



Retail

Structured On-the-Job Core Processes Training

Workbook

Course #23Q01-06

NSN #7610040009881

December 23, 1999

HUMAN RESOURCES

EMPLOYEE DEVELOPMENT

(This Page Intentionally Left Blank)

Retail

Structured On-the-Job Core Processes Training

Workbook

Course #23Q01-06

NSN #7610040009881

December 23, 1999

United States Postal Service
Retail Workforce Strategies
475 L'Enfant Plaza SW
Washington, D.C. 20260-4215

(This Page Intentionally Left Blank)

Use of Training Materials

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

Copyright 1999 by United States Postal Service, Washington DC 20260-4215

All rights reserved.

No part of this publication may be reproduced in any form or by any means without permission, in writing, from the United States Postal Service, Employee Development.

Certain parts of this publication may contain copyrighted materials from other sources the reproduction of which for this specific training use has been interpreted not to exceed the fair use clause of the copyright regulation (Ref. 371.5 ASM)

(This Page Intentionally Left Blank)

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.

Instructors have a professional obligation to provide a safe, discrimination free and sexual harassment free learning environment.

Class participants are asked to support 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 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; to do what is right for our employees and the communities we serve, thereby ensuring a competitive advantage in the global marketplace.

(This Page Intentionally Left Blank)

U.S. Postal Service Policy on Diversity

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

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

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

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

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

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

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

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

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

(This Page Intentionally Left Blank)

U.S. Postal Service Policy on Sexual Harassment

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

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

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

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

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

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

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

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

Report any possible criminal misconduct to the Postal Inspection Service.

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

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

(This Page Intentionally Left Blank)

PREFACE

The Retail Structured On-the Job Core Processes were designed to provide Retail Coaches with a series of core lesson plans. Structured on-the-job training is used to acquaint employees with their new positions, to acquire knowledge and skills related to changes in work processes, and to implement refresher training.

(This Page Intentionally Left Blank)

Sample Script for Conducting Structured On-the-Job Training

1. Introduction. Hello, my name is _____. I am your RETAIL COACH.
2. The task we are going to work on today is [read from Training Worksheet]. By the end of this session, you will be able to [read from Terminal Objective]. The prerequisite for performing this task is that you have already taken the Sales and Service Associate Training Program. In addition, I'd like to review GIST with you before we begin. [Briefly, review Greet, Inquire, Suggest and Thank.]
3. For training purposes, review each step of the Training Worksheet by showing and telling the things listed under "Retail Coach will" and having the future associate repeat the demonstration by doing what is listed under "Future Associate will." Do this for all steps listed (up to 10 for each process).
4. For certification, either with the retail coach acting as customer or with an actual customer, have the future associate demonstrate the tasks listed. Check off the steps that were completed correctly by the future associate. If the future associate misses a step and a customer is present, remind him/her of the step and have him/her complete the task starting at the error. After the customer leaves, have the future associate go through the entire task and check off the steps that were completed correctly. If the future associate misses a step and a role-play is being used, have the future associate complete the entire task again. If the future associate misses the step twice, place an X next to the step.
5. At the end of the form, indicate the number of steps completed correctly by counting the number of check marks and placing the number in the space for completed steps. Indicate the number of steps either completed incorrectly or not completed by counting the number of Xs and placing the number in the space for steps not completed.
6. Indicate the number of steps that were completed successfully on the Structured Training Certification Worksheet and the PS Form 2528.
7. Make it a point during day one to show the future associate all necessary emergency exits, fire extinguisher placements and emergency numbers.
8. Make it a point during day one to show the future associate the break area and personal convenience areas.
9. Take time during the first 32 core processes to cordially introduce the future associate to the entire retail team which includes the manager of customer services, supervisor of customer services and the other sales and services associates, window clerks and sales associates.

Structured On-the-Job Training Worksheet (Core Lessons)

Sales and Services Associate: _____

Retail Coach: _____

Unit Trained: _____

Date Completed: _____

Unit Assigned: _____

Mandatory Structured On-the-Job Training Lessons	Steps in Lesson (a)	<u>Steps Completed Successfully</u> (b)	Percentage of Steps Completed Successfully (c)	Retail Coach Initials	Future Associat e Initials
1. Selling and Accepting Domestic Express Mail	10				
2. Selling and Accepting Domestic Priority Mail	6				
3. Selling and Accepting Certified Mail	7				
4. Selling and Accepting Delivery Confirmation	5				
5. Selling and Accepting Domestic Numbered Insured Mail	9				
6. Selling and Accepting Domestic Unnumbered Insured Mail	8				
7. Selling and Accepting Domestic Registered Mail	10				
8. Selling and Accepting Domestic C.O.D. Mail	8				
9. Selling and Accepting Domestic Return Receipt for Merchandise	8				
10. Selling and Accepting Domestic Certificate of Mailing	9				
11. Selling and Accepting Domestic Return Receipt AFTER Mailing (Not a Duplicate)	6				
12. Accepting and Identifying Domestic Machineable Articles	7				
13. Accepting and Identifying Domestic Non-Machineable Articles	7				
14. Selling Domestic Postal Money Orders	10				
15. Selling Stamps and Postal Retail/Package Products	6				
16. Selling and Accepting Military Mail (APO or FPO)	7				
17. Completing Customs Forms	7				
18. Selling and Accepting International Insured Mail	10				
19. Selling and Accepting International Registered Mail	10				
20. Selling International Mail Return Receipt	9				
21. Accepting and Processing of Bank Cards	7				
22. Cashing Domestic Postal Money Orders	10				
23. Securing and Accounting for Domestic Money Orders	7				
24. Renting a Post Office Box	10				
25. Delivering Registered Mail	9				
26. Delivering Express Mail	9				
27. Delivering Certified Mail	10				
28. Delivering Postage Due or Business Reply Mail	7				
29. Delivering Domestic Insured Mail	10				
30. Delivering Collect-On-Delivery (COD) Articles	10				
31. Dispatching Registered Mail to the Processing and Distribution Center	7				
32. Working With the Express Mail Network Directory	9				

Total Number of Tasks with 80% or More Steps Completed Correctly: _____

STRUCTURED ON-THE-JOB PROCESSES

TABLE OF CONTENTS

1. Selling and Accepting Domestic Express Mail
2. Selling and Accepting Domestic Priority Mail
3. Selling and Accepting Certified Mail
4. Selling and Accepting Delivery Confirmation
5. Selling and Accepting Domestic Numbered Insured Mail
6. Selling and Accepting Domestic Unnumbered Insured Mail
7. Selling and Accepting Domestic Registered Mail
8. Selling and Accepting Domestic C.O.D. Mail
9. Selling and Accepting Domestic Return Receipt for Merchandise
10. Selling and Accepting Domestic Certificate of Mailing
11. Selling and Accepting Domestic Return Receipt AFTER Mailing (Not a Duplicate)
12. Accepting and Identifying Domestic Machineable Articles
13. Accepting and Identifying Domestic Non-Machineable Articles
14. Selling Domestic Postal Money Orders
15. Selling Stamps and Postal Retail/Package Products
16. Selling and Accepting Military Mail (APO or FPO)
17. Completing Customs Forms
18. Selling and Accepting International Insured Mail
19. Selling and Accepting International Registered Mail
20. Selling International Mail Return Receipt
21. Accepting and Processing of Bank Cards
22. Cashing Domestic Postal Money Orders
23. Securing and Accounting for Domestic Money Orders
24. Renting a Post Office Box
25. Delivering Registered Mail
26. Delivering Express Mail
27. Delivering Certified Mail
28. Delivering Postage Due or Business Reply Mail
29. Delivering Domestic Insured Mail
30. Delivering Collect-On-Delivery (COD) Articles
31. Dispatching Registered Mail to the Processing and Distribution Center
32. Working With the Express Mail Network Directory

Training Worksheet

Lesson #01

Task:
Selling and Accepting Domestic Express Mail

Terminal Objective: review with future Associate
How to Sell and Accept Domestic Express Mail

Prerequisites:
_____ Sales and Services Associate Training Course
_____ Review GIST
_____ Process #32

Supplies and Equipment Needed for This Training Session:

_____ Customer (role-play) and samples for training	
_____ Express Mail Labels	_____ Tag 44
_____ Express Network	_____ All necessary forms
_____ IRT/POS ONE System	_____ Express Mail Samples
_____ Scale/Rate fold	_____ Pen/pencil

Note to all RCs teaching this session:

Training steps that are specific to clarifying questions to be asked of customer must include pertinent information on any or all of the following:

- **HAZMAT**
 - **Aviation Security**
-

Training Worksheet

Task: Selling and Accepting Domestic Express Mail

_____ 1. RC will

Demonstrate professional greeting technique (**GIST**).

