to out-of-schedule premium.

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

Special Considerations

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

Training Requirements

Once selected, classroom instructors must be trained in instructional methods and coaching skills before they are utilized as trainers. Selected classroom instructors must successfully complete Facilitative Instructor Workshop, Course #21258-00, and On-the-Job (OJI Certification) Training, Course #23501-01.

Because of their classroom experience and OJT training, classroom instructors will also be able to serve as retail coaches when vacancies or absences occur.

Upon the recommendations and approval of the Manager of Training, the classroom instructor is issued a certificate of completion of training.

Within six months of selection, classroom instructors must attend and/or observe at one classroom session of the sales and services associate training program. This will help update their technical skills, as well as address any issues concerning elements of the course.

Every two years, classroom instructors will be required to successfully complete an FIW/OJT refresher training class.

Selection of Retail Coaches

The careful selection of craft employees as retail coaches is critical to the success of the sales and services associate training program.

The Manager of Training, along with other appropriate managers, will select a cadre of retail coaches. The decision as to the number of retail coaches is left at the discretion of the district training office. The decision should take into account availability of coaches, commuting distance if training at units other than their own, interaction between the retail coach and the district training office, as well as overall business and cost considerations.

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

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

Retail coaches must have one year of continuous retail experience in one or more of the retail positions listed and hold one of the retail duty assignments at the time of consideration.

Retail coaches must voluntarily accept the assignment. Therefore, any changes in schedules to perform instructor duties will be considered voluntary and not subject to out-of-schedule premium. Retail coaches may voluntarily go on-site to conduct OJT.

Special Considerations

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

Training Requirements

Once selected, retail coaches must be trained in instructional methods and coaching skills before they are utilized as trainers. Selected retail coaches must complete On-the-Job Training (OJI Certification), Course 23501-01.

Upon the recommendations and approval of the Manager of Training, the retail coach is issued a certificate of completion of training.

Retail coaches expected to facilitate the SSA OJT training on the POS ONE System must have successfully completed the POS ONE Front Office course. This course can be obtained from the POS ONE website.

Within six months of selection, retail coaches must attend and/or observe at least one classroom session of the sales and services associate training program. This will help update their technical skills, as well as address any issues concerning elements of the course.

Every two years, retail coaches will be required to successfully complete an OJT refresher-training course.

Program Responsibilities

Manager of Training

Before the Training

- Select, train, and certify classroom instructors and retail coaches in cooperation with functional managers. An adequate number of certified classroom instructors and retail coaches should be maintained. The success of the sales and services associate training program will depend upon the professional integrity and high caliber of the classroom instructors and retail coaches who are selected to conduct the sessions, as outlined in this Administrator's Guide.
- Ensure that classroom instructors are provided up to 8 hours of preparation time before administering sales and services associate classroom training. This will vary, for the first SSA class as much as 8 hours will be needed whereas, by the third class only 4 to 6 hours will be needed.
- Ensure that retail coaches are provided 4 hours of preparation time before administering On-the-Job training, and 4 hours post time.
- Obtain proper identification badge for the trainee.
- Notify unit manager where OJT will take place and ensure that preliminary set-ups for retail equipment are in place (i.e. POS – assign roles, request log on Ids, etc.).