Future Associate will
Repeat demonstration.

_____ 2. RC will

Demonstrate how to ask clarifying questions to determine customer needs (**GIST**).

Future Associate will
Repeat demonstration.

_____ 3. RC will

Explain proper PS Forms 11a or B, 3811 (if applicable) and how to complete, assisting customer if necessary.

Future Associate will
State how to complete forms and assist customer.

_____ 4. RC will

Explain express insurance and waiver of signature option and endorsements.

Future Associate will
State express insurance and waiver of delivery option.

_____ 5. RC will

Explain how to use retail equipment to determine delivery network and fees.

Future Associate will
Repeat demonstration.

_____ 6. RC will

Explain scanning label and demonstrate affixing postage.

Future Associate will
Repeat demonstration.

_____ 7. RC will

Explain value sell technique (**GIST**).

Future Associate will
Demonstrate value sell.

Training Worksheet

Task: Selling and Accepting Domestic Express Mail

_____ 8. RC will

Explain customer payment options and process payment (**GIST**).

Future Associate will
State customer payment options and process payment.

_____ 9. RC will

Explain closing professionally (**GIST**).

Future Associate will
Demonstrate closing professionally.

_____ 10. RC will

Explain/demonstrate where to place article for dispatch.

Future Associate will
Repeat demonstration.

How tested:

_____ Role-play

_____ Customer

Date: _____

Training Worksheet

Lesson #02

Task Name:
Selling and Accepting Domestic Priority Mail

Terminal Objective: review with future Associate
How to Sell and Accept Domestic Priority Mail

Prerequisites:

_____ Sales and Services Associate Training Course
_____ Review **GIST**
_____ Aviation Security Training
_____ HAZMAT Training
_____ Knowledge of the *Domestic Mail Manual*
_____ Knowledge of *Postal Bulletins*

Supplies and Equipment Needed for This Training Session:

_____ Customer (role-play) _____ IRT/POS ONE System
_____ Priority Mail Supplies _____ Tag 44
_____ Postage _____ Pen/pencil

Note to all RCs teaching this session:

Training steps that are specific to clarifying questions to be asked of customer must include pertinent information on any or all of the following:

- **HAZMAT**
- **Aviation Security**

Training Worksheet

Task: Selling and Accepting Domestic Priority Mail.

_____ 1. RC will

Demonstrate professional greeting technique (**GIST**).

Future Associate will
Repeat demonstration.

_____ 2. RC will

Demonstrate how to ask clarifying questions to determine customers needs (**GIST**).

Future Associate will
Repeat demonstration.

_____ 3. RC will

Demonstrate processing priority package on IRT/POS ONE, print and affix PVI label.

Future Associate will
Repeat demonstration.

_____ 4. RC will

Explain value sell technique (**GIST**).

Future Associate will
Demonstrate value sell.

_____ 5. RC will

Explain customer payment options and process payment (**GIST**).

Future Associate will
State customer payment options and process payment.

_____ 6. RC will

Explain closing professionally (**GIST**). Include letting customer know about additional supplies.

Future Associate will
Demonstrate professional closing.

_____ 7. RC will

Future Associate will

Training Worksheet

Task: Selling and Accepting Domestic Priority Mail.

_____ 8. RC will

Future Associate will

_____ 9. RC will

Future Associate will

_____ 10. RC will

Future Associate will

How tested:

_____ Role-play

_____ Customer

Date: _____

Training Worksheet

Lesson #03

Task:

Selling and Accepting Certified Mail

Terminal Objective: review with future Associate

How to Sell and Accept Certified Mail

Prerequisites:

_____ Sales and Services Associate Training Course

_____ Knowledge of *Domestic Mail Manual*

_____ Knowledge of *Postal Bulletin*

_____ Review **GIST**

Supplies and Equipment Needed for This Training Session:

_____ IRT/POS ONE

_____ Customer (role-play)

_____ Rate chart, scale

_____ Return receipt stamp

_____ PS Forms

_____ Pen/pencil

_____ Round date stamp

_____ Postage

Training Worksheet

Task: Selling and Accepting Certified Mail

_____ 1. RC will

Demonstrate professional greeting technique (**GIST**).

Future Associate will
Repeat demonstration.

_____ 2. RC will

Demonstrate how to ask clarifying questions to determine customer needs (**GIST**).

Future Associate will
Repeat demonstration.

_____ 3. RC will

Demonstrate how to complete PS Forms 3800 and 3811 (if requested).

Future Associate will
Repeat demonstration.

_____ 4. RC will

Demonstrate review of customer PS Forms 3800 and 3811 (if requested) to verify all blocks are complete.

Future Associate will
Repeat demonstration.

_____ 5. RC will

Demonstrate how to prepare article for mailing, including, round date of PS Form 3800 and printing PVI label.

Future Associate will
Repeat demonstration.

_____ 6. RC will

Explain value sell techniques (**GIST**).

Future Associate will
Demonstrate value sell.

_____ 7. RC will

Explain customer payment options and process payment (**GIST**).

Future Associate will
State customer payment options and process payment.

Training Worksheet

Task: Selling and Accepting Certified Mail

_____ 8. RC will

Explain closing professionally (**GIST**).

Future Associate will
Demonstrate professional closing.

_____ 9. RC will

Future Associate will

_____ 10. RC will

Future Associate will

How tested: _____ Role-play _____ Customer

Date: _____

Training Worksheet

Lesson #04

Task:

Selling and Accepting Delivery Confirmation

Terminal Objective: review with future Associate

How to Sell and Accept Delivery Confirmation at the Retail Service Counter

Prerequisites:

_____ Sales and Services Associate Training

_____ Review **GIST**

_____ Aviation Security

_____ HAZMAT Training

Supplies and Equipment Needed for This Training Session:

_____ Retail Equipment

_____ Round date stamp

_____ TRANS 380

_____ Package (training)

_____ PS Forms

_____ Train Scan Sheet

_____ Customer (role-play)

_____ Pen/pencil

_____ *Domestic Mail Manual*

Note to all RCs teaching this session:

Training steps that are specific to clarifying questions to be asked of customer must include pertinent information on any or all of the following:

- **HAZMAT**
 - **Aviation Security**
-

Training Worksheet

Task: Selling and Accepting Delivery Confirmation

_____ 1. RC will

Explain/demonstrate professional greeting technique (**GIST**).

Future Associate will
Repeat demonstration.

_____ 2. RC will

Explain/demonstrate how to ask clarifying questions to determine customer needs. This includes educating customer on service and additional services that can be provided. (Priority, Standard B, etc.) (**GIST**)

Future Associate will
Repeat demonstration.

_____ 3. RC will

Explain/demonstrate how to complete PS Form 152 (customer completes).

Future Associate will
Repeat demonstration.

_____ 4. RC will

Explain/demonstrate how to use equipment to process service (this includes proper placement of label and round date).

Future Associate will
Repeat demonstration.

_____ 5. RC will

Explain/demonstrate value sell technique (**GIST**).

Future Associate will
Demonstrate value sell.

_____ 6. RC will

Explain/demonstrate customer payment options and process payment (**GIST**).

Future Associate will
Repeat demonstration.

_____ 7. RC will

Explain/demonstrate closing professionally (**GIST**).

Future Associate will
Demonstrate professional closing.

Training Worksheet

Task: Selling and Accepting Delivery Confirmation

_____ 8. RC will

Future Associate will

_____ 9. RC will

Future Associate will

_____ 10. RC will

Future Associate will

How tested:

_____ Role-play

_____ Customer

Date: _____

Training Worksheet

Lesson #05

Task:

Selling and Accepting Domestic Numbered Insured Mail

Terminal Objective: review with future Associate

How to Sell and Accept Domestic Numbered Insured Mail

Prerequisites:

_____ Sales and Services Associate Training Course

_____ Review **GIST**

_____ Aviation Security Training

_____ HAZMAT Training

Supplies and Equipment Needed for This Training Session:

_____ PS Forms

_____ Customer (role-play)

_____ IRT/POS ONE System

_____ Tag 44

_____ Round date stamp

_____ Pen/pencil

Note to all RCs teaching this session:

Training steps that are specific to clarifying questions to be asked of customer must include pertinent information on any or all of the following:

- **HAZMAT**
 - **Aviation Security**
-

Training Worksheet

Task: Selling and Accepting Domestic Numbered Insured Mail

_____ 1. RC will

Demonstrate professional greeting technique (**GIST**).

Future Associate will
Repeat demonstration.

_____ 2. RC will

Demonstrate how to ask clarifying questions to determine customer needs (**GIST**).

Future Associate will
Repeat demonstration.

_____ 3. RC will

Explain checking item for proper packaging and complete addressing (item perishable, fragile, or hazardous?).

Future Associate will
Check package and address blocks.

_____ 4. RC will

Explain how to calculate postage and fees on equipment, complete PS Form 3813P and 3811 (if requested), round date and attach.

Future Associate will
Repeat demonstration.

_____ 5. RC will

Explain how to detach and endorse PS Forms.

Future Associate will
Repeat demonstration.

_____ 6. RC will

Explain value sell technique (**GIST**).

Future Associate will
Demonstrate value sell.

_____ 7. RC will

Explain customer payment options and process payment (**GIST**).

Future Associate will
State customer payment options and process payment.

Training Worksheet

Task: Selling and Accepting Domestic Numbered Insured Mail

_____ 8. RC will

Explain closing professionally (**GIST**).

Future Associate will
Demonstrate professional closing.

_____ 9. RC will

Future Associate will

_____ 10. RC will

Future Associate will

How tested: _____ Role-play _____ Customer

Date: _____

Training Worksheet

Lesson #06

Task:

Selling and Accepting Domestic Unnumbered Insured Mail

Terminal Objective: review with future Associate

How to Sell and Accept Domestic Unnumbered Insured Mail

Prerequisites:

_____ Sales and Services Associate Training Course

_____ Review **GIST**

_____ Aviation Security Training

_____ HAZMAT Training

Supplies and Equipment Needed for This Training Session:

_____ IRT/POS, rate fold and scale/zone chart

_____ PS Form 3813

_____ Round date stamp

_____ Customer (role-play)

_____ Tag 44

_____ Elliptical Stamp

_____ Pen/pencil

Note to all RCs teaching this session:

Training steps that are specific to clarifying questions to be asked of customer must include pertinent information on any or all of the following:

- **HAZMAT**
 - **Aviation Security**
-

Training Worksheet

Task: Selling and Accepting Domestic Unnumbered Insured Mail

_____ 1. RC will

Demonstrate professional greeting technique (**GIST**).

Future Associate will
Repeat demonstration.

_____ 2. RC will

Demonstrate how to ask clarifying questions to determine customer needs (**GIST**).

Future Associate will
Review demonstration.

_____ 3. RC will

Explain reviewing packaging of item and proper addressing and asking customer if the item contains perishable, fragile or hazardous material.

Future Associate will
Review item for proper packaging and complete addressing and asking customer if the item contains perishable, fragile or hazardous material.

_____ 4. RC will

Explain how to process on equipment and completion of forms, including endorsements.

Future Associate will
State and demonstrate.

_____ 5. RC will

Explain value sell (**GIST**).

Future Associate will
Demonstrate value sell.

_____ 6. RC will

Explain printing PVI label and affixing postage.

Future Associate will
Print PVI and affix postage.

_____ 7. RC will

Explain customer payment options and process payment (**GIST**).

Future Associate will
State customer payment options and process payment.

Training Worksheet

Task: Selling and Accepting Domestic Unnumbered Insured Mail

_____ 8. RC will

Explain closing professionally (**GIST**).

Future Associate will
Demonstrate professional closing.

_____ 9. RC will

Future Associate will

_____ 10. RC will

Future Associate will

How tested:

_____ Role-play

_____ Customer

Date: _____

Training Worksheet

Lesson #07

Task:
Selling and Accepting Domestic Registered Mail

Terminal Objective: review with future Associate
How to Sell and Accept Domestic Registered Mail

Prerequisites:

- _____ Sales and Services Associate Training Course
 - _____ Knowledge of *Domestic Mail Manual*
 - _____ Knowledge of *Postal Bulletin*
 - _____ Review **GIST**
 - _____ Aviation Security Training
 - _____ HAZMAT Training
 - _____ DM 901 Registered Manual
 - _____ Review Training Worksheet #45, "Exchanging of Registered Mail between Employees"
-

Supplies and Equipment Needed for This Training Session:

- | | |
|---|----------------------------|
| _____ PS Form 3806 | _____ IRT/POS ONE System |
| _____ Label 200 | _____ Tag 44 |
| _____ <i>Domestic Mail Manual and Postal Bulletin</i> | |
| _____ Scale/rate fold/zone chart | _____ Registered Mail Tape |
| _____ Postage/PVI | _____ Samples for training |
| _____ Round date stamp | _____ Pen/pencil |
| _____ Customer (role-play) | |
-

Note to all RCs teaching this session:

Training steps that are specific to clarifying questions to be asked of customer must include pertinent information on any or all of the following:

- **HAZMAT**
 - **Aviation Security**
-

Training Worksheet

Task: Selling and Accepting Domestic Registered Mail

_____ 1. RC will

Demonstrate professional greeting techniques (**GIST**).

Future Associate will
Repeat demonstration.

_____ 2. RC will

Demonstrate how to ask clarifying questions to determine customer needs (**GIST**). *Reminder: review machineable and non-machineable standards.*

Future Associate will
Repeat demonstration.

_____ 3. RC will

Demonstrate what procedures to follow to secure item (i.e., proper packaging, shake test, and questions regarding item being fragile, perishable, or hazardous).

Future Associate will
Repeat demonstration.

_____ 4. RC will

Explain form completion to customer.

Future Associate will
Repeat demonstration.

_____ 5. RC will

Explain/demonstrate using retail equipment for postage and fees.

Future Associate will
Repeat demonstration.

_____ 6. RC will

Demonstrate package requirements, including endorsements and postage.

Future Associate will
Repeat demonstration.

_____ 7. RC will

Explain value sell technique (**GIST**).

Future Associate will
Demonstrate value sell.

Training Worksheet

Task: Selling and Accepting Domestic Registered Mail

_____ 8. RC will

Explain customer payment options and process payment (**GIST**).

Future Associate will
State customer payment options and process payment.

_____ 9. RC will

Explain closing professionally (**GIST**).

Future Associate will
Demonstrate professional closing.

_____ 10. RC will

Explain how and where to secure registered article.

Future Associate will
Repeat demonstration.

How tested: _____ Role-play _____ Customer

Date: _____

Training Worksheet

Lesson #08

Task:
Selling and Accepting Domestic COD Mail

Terminal Objective: review with future Associate
How to Sell and Accept Domestic COD Mail

Prerequisites:
_____ Sales and Services Retail Training Program
_____ Review **GIST**
_____ Aviation Security Training
_____ HAZMAT Training

Supplies and Equipment Needed for This Training Session:

_____ IRT/POS ONE System	_____ Customer (role-play)
_____ PVI/Postage	_____ Elliptical stamp
_____ Scale/rate fold/zone chart	_____ Tag 44
_____ PS Form 3816	_____ Pen/pencil
_____ Round date stamp	
_____ Role-play samples	

Note to all RCs teaching this session:

Training steps that are specific to clarifying questions to be asked of customer must include pertinent information on any or all of the following:

- **HAZMAT**
 - **Aviation Security**
-

Training Worksheet

Task: Selling and Accepting Domestic COD Mail

_____ 1. RC will

Demonstrate professional greeting technique (**GIST**).

Future Associate will
Repeat demonstration.

_____ 2. RC will

Demonstrate how to ask clarifying questions to determine customer needs (**GIST**).

Future Associate will
Repeat demonstration.

_____ 3. RC will

Explain what additional services are available with COD service (**GIST**).

Future Associate will
State what services are available with COD.

_____ 4. RC will

Explain/demonstrate how to complete PS Form 3816. Note: if express, then the express number becomes the COD control number.

Future Associate will
Repeat demonstration.

_____ 5. RC will

Explain how to calculate fees and affix postage.

Future Associate will
Calculate fees and affix postage.

_____ 6. RC will

Explain value sell technique (**GIST**).

Future Associate will
Demonstrate value sell.

_____ 7. RC will

Explain customer payment options and process payment (**GIST**).

Future Associate will
State customer payment options and process payment.

Training Worksheet

Task: Selling and Accepting Domestic COD Mail

_____ 8. RC will

Explain closing professionally (**GIST**).

Future Associate will
Demonstrate professional closing.

_____ 9. RC will

Future Associate will

_____ 10. RC will

Future Associate will

How tested: _____ Role-play _____ Customer

Date: _____

Training Worksheet

Lesson #09

Task:

Selling and Accepting Domestic Return Receipt for Merchandise

Terminal Objective: review with future Associate

How to Sell and Accept a Return Receipt for Merchandise

Prerequisites:

_____ Sales and Services Retail Training Program

_____ Review **GIST**

_____ Aviation Security Training

_____ HAZMAT Training

Supplies and Equipment Needed for This Training Session:

_____ IRT/POS System

_____ Scale, rate chart

_____ Round date stamp

_____ PS Forms

_____ Appropriate stampers

_____ Tag 44

_____ Postage

_____ Pen/pencil

_____ Customer (role-play) and samples for training

_____ Rate Chart

Training Worksheet

Task: Selling and Accepting Return Receipt for Merchandise

_____ 1. RC will

Demonstrate professional greeting technique (**GIST**).