During the Training

- Invite the installation head/designee to “open” the classroom session to demonstrate local management’s commitment to sales and services associate training. Such participation adds credibility to the program.
- Prepare class rosters. Class rosters should contain the start date, program number and title, instructor’s name, program length, and location. Rosters should be completed during the first day of the class.
- ***Future associate absences during the sales and services associate training program, while undesirable, may occasionally be unavoidable:***
 - **Classroom:** If a future associate misses more than one day of classroom training, the future associate should be removed from the training and rescheduled. Absences from the classroom of one day or less will require make-up time. Make-up classroom time may be with a classroom instructor or may be administered on a self-study basis.
 - **OJT:** If a future associate misses more than one day of OJT, the future associate should be removed from the training and rescheduled. Absences from the OJT of less than one day will require make-up time. Make-up OJT must be conducted one-on-one between the future associate and the retail coach
- If the future associate withdraws from the sales and services associate training program, handle this according to Article 37.3.F.7 of the National Agreement.
- Maintain quality control of the classroom instructors and retail coaches. The successful delivery of sales and services associate training depends upon the integrity of the training materials, the professionalism of the instructors, and the support of functional managers. The training staff, with the support of functional field and district managers will monitor quality control and compliance of the program.
- Prepare PS Form 2548, Individual Training Record, and PS Form 2528, On-the-Job Training Certification, as soon as names are received.
- Ensure that instructors review training materials and use Postal Bulletins and/or manuals to temporarily update training materials, as needed. Revised materials will be periodically distributed to the district training offices from Employee Development.
- Oversee the administration of the sales and services associate training. This responsibility includes coordinating with the appropriate managers the resources needed to administer and conduct the training. The course must be administered according to the guidelines in the National Agreement and this Administrator’s Guide. When part-time flexible (PTF) employees are assigned retail duties, they will be subject to the same qualification procedures as employees who bid for retail duty assignments.

- Within six months of selection, classroom instructors and retail coaches must attend and/or observe at least one classroom session, and observe one OJT session of the sales and services associate training program. This will help update their technical and instructional skills, as well as address any issues concerning elements of the course.
- Every two years, classroom instructors and retail coaches will be required to successfully complete an FIW or JIT refresher training class.

Manager, Retail (Or Designee)

Before the Training

- Coordinate with the Manager of Training (or designee), the selection of On-the-Job training sites.
- Coordinate with the Manager of Training, careful selection of classroom instructors and retail coaches. The instructors and coaches should be role models for new sales and services associates.
- Ensure that retail coaches are provided adequate time to prepare before administering structured on-the job training.

During the Training

- Support the training staff by providing supplemental materials and manuals, retail coaches, and guest subject matter experts, to ensure that local policies, procedures, and issues are addressed in the sales and services associate training program.
- Assist the training staff to ensure that the training is administered and conducted according to this Administrator's Guide, as well as postal policies and procedures.

After the Training

- Support the training staff by providing supplemental materials, guest subject matter experts.
- Reinforce skills and knowledge by postmasters/managers, Customer Services with information to help sales and services associates and window clerks apply newly acquired skills On-the-Job.
- Support postmaster/managers by providing job aids that help keep sales and services associates current on postal products and services.
- Update retail offices on any changes in policies and procedures that involve postal products and services and/or retail operations.

The above strategies are essential to help sales and services associates be successful in their positions after completion of the sales and services associate training program.

Future Associate's Manager/Postmaster

Before the Training

- Coordinate with the district training office or the servicing PEDC to schedule and notify the future associate of the scheduled sales and services associate training classes.
- In order to be issued a password to work on the POS ONE system, future associates must complete a PS Form 1357. It is your responsibility to ensure this form is completed properly and submitted prior to the future associate reporting for training.
- Explain travel policy and procedures to the future associate. Assist the future associate in securing driving directions, overnight lodging, or air travel arrangements.
- Thoroughly review the course objectives with the future associate before the beginning of the classroom training.
- Ensure that the retail coach is given adequate time to prepare before administering on-the job training; 4 hours preparation prior, and 4 hours post time.
- Ensure that the retail coach is present during consignment of the future associate's accountability.

During the Training

- Ensure that equipment and supplies are ordered and on-hand for the newly trained sales and services associate.

After the Training

- Reinforce skills and knowledge by helping sales and services associates and window clerks apply newly acquired skills On-the-Job.
- Support sales and services associates and window clerks by providing additional training experiences, having reference materials, such as manuals, handbooks, and bulletins available for them to use.
- Have job aids available at work sites to help keep retail coaches current on postal products and services.
- Update retail coaches and sales and services associates on any changes in policies and procedures that involve postal products and services and/or retail operations.
- **Ensure that the retail coach is present during the final count of future associate's accountability.**