Future Associate will
Repeat demonstration.

_____ 2. RC will

Demonstrate how to ask clarifying questions to determine customer needs. Determine class of mails (**GIST**).

Future Associate will
Repeat demonstration.

_____ 3. RC will

Explain how to instruct customer on completing PS Form 3804 and 3811 (if applicable). Explain waiver of signature option (**GIST**).

Future Associate will
Repeat demonstration.

_____ 4. RC will

Demonstrate how to complete USPS part of PS Form 3804 and 3811. Apply PVI label and round date receipt. Complete form processing using retail equipment.

Future Associate will
Repeat demonstration.

_____ 5. RC will

Demonstrate attaching PS Forms.

Future Associate will
Repeat demonstration.

_____ 6. RC will

Explain value sell technique (**GIST**).

Future Associate will
Demonstrate value sell.

_____ 7. RC will

Explain customer payment options and process payment (**GIST**).

Future Associate will
State customer payment options and process payment.

Training Worksheet

Task: Selling and Accepting Return Receipt for Merchandise

_____ 8. RC will

Explain closing professionally (**GIST**).

Future Associate will
Demonstrate professional closing.

_____ 9. RC will

Future Associate will

_____ 10. RC will

Future Associate will

How tested: _____ Role-play _____ Customer

Date: _____

Training Worksheet

Lesson #10

Task:
Selling and Accepting Domestic Certificate of Mailing

Terminal Objective: review with future Associate
How to Sell and Accept Domestic Certificate of Mailing.

Prerequisites:
_____ Sales and Services Retail Training Program
_____ Review **GIST**
_____ Aviation Security Training
_____ HAZMAT Training

NOTE: This process begins after a product or service has been sold to a customer.

Supplies and Equipment Needed for This Training Session:

_____ Customer (role-play)	_____ <i>Domestic Mail Manual</i>
_____ PVI/meter/postage	_____ <i>International Mail Manual</i>
_____ PS Form 3817	_____ Round date stamp
_____ IRT/POS ONE System	_____ Pen/pencil
_____ Tag 44	

Training Worksheet

Task: Selling and Accepting Domestic Certificate of Mailing

_____ 1. RC will

Demonstrate professional greeting technique (**GIST**).

Future Associate will
Repeat demonstration.

_____ 2. RC will

Demonstrate how to ask clarifying questions to determine customer needs (**GIST**).

Future Associate will
Repeat demonstration.

_____ 3. RC will

Demonstrate giving customer PS Form 3817 and assisting, if necessary to complete form (**GIST**).

Future Associate will
Repeat demonstration.

_____ 4. RC will

Explain the importance of verifying the PS Form 3817 to the mailpiece.

Future Associate will
State the importance of verifying PS Form 3817 to mailpiece.

_____ 5. RC will

Demonstrate how to affix postage to PS Form 3817 or to article (if necessary); round date on meter or stamps.

Future Associate will
Repeat demonstration.

_____ 6. RC will

Explain value sell techniques (**GIST**).

Future Associate will
Demonstrate value sell.

_____ 7. RC will

Explain customer payment options and process payment (**GIST**).

Future Associate will
State customer payment options and process payment.

Training Worksheet

Task: Selling and Accepting Domestic Certificate of Mailing

_____ 8. RC will
Demonstrate giving customer receipt, PS Form 3817.

Future Associate will
Repeat demonstration.

_____ 9. RC will
Explain closing professionally (**GIST**).

Future Associate will
Demonstrate professional closing.

_____ 10. RC will

Future Associate will

How tested: _____ Role-play _____ Customer

Date: _____

Training Worksheet

Lesson #11

Task:

Selling and Accepting Domestic Return Receipt AFTER Mailing (Not a Duplicate)

Terminal Objective: review with future Associate

How to Sell and Accept Domestic Return Receipt Service AFTER Mailing

Prerequisites:

_____ Sales and Services Associate Training Course

_____ Review **GIST**

_____ Aviation Security Training

_____ HAZMAT Training

Supplies and Equipment Needed for This Training Session:

_____ PS Forms 3811A and special mailing receipt, and other forms

_____ IRT/POS ONE System

_____ Pen/pencil

_____ Postage

_____ Customer (role-play)

_____ Samples for training

Training Worksheet

Task: Selling and Accepting Domestic Return Receipt AFTER Mailing (Not a Duplicate)

_____ 1. RC will

Demonstrate professional greeting technique (**GIST**).

Future Associate will
Repeat demonstration.

_____ 2. RC will

Demonstrate how to ask clarifying questions to determine customer needs. This includes educating customer (**GIST**).

Future Associate will
Repeat demonstration.

_____ 3. RC will

Demonstrate completion of USPS part of PS Form 3811 A and affix postage.

Future Associate will
Repeat demonstration.

_____ 4. RC will

Explain value sell techniques (**GIST**).

Future Associate will
Demonstrate value sell.

_____ 5. RC will

Explain customer payment options and process payment (**GIST**).

Future Associate will
State customer payment options and process payment.

_____ 6. RC will

Explain closing professionally (**GIST**).

Future Associate will
Demonstrate professional closing.

_____ 7. RC will

Future Associate will

Training Worksheet

Task: Selling and Accepting Domestic Return Receipt AFTER Mailing (Not a Duplicate)

_____ 8. RC will

Future Associate will

_____ 9. RC will

Future Associate will

_____ 10. RC will

Future Associate will

How tested:

_____ Role-play

_____ Customer

Date: _____

Training Worksheet

Lesson #12

Task Name:

Accepting and Identifying Domestic Machineable Articles

Terminal Objective: review with future Associate

How to Accept and Identify Domestic Machineable Articles

Prerequisites:

_____ Sales and Services Associate Training Course

_____ Knowledge of *Domestic Mail Manual*

_____ Knowledge of *Postal Bulletin*

_____ Review **GIST**

_____ Aviation Security Training

_____ HAZMAT Training

Supplies and Equipment Needed for This Training Session:

_____ IRT/POS ONE System

_____ Customer (role-play)

_____ Scale/postage

_____ Tag 44

_____ Tape measure

_____ Pen/pencil

_____ Stampers

_____ Machineable chart/template

Note to all RCs teaching this session:

Training steps that are specific to clarifying questions to be asked of customer must include pertinent information on any or all of the following:

- **HAZMAT**
 - **Aviation Security**
-

Training Worksheet

Task: Accepting and Identifying Domestic Machineable Articles

_____ 1. RC will

Demonstrate professional greeting technique (**GIST**).

Future Associate will
Repeat demonstration.

_____ 2. RC will

Explain how to ask clarifying questions to determine customer needs (**GIST**).

Future Associate will
Ask clarifying questions to determine customer needs.

_____ 3. RC will

Demonstrate how to determine if item is mailable; inquire if fragile, perishable, or hazardous.

Future Associate will
Repeat demonstration.

_____ 4. RC will

Demonstrate how to prepare package, i.e., postage, labels, and forms, and include endorsements.

Future Associate will
Repeat demonstration.

_____ 5. RC will

Explain value sell techniques (**GIST**).

Future Associate will
Demonstrate value sell.

_____ 6. RC will

Explain customer payment options and process payment (**GIST**).

Future Associate will
State customer payment options and process payment.

_____ 7. RC will

Explain closing professionally (**GIST**).

Future Associate will
Demonstrate professional closing.

Training Worksheet

Task: Accepting and Identifying Domestic Machineable Articles

_____ 8. RC will

Future Associate will

_____ 9. RC will

Future Associate will

_____ 10. RC will

Future Associate will

How tested:

_____ Role-play

_____ Customer

Date: _____

Training Worksheet

Lesson #13

Task:

Accepting and Identifying Domestic Non-Machineable Articles

Terminal Objective: review with future Associate

How to Accept and Identify Domestic Non-Machineable Articles.

Prerequisites:

_____ Sales and Services Associate Training Course

_____ Review **GIST**

_____ Aviation Security Training

_____ HAZMAT Training

_____ Knowledge of the *Domestic Mail Manual*

_____ Knowledge of *Postal Bulletin*

Supplies and Equipment Needed for This Training Session:

_____ *Domestic Mail Manual*

_____ IRT/POS ONE

_____ Fan Scale (For Manual Offices)

_____ Fan Scale

_____ *Postal Bulletin*

_____ Non-Machineable Chart

_____ X-stamper set

_____ Template

_____ Tape Measure

_____ Tag 44

_____ Pen/pencil

_____ Customer (role-play)

Note to all RCs teaching this session:

Training steps that are specific to clarifying questions to be asked of customer must include pertinent information on any or all of the following:

- **HAZMAT**
 - **Aviation Security**
-

Training Worksheet

Task: Accepting and Identifying Non-Machineable Articles

_____ 1. RC will

Demonstrate professional greeting technique (**GIST**).

Future Associate will
Repeat demonstration.

_____ 2. RC will

Demonstrate how to ask clarifying questions to determine customer needs (**GIST**). *Reminder: ask if article is fragile, perishable, or hazardous.*

Future Associate will
Repeat demonstration.

_____ 3. RC will

Demonstrate how to determine if the article is Non-Machineable, based on size or weight.

Future Associate will
Repeat demonstration.

_____ 4. RC will

Demonstrate how to prepare article for mailing.

Future Associate will
Repeat demonstration.

_____ 5. RC will

Explain value sell technique (**GIST**).

Future Associate will
Demonstrate value sell.

_____ 6. RC will

Explain customer payment options and process payment (**GIST**).

Future Associate will
State customer payment options and process payment.

_____ 7. RC will

Explain closing professionally (**GIST**).

Future Associate will
Demonstrate professional closing.

Training Worksheet

Task: Accepting and Identifying Non-Machineable Articles

_____ 8. RC will

Future Associate will

_____ 9. RC will

Future Associate will

_____ 10. RC will

Future Associate will

How tested: _____ Role-play _____ Customer

Date: _____

Training Worksheet

Lesson #14

Task:
Selling Domestic Postal Money Orders

Terminal Objective: review with future Associate
How to Sell a Domestic Postal Money Order

Prerequisites:
_____ Sales and Services Associate Training Course
_____ Review **GIST**

Supplies and Equipment Needed for This Training Session:

_____ Money Order Printer	_____ Pen/pencil
_____ Money Order (training)	
_____ IRT/POS ONE System	
_____ Manual tracking form	
_____ Customer (role-play)	

Training Worksheet

Task: Selling Domestic Postal Money Orders

_____ 1. RC will

Demonstrate professional greeting technique (**GIST**).

Future Associate will
Repeat demonstration.

_____ 2. RC will

Demonstrate how to ask clarifying questions to determine customer needs (**GIST**).

Future Associate will
Repeat demonstration.

_____ 3. RC will

Demonstrate how to review procedures of identifying repeat customers that purchase large amounts of money orders on a regular basis, anti money order laundering system (bank security).

Future Associate will
Repeat demonstration.

_____ 4. RC will

Explain checking money order printer for correct date and then process voucher on local equipment (imprint).

Future Associate will
Review date on printer and process voucher on equipment.

_____ 5. RC will

Demonstrate how to review information on money order including verifying number against the POS ONE and dollar amount. Review voiding money orders and correcting amounts on retail equipment.

Future Associate will
State reviewing money order.

_____ 6. RC will

Explain value sell techniques (**GIST**).

Future Associate will
Explain value sell.

_____ 7. RC will

Demonstrate removing postal receipt from voucher, if applicable. State customer payment options and process payment (**GIST**), posting on checklist or in retail equipment.

Future Associate will
Repeat demonstration.

Training Worksheet

Task: Selling Domestic Postal Money Orders

_____ 8. RC will

Explain coaching customer on completing blocks on money orders and maintaining receipts for their records. Complete transaction.

Future Associate will
Coach customer and demonstrate completing transaction.

_____ 9. RC will

Explain closing professionally (**GIST**).

Future Associate will
Demonstrate professional closing.

_____ 10. RC will

Explain procedure for retaining money order vouchers and posting on checklist.

Future Associate will
State and demonstrate.

How tested:

_____ Role-play

_____ Customer

Date: _____

Training Worksheet

Lesson #15

Task:
Selling Stamps and Postal Retail/Package Products

Terminal Objective: review with future Associate
How to Sell Stamps and Postal Retail/Package Products

Prerequisites:
_____ Sales and Services Associate Training Course
_____ Review **GIST**

Supplies and Equipment Needed for This Training Session:
_____ IRT/POS ONE System
_____ Stamp Products or Scan Sheet
_____ Customer (role-play)
_____ Pen/pencil

NOTE to all RCs teaching this session:
Training steps that are specific to clarifying questions to be asked of customer must include pertinent information on any or all of the following:

- **HAZMAT**
- **Aviation Security**

Training Worksheet

Task: Selling Stamps and Postal Retail/Package Products

_____ 1. RC will

Explain/demonstrate professional customer greeting (**GIST**).

Future Associate will
Repeat demonstration.

_____ 2. RC will

Explain different ways to sell loose stamps, books, coils, and packaging products.

Future Associate will
Repeat demonstration.

_____ 3. RC will

Explain/demonstrate how to ask clarifying questions to determine customer needs (**GIST**).

Future Associate will
Repeat demonstration.

_____ 4. RC will

Explain value sell.

Future Associate
Explain value sell.

_____ 5. RC will

Explain/demonstrate customer payment options and process payment (**GIST**).

Future Associate will
State customer payment options and process payment.

_____ 6. RC will

Explain closing professionally (**GIST**).

Future Associate will
Demonstrate professional closing.

_____ 7. RC will

Future Associate will

Training Worksheet

Task: Selling Stamps and Postal Retail/Package Products

_____ 8. RC will

Future Associate will

_____ 9. RC will

Future Associate will

_____ 10. RC will

Future Associate will

How tested:

_____ Role-play

_____ Customer

Date: _____

Training Worksheet

Lesson #16

Task:

Selling and Accepting Military Mail (APO or FPO)

Terminal Objective: review with future Associate

How to Sell and Accept Military Mail to an APO or FPO

Prerequisites:

_____ Sales and Services Associate Training Course

_____ Review **GIST**

_____ Aviation Security Training

_____ HAZMAT Training

Supplies and Equipment Needed for This Training Session:

_____ *Domestic Mail Manual*

_____ Knowledge of *Postal Bulletin*

_____ Customs forms

_____ Round date stamp

_____ IRT/POS ONE System

_____ Fan Scale (For Manual Offices)

_____ Mail Samples

_____ PAL/SAM stamps

_____ Customer (role-play)

_____ Pen/pencil

Note to all RCs teaching this session:

Training steps that are specific to clarifying questions to be asked of customer must include pertinent information on any or all of the following:

- **HAZMAT**
 - **Aviation Security**
-

Training Worksheet

Task: Selling and Accepting Military Mail (APO or FPO)

_____ 1. RC will

Demonstrate a professional greeting technique (**GIST**).

Future Associate will
Repeat demonstration.

_____ 2. RC will

Demonstrate how to determine article can be mailed via military. Use *Postal Bulletin* to review restrictions. Not: review for machineable or non-machineable standards (**GIST**).

Future Associate will
Repeat demonstration.

_____ 3. RC will

Demonstrate how to complete forms. Cover aviation security questions.

Future Associate will
Repeat demonstration.

_____ 4. RC will

Demonstrate weighing article and attaching postage. Use retail equipment.

Future Associate will
Repeat demonstration.

_____ 5. RC will

Explain value sell technique (**GIST**).

Future Associate will
Demonstrate value sell.

_____ 6. RC will

Explain customer payment options and process payment (**GIST**).

Future Associate will
State customer payment options and process payment.

_____ 7. RC will

Explain closing professionally (**GIST**).

Future Associate will
Demonstrate professional closing.

Training Worksheet

Task: Selling and Accepting Military Mail (APO or FPO)

_____ 8. RC will

Future Associate will

_____ 9. RC will

Future Associate will

_____ 10. RC will

Future Associate will

How tested:

_____ Role-play

_____ Customer

Date: _____

Training Worksheet

Lesson #17

Task:
Completing Customs Forms

Terminal Objective: review with future Associate
How to Complete Customs Forms

Prerequisites:

- _____ Sales and Services Associate Training Course
- _____ Review **GIST**
- _____ Aviation Security Training
- _____ HAZMAT Training
- _____ Process #36 (Selling and Accepting Express Mail Military Service)

Supplies and Equipment Needed for This Training Session:

- | | |
|--------------------------------------|--|
| _____ CF 2976, 2976A, 2976E | _____ Rate fold chart |
| _____ PS Form 3813P | _____ <i>International Mail Manual</i> |
| _____ IRT/POS ONE System | _____ Round date stamp |
| _____ <i>Postal Bulletin</i> updates | _____ Pen/pencil |
| _____ Customer (role-play) and | |
| _____ Mailpiece Samples | |

Note to all RCs teaching this session:

Training steps that are specific to clarifying questions to be asked of customer must include pertinent information on any or all of the following:

- **HAZMAT**
 - **Aviation Security**
-

Training Worksheet

Task: Completing Customs Forms

_____ 1. RC will

Explain how to determine appropriate customs forms. Use IMM for reference **(GIST)**.