Classroom Instructors

Before the Training

- Classroom instructors will need 8 hours of preparation time before administering the sales and services associate classroom training. This will vary, for the first SSA class as much as 8 hours will be needed whereas, by the third class only 4 to 6 hours will be needed.
- Thoroughly review the training materials. In order to conduct a successful training session, it is essential that the instructor be familiar with the training materials and instructional methods used. Classroom instructors must observe and/or take the classroom portion of the training within six months of selection to become thoroughly familiar with the content and lesson plans.
- Ensure all materials are current and available. When handouts and reference materials are needed, it is the Instructor's responsibility to have them ready to use and/or distribute.
- Refer to instructions in each module to determine classroom equipment and support materials needed and ensure that they are in place before the start of the class.
- Arrange the classroom so that it comfortably accommodates the number of scheduled future associates.
- Ensure that the training room is well lit and sufficiently ventilated.

During the Training

- Provide the necessary learning experiences that actively engage the future associate through adult learning techniques, such as demonstration, role-playing, presentations, etc.
- Complete class roster for sales and services associate training. The roster must be completed during the first day of class. ***If a future associate leaves the class after the roster is completed, it is the classroom instructor's responsibility to notify the training department.***
- Maintain a positive attitude. This training represents a corporate commitment to the training and development of retail employees. Therefore, instructors who demonstrate the principles of effective interpersonal behavior are a major element in ensuring the success of this national program.
- Classroom instructors must exhibit exemplary behavior and presentation skills, as well as a professional appearance. Adherence to the official Postal Service uniform policy is essential. Instructors qualifying for a uniform allowance must be in full uniform at all times while training. In addition, since classroom instructors must work in close proximity to trainees, high standards of personal hygiene must be maintained.

After the Training

- Complete and sign all necessary paperwork and documentation which includes:
- PS Form 2548, *Individual Training Record*
- Follow all local guidelines and procedures to promptly submit all required paperwork.
- Assist in updating and maintaining all training materials. Suggestions and recommendations concerning the training materials may be sent in writing to:

Retail Operations
Attention: Retail Training
475 L'Enfant Plaza SW, Room 5621
Washington, DC 20260-5621

Retail Coaches

Before the Training

- Retail coaches will need 4 hours of preparation time before administering On-the-Job training.
- Ensure that all materials are current and available. When handouts and reference materials are needed, the retail coach is responsible for having them ready to use and/or distribute.
- Solicit support from the other retail employees in the office or station. Retail employees and the retail coach may want to coordinate their customer service efforts to provide the trainee with the widest variety of customer transactions possible.
- **The retail coach must be present during initial consignment of the future Associate's accountability.**

During the Training

- Provide the necessary learning experiences that actively engages the future associate through adult learning techniques, such as demonstration, role-playing, presentations, etc.
- Accurately maintain and document all necessary training records as lesson plans are completed.
- Maintain communication with the station manager and district training office regarding the future associate's progress.
- Maintain an upbeat and positive attitude while working with the future associate.

- Retail Coaches must exhibit exemplary behavior and presentation skills, as well as a professional appearance. Adherence to the official Postal Service uniform policy is essential. Retail coaches qualifying for a uniform allowance must be in full uniform at all times while training. In addition, since retail coaches must work in close proximity to trainees, high standards of personal hygiene must be maintained.

After the Training

- The retail coach must be present during final count of future associate's accountability.
- Complete and sign all necessary paperwork and documentation which includes:
 - On-the-Job Training Worksheet
 - PS Form 2432, *Individual Training Progress Report*
 - PS Form 2548, *Individual Training Record*
- Follow all local guidelines and procedures to promptly submit all required paperwork.
- Assist in updating and maintaining all Sales and Services Associate Training materials by using the current directives.

Additional Considerations

Subject Matter Experts and Guest Instructors

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

- Module 20: Security and Sanctity of the Mail
- Module 25: APWU Module (Union Representative must present this module.)

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

Student Guidelines

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

Training Materials and Supplies

A complete listing of training materials and supplies to successfully conduct the sales and services associate training course can be found on the Employee Development web home page.

Sample Posting

JOB ANNOUNCEMENT

AD-HOC SALES & SERVICES ASSOCIATE TRAINING CLASSROOM INSTRUCTOR POSITIONS

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

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

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

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

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

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

Qualifications: Successful completion of the Facilitative Instructor Workshop.