Future Associate will
Identify appropriate customs form using the *International Mail Manual*.

_____ 2. RC will

Demonstrate how to assist customer in completing forms and explain the purpose **(GIST)**.

Future Associate will
Repeat demonstration.

_____ 3. RC will

Demonstrate how to verify and complete customs forms.

Future Associate will
Repeat demonstration.

_____ 4. RC will

Explain how to prepare article for mailing, i.e., affix forms and postage (round date), retain appropriate copies for FAA and advise customer of retention **(GIST)**.

Future Associate will
Prepare article for mailing.

_____ 5. RC will

Explain value sell technique **(GIST)**.

Future Associate will
Demonstrate value sell.

_____ 6. RC will

Explain customer payment options and process payment **(GIST)**.

Future Associate will
State customer payment options and process payment.

_____ 7. RC will

Explain closing professionally **(GIST)**.

Future Associate will
Demonstrate professional closing.

Training Worksheet

Task: Completing Customs Forms

_____ 8. RC will

Future Associate will

_____ 9. RC will

Future Associate will

_____ 10. RC will

Future Associate will

How tested:

_____ Role-play

_____ Customer

Date: _____

Training Worksheet

Lesson #18

Task:
Selling and Accepting International Insured Mail

Terminal Objective: review with future Associate
How to Sell and Accept International Insured Mail

Prerequisites:
_____ Sales and Services Associate Training Course
_____ Review **GIST**
_____ Aviation Security Training
_____ HAZMAT Training

Supplies and Equipment Needed for This Training Session:

_____ <i>International Mail Manual</i>	_____ Round date stamp
_____ Individual Country Listing	_____ Par Avion and Surface
_____ Standard Drawing Rights conversion table	_____ PVI/Postage Stamp
_____ IRT/POS ONE System	_____ Tag 44
_____ Fan Scale (for Manual Offices)	_____ Customer (role-play)
_____ PS Form 2976A	_____ Mailpiece Samples
_____ PS Form 2976E	_____ Pen/pencil
_____ PS Form 3813P	

Note to all RCs teaching this session:

Training steps that are specific to clarifying questions to be asked of customer must include pertinent information on any or all of the following:

- **HAZMAT**
 - **Aviation Security**
-

Training Worksheet

Task: Selling and Accepting International Insured Mail

_____ 1. RC will

Demonstrate professional greeting technique (**GIST**).

Future Associate will
Repeat demonstration.

_____ 2. RC will

Demonstrate how to ask clarifying questions to determine customer needs (**GIST**).

Future Associate will
Repeat demonstration.

_____ 3. RC will

Explain how to check in the IMM for package restrictions and verify contents and packaging with the customer. Will also ask if fragile, liquid, hazardous; verify addressing and insurance availability (**GIST**).

Future Associate will
State restrictions using the IMM and verify contents and packaging. Will also ask if article is fragile, liquid, and hazardous.

_____ 4. RC will

Explain how to assist customer in filling out customs forms PS Forms 2976 A and 3813P and how to verify information on completed forms. Use equipment to determine fees. Also explain endorsements.

Future Associate will
State how to assist customer in preparing customs forms and how to verify completed forms.

_____ 5. RC will

Demonstrate how to complete postal section of forms using the conversion chart.

Future Associate will
Repeat demonstration.

_____ 6. RC will

Explain how to affix all forms, endorsements, and postage to mailpiece.

Future Associate will
State how to attach all forms, endorsements, and postage to mailpiece.

_____ 7. RC will

Demonstrate issuing receipts while explaining the importance of receipt retention (**GIST**).

Future Associate will
Repeat demonstration.

Training Worksheet

Task: Selling and Accepting International Insured Mail

_____ 8. RC will

Explain value sell technique (**GIST**).

Future Associate will
Explain value sell.

_____ 9. RC will

Explain customer payment options and process payment (**GIST**).

Future Associate will
State customer payment options and process payment.

_____ 10. RC will

Explain closing professionally (**GIST**).

Future Associate will
Demonstrate professional closing.

How tested: _____ Role-play _____ Customer

Actual Teaching Time (Min.): _____

Date: _____

Training Worksheet

Lesson #19

Task:
Selling and Accepting International Registered Mail

Terminal Objective: review with future Associate
How to Sell and Accept International Registered Mail

Prerequisites:
_____ Sales and Services Associate Training Course
_____ Review **GIST**
_____ Aviation Security Training
_____ HAZMAT Training

Supplies and Equipment Needed for This Training Session:

_____ <i>International Mail Manual</i>	_____ IRT/POS ONE System
_____ Scale/rate fold	_____ Paper Tape
_____ PS Form 3806	_____ Tag 44
_____ Label 200	_____ DM-901
_____ Label 19A	_____ Pen/pencil
_____ Label 19B	_____ Customer (role-play)
_____ Customer forms	
_____ Round date stamp	

Note to all RCs teaching this session:

Training steps that are specific to clarifying questions to be asked of customer must include pertinent information on any or all of the following:

- **HAZMAT**
 - **Aviation Security**
-

Training Worksheet

Task: Selling and Accepting International Registered Mail

_____1. RC will

Demonstrate professional greeting technique (**GIST**).

Future Associate will
Repeat demonstration.

_____2. RC will

Demonstrate how to ask clarifying questions to determine customer needs (**GIST**).

Future Associate will
Repeat demonstration.

_____3. RC will

Demonstrate how to check ICLs in the IMM for prohibitions, restrictions, observations, and correct customs forms.

Future Associate will
Repeat demonstration.

_____4. RC will

Explain packaging requirements for International Registered Mail and maximum indemnity.

Future Associate will
State proper packaging requirements.

_____5. RC will

Demonstrate completing necessary forms: i.e., customs, PS Form 3806.

Future Associate will
Repeat demonstration.

_____6. RC will

Demonstrate proper placement of Label 200, endorsements, and postmarks (on back of mailpiece and on all seams).

Future Associate will
Repeat demonstration.

_____7. RC will

Use equipment or rate fold to determine fees and attach.

Future Associate will
State how to attach postage and fees.

Training Worksheet

Task: Selling and Accepting International Registered Mail.

_____ 8. RC will

Explain value sell technique (**GIST**).

Future Associate will
Explain value sell.

_____ 9. RC will

Explain customer payment options and process payment (**GIST**).

Future Associate will
State customer payment options and process payment.

_____ 10. RC will

Explain closing professionally (**GIST**), explain where and how to secure International Registered article.

Future Associate will
Demonstrate professional closing and storing of article.

How tested:

_____ Role-play

_____ Customer

Date: _____

Training Worksheet

Lesson #20

Task:
Selling and Accepting International Mail Return Receipt

Terminal Objective: review with future Associate
How to Sell and Accept International Mail Return Receipt

Prerequisites:
_____ Sales and Services Retail Training Program
_____ Review **GIST**
_____ Aviation Security Training
_____ HAZMAT Training

Supplies and Equipment Needed for This Training Session:

_____ <i>International Mail Manual</i>	_____ Custom forms
_____ PS Form 2865	_____ Tag 44
_____ PS Form 8099	_____ <i>Postal Bulletin</i>
_____ Insurance form	_____ Scale
_____ Register label (#'s)	_____ Rate fold
_____ Customer (role-play)	_____ Pen/pencil
_____ IRT/POS ONE System	

Note to all RCs teaching this session:

Training steps that are specific to clarifying questions asked of customer must include pertinent information on any or all of the following:

- **HAZMAT**
 - **Aviation Security**
-

Training Worksheet

Task: Selling and Accepting International Mail Return Receipt

_____ 1. RC will

Demonstrate professional greeting technique (**GIST**).

Future Associate will
Repeat demonstration.

_____ 2. RC will

Demonstrate how to ask clarifying questions to determine customer needs (**GIST**).

Future Associate will
Repeat demonstration.

_____ 3. RC will

Explain to customer the Return Receipt availability. Use *International Mail Manual* and retail equipment to determine postage and fees.

Future Associate will
Repeat demonstration.

_____ 4. RC will

Explain to customer how to complete PS Form 2865.

Future Associate will
State and demonstrate how customer will fill out PS Form 2865.

_____ 5. RC will

Explain/demonstrate how to complete corresponding forms. Prepare article for mailing.

Future Associate will
Repeat demonstration.

_____ 6. RC will

Demonstrate how to use equipment to complete transaction.

Future Associate will
Repeat demonstration.

_____ 7. RC will

Explain value sell technique (**GIST**).

Future Associate will
Explain value sell.

Training Worksheet

Task: Selling and Accepting International Mail Return Receipt

_____ 8. RC will

Explain customer payment options and process payment (**GIST**).

Future Associate will
State customer payment options and process payment.

_____ 9. RC will

Explain closing professionally (**GIST**).

Future Associate will
Explain professional closing.

_____ 10. RC will

Future Associate will

How tested:

_____ Role-play

_____ Customer

Date: _____

Training Worksheet

Lesson #21

Task Name:
Accepting and Processing Bank Cards

Terminal Objective: review with future Associate
How to Accept and Process a Bank Card Transaction on the TRANZ 380

Prerequisites:
_____ Sales and Services Associate Training
_____ Review **GIST**

NOTE: This training process begins after the sale of a product or service.

Training Tools:

_____ TRANZ 380	_____ POS ONE Quick Reference Guide
_____ IRT/POS	_____ Pen/pencil
_____ Training bank card	
_____ Customer (role-play)	

Training Worksheet

Task: Accepting and Processing Bank Cards

_____ 1. RC will

Explain types of bank cards accepted and review information on card (**GIST**).

Future Associate will

State what types of cards are accepted and review items on card.

_____ 2. RC will

Demonstrate what keys are used on Trans 380 to process transaction.

Future Associate will

Repeat demonstration.

_____ 3. RC will

Demonstrate how to swipe the customer bank card.

Future Associate will

Repeat demonstration.

_____ 4. RC will

Demonstrate entering 2-digit ID and 4-digit password for amount of sale.

Future Associate will

Repeat demonstration.

_____ 5. RC will

Explain reviewing signature compared to bank card and proper distribution of receipts.

Future Associate will

State reviewing signature and distribution of receipts.

_____ 6. RC will

Explain closing professionally (**GIST**).

Future Associate will

Demonstrate professional closing.

_____ 7. RC will

Explain securing original receipt of transaction.

Future Associate will

State securing original receipt.

Training Worksheet

Task: Accepting and Processing Bank Cards

_____ 8. RC will

Future Associate will

_____ 9. RC will

Future Associate will

_____ 10. RC will

Future Associate will

How tested:

_____ Role-play

_____ Customer

Date: _____

Training Worksheet

Lesson #22

Task:

Cashing Domestic Postal Money Orders

Terminal Objective: review with future Associate

How to Cash a Domestic Postal Money Order

Prerequisites:

_____ Sales and Services Associate Training Course

_____ Review **GIST**

_____ Knowledge of *Postal Bulletin*

Supplies and Equipment Needed for This Training Session:

_____ *Postal Bulletin*

_____ Round date stamp

_____ *Domestic Mail Manual*

_____ Bank deposit stamp

_____ Customer (role-play)

_____ IRT/POS ONE System

_____ Training Money Order

_____ *Postal Operations Manual*

_____ Pen/pencil

_____ Play Money (training)

Training Worksheet

Task: Cashing Domestic Postal Money Orders

_____ 1. RC will

Demonstrate professional greeting technique (**GIST**).

Future Associate will
Repeat demonstration.

_____ 2. RC will

Demonstrate how to ask clarifying questions to determine customer needs (**GIST**).

Future Associate will
Repeat demonstration.

_____ 3. RC will

Explain how to verify that funds are available (bank secrecy act).

Future Associate will
Verify funds are available.

_____ 4. RC will

Explain customer requirements i.e., ID and examine money order (**GIST**).

Future Associate will
State customer requirements.

_____ 5. RC will

Demonstrate checking money against stolen money order list and checking watermark.

Future Associate will
Repeat demonstration.

_____ 6. RC will

Demonstrate where customer signs money order, verify signature, and stamp deposit endorsement (IRT).

Future Associate will
Repeat demonstration.

_____ 7. RC will

Explain how to enter transaction into retail equipment and count funds to customer. Enter on list.

Future Associate will
Repeat statement, then demonstrate.

Training Worksheet

Task: Cashing Domestic Postal Money Orders

_____ 8. RC will

Explain value sell (**GIST**).

Future Associate will
Explain value sell.

_____ 9. RC will

Explain entering money order on PS Form 1412 as check if customer purchases a product or service, explain customer payment options and process payment (**GIST**).

Future Associate will
Enter money order on PS Form 1412. If customer makes additional purchase, state customer payment options and process payment.

_____ 10. RC will

Explain closing professionally (**GIST**).

Future Associate will
Demonstrate closing professionally.

How tested:

_____ Role-play

_____ Customer

Date: _____

Training Worksheet

Lesson #23

Task:

Securing and Accounting for Domestic Money Orders

Terminal Objective: review with future Associate

How to Secure and Account for Domestic Money Orders

Prerequisites:

_____ Sales and Services Associate Training

Supplies and Equipment Needed for This Training Session:

_____ Domestic Money Orders from designated employee

_____ IRT/POS ONE System _____ POS ONE Quick Reference Guide

_____ Cash drawer

_____ Supervisor

_____ Pen/pencil

_____ PS Form 17

Training Worksheet

Task: Securing and Accounting for Domestic Money Orders

_____ 1. RC will

Explain proper ordering procedures using PS Form 17 and handing to designated employee.

Future Associate will
Order using PS Form 17.

_____ 2. RC will

Demonstrate opening block set of money order package and verifying sequence (count).

Future Associate will
Repeat demonstration.

_____ 3. RC will

Explain matching money order sequence to log book, then sign.

Future Associate will
Show matching money orders to log book and sign.

_____ 4. RC will

Explain procedures for entering domestic money orders into IRT/POS ONE.

Future Associate will
Enter money orders into IRT/POS ONE.

_____ 5. RC will

Explain the importance of issuing money orders in sequence and storage of money orders.

Future Associate will
State importance of issuing money orders in sequence.

_____ 6. RC will

Explain that money orders should not be transferred between clerks except in an emergency and how to complete this process. **Note:** *Money orders cannot be transferred between clerks on POS.*

Future Associate will
State that money orders cannot be transferred between clerks except in an emergency and explain process.

_____ 7. RC will

Explain office security measures at retail counter and at the end of tour.

Future Associate will
State office security measures at the retail counter and at the end of tour.

Training Worksheet

Task: Securing and Accounting for Domestic Money Orders

_____ 8. RC will

Future Associate will

_____ 9. RC will

Future Associate will

_____ 10. RC will

Future Associate will

How tested:

_____ Role-play

_____ Customer

Date: _____

Training Worksheet

Lesson #24

Task:
Renting a Post Office Box

Terminal Objective: review with future Associate
How to Rent a Post Office Box

Prerequisites:
_____ Sales and Services Associate Training Course
_____ Review **GIST**

Supplies and Equipment Needed for This Training Session:

_____ PS Form 1538	_____ Round date stamp
_____ PS Form 3544	_____ <i>Domestic Mail Manual</i>
_____ PS Form 1093	_____ <i>Postal Operations Manual</i>
_____ PS Form 1091	_____ IRT/POS ONE System
_____ P. O. Box rent fee schedule	_____ Pen/pencil
_____ Vacant Post Office Box	_____ Customer (role-play)
_____ Post Office Box keys	

Training worksheet

Task: Renting a Post Office Box

_____1. RC will

Demonstrate professional greeting technique (**GIST**).

Future Associate will
Repeat demonstration.

_____2. RC will

Demonstrate how to ask clarifying questions to determine customer needs (**GIST**).

Future Associate will
Repeat demonstration.

_____3. RC will

Demonstrate how to help customer complete the PS Form 1093 (advise about no individual change of address from a Post Office Box).

Future Associate will
Repeat demonstration.

_____4. RC will

Demonstrate how to review and verify application information. Complete information on PS Form 1091-A.

Future Associate will
Repeat demonstration.

_____5. RC will

Demonstrate how to issue correct box size, key(s), and PS Form 3575 if needed.

Future Associate will
Repeat demonstration.

_____6. RC will

Explain how to enter information on retail equipment and demonstrate how to fill out PS Form 1538.

Future Associate will
Repeat demonstration.

_____7. RC will

Demonstrate how to complete PS Form 3544.

Future Associate will
Repeat demonstration.

Training Worksheet

Task: Renting a Post Office Box

_____ 8. RC will

Explain value sell technique (GIST).

Future Associate will
Explain value sell.

_____ 9. RC will

Explain customer payment options and process payment (GIST).

Future Associate will
State customer payment options and process payment.

_____ 10. RC will

Explain closing professionally (GIST). Follow local procedures for form disposition.

Future Associate will
Close professionally.

How tested:

_____ Role-play

_____ Customer

Date: _____

Training Worksheet

Lesson #25

Task:

Delivering Registered Mail

Terminal Objective: review with future Associate

How to Deliver Registered Mail

Prerequisites:

- _____ Sales and Services Retail Training
- _____ Knowledge of *Domestic Mail Manual*
- _____ Knowledge of *Postal Bulletins*
- _____ Review **GIST**

Supplies and Equipment Needed for This Training Session:

- _____ *Domestic Mail Manual*
 - _____ *International Mail Manual*
 - _____ *Postal Operations Manual*
 - _____ PS Forms 3849, 3811, 3854
 - _____ Customer (role-play)
 - _____ Role-play samples
 - _____ IRT/POS ONE System
 - _____ Round date stamp
 - _____ Pen/pencil
-

Training Worksheet

Task: Delivering Registered Mail

_____ 1. RC will

Demonstrate professional greeting technique (**GIST**).

Future Associate will
Repeat demonstration.

_____ 2. RC will

Explain obtaining PS Form 3849 from customer, reviewing form, and requesting identification. If customer has no PS Form 3849, inquire and review identification (**GIST**).

Future Associate will
Repeat demonstration.

_____ 3. RC will

Demonstrate retrieving article in unit **after** securing equipment and cash drawer.

Future Associate will
Repeat demonstration.

_____ 4. RC will

Explain purpose for maintaining control of article.

Future Associate will
State purpose of maintaining control of article.

_____ 5. RC will

Demonstrate where customer signs for article on PS Forms 3849 and 3811, if applicable. Explain non-revenue key on equipment and depress.

Future Associate will
Repeat demonstration.

_____ 6. RC will

Explain value sell techniques (**GIST**).

Future Associate will
Demonstrate value sell.

_____ 7. RC will

Explain customer payment options and process payment if customer makes purchase (**GIST**).

Future Associate will
State customer payment options and process payment.

Training Worksheet

Task: Delivering Registered Mail

_____ 8. RC will

Explain closing professionally (**GIST**).

Future Associate will
Demonstrate professional closing.

_____ 9. RC will

Explain/demonstrate how and where to file PS Form 3849 locally.

Future Associate will
Repeat demonstration.

_____ 10. RC will

Future Associate will

How tested:

_____ Role-play

_____ Customer

Date: _____

Training Worksheet

Lesson #26

Task:

Delivering Express Mail

Terminal Objective: review with future Associate

How to Deliver an Express Mail Article

Prerequisites:

_____ Sales and Services Retail Training Program

_____ Review of **GIST**

Supplies and Equipment Needed for This Training Session:

_____ Training item Express Mail if no "Live" piece available

_____ Customer (role-play)

_____ PS Form 3849

_____ IRT/POS ONE System

_____ Pen/pencil

_____ *Postal Operations Manual*

Training Worksheet

Task: Delivering Express Mail

_____ 1. RC will

Demonstrate professional greeting technique (**GIST**).

Future Associate will
Repeat demonstration.

_____ 2. RC will

Explain reviewing customer's PS Form 3849 and requesting to see identification.

Future Associate will
Review PS Form 3849 and customer's identification.

_____ 3. RC will

Using security procedures, show office location of Express Mail item and retrieve.

Future Associate will
Repeat demonstration.

_____ 4. RC will

Explain what blocks the customer and the employee complete. If applicable, perform delivery scan.

Future Associate will
State what blocks are completed.

_____ 5. RC will

Explain removing USPS copy of form and handing customer the item.

Future Associate will
Repeat demonstration.

_____ 6. RC will

Explain value sell technique. Explain waiver of signature (**GIST**).

Future Associate will
Demonstrate value sell.

_____ 7. RC will

Explain customer payment options and process payment if customer makes purchase (**GIST**).

Future Associate will
State customer payment options and process payment.

Training Worksheet

Task: Delivering Express Mail

_____ 8. RC will

Explain closing professionally (**GIST**).

Future Associate will
Demonstrate professional closing.

_____ 9. RC will

Explain/demonstrate where to file Express Mail label locally.

Future Associate will
Repeat demonstration.

_____ 10. RC will

Future Associate will

How tested:

_____ Role-play

_____ Customer

Date: _____

Training Worksheet

Lesson #27

Task:

Delivering Certified Mail

Terminal Objective: review with future Associate

How to Deliver Certified Mail

Prerequisites:

_____ Sales and Services Retail Training Program

_____ Review **GIST**

Supplies and Equipment Needed for This Training Session:

_____ Customer (role-play)

_____ *Domestic Mail Manual*

_____ Sample item

_____ *Postal Operations Manual*

_____ Round date stamp

_____ Pen/pencil

_____ PS Form 3849

_____ IRT/POS ONE System

Training Worksheet

Task: Delivering Certified Mail

_____ 1. RC will

Demonstrate professional greeting technique (**GIST**).

Future Associate will
Repeat demonstration.

_____ 2. RC will

Explain obtaining PS Form 3849 from customer, reviewing form, and requesting identification. If customer has no PS Form 3849, inquire and review identification (**GIST**).

Future Associate will
Repeat demonstration.

_____ 3. RC will

Explain checking customer's identification and then retrieving article (secure cash drawer and equipment).

Future Associate will
Repeat demonstration.

_____ 4. RC will

Explain identifying the certified item as correct and then reviewing item for return receipt.

Future Associate will
Repeat demonstration.

_____ 5. RC will

Explain where customer signs for item on PS Form 3849 and PS Form 3811 return receipt (if needed).

Future Associate will
Repeat demonstration.

_____ 6. RC will

Explain where to sign and date USPS blocks on PS Forms 3849 and 3811(if needed). Explain the non-revenue key on retail equipment.

Future Associate will
Repeat demonstration.

_____ 7. RC will

Explain value sell techniques (**GIST**).

Future Associate will
Demonstrate value sell.

Training Worksheet

Task: Delivering Certified Mail

_____ 8. RC will

Suggest customer payment options and process payment. This process is used only if customer makes a purchase (**GIST**).

Future Associate will
State customer payment options and process payment.

_____ 9. RC will

Explain closing professionally (**GIST**).

Future Associate will
Demonstrate professional closing.

_____ 10. RC will

Explain/demonstrate where PS Forms 3849 are stored locally.

Future Associate will
Repeat demonstration.

How tested: _____ Role-play _____ Customer

Date: _____

Training Worksheet

Lesson #28

Task:

Delivering Postage Due or Business Reply Mail

Terminal Objective: review with future Associate

How to Deliver Postage Due or Business Reply Mail

Prerequisites:

_____ Sales and Services Associate Training

_____ Review **GIST**

Supplies and Equipment Needed for This Training Session:

_____ PS Form 3849

_____ *Domestic Mail Manual*

_____ PS Form 1096

_____ *Postal Operation Manual*

_____ PS Form 3805

_____ Customer (role-play)

_____ Postage meter/ PVI

_____ Pen/pencil

_____ Stamps

_____ IRT/POS System

_____ Postage due and business reply mail samples, if no "live mail" available for training

Training Worksheet

Task: Delivering Postage Due or Business Reply Mail

_____ 1. RC will

Demonstrate professional greeting technique (**GIST**).

Future Associate will
Repeat demonstration.

_____ 2. RC will

Demonstrate how to ask clarifying questions to determine customer needs (**GIST**).

Future Associate will
Repeat demonstration.

_____ 3. RC will

Explain retrieving PS Form 3849 from customer and retrieve article. Follow security procedures for securing cash drawer.

Future Associate will
State retrieving PS Form 3849 from customer and retrieving article.

_____ 4. RC will (ON IRT)

Explain collecting fees from customer and processing and attaching PVI/meter strip/stamps to correct form.

Future Associate will
Collect fees and print PVI, then attach to form on mailpiece.

_____ 5. RC will

Explain value sell technique (**GIST**).

Future Associate will
Explain value sell.

_____ 6. RC will

Explain customer payment options and process payment (**GIST**).

Future Associate will
State customer payment options and process payment.

_____ 7. RC will

Explain closing professionally (**GIST**).

Future Associate will
Demonstrate professional closing.

Training Worksheet

Task: Delivering Postage Due or Business Reply Mail

_____ 8. RC will

Future Associate will

_____ 9. RC will

Future Associate will

_____ 10. RC will

Future Associate will

How tested:

_____ Role-play

_____ Customer

Date: _____

Training Worksheet

Lesson #29

Task:

Delivering Domestic Insured Mail

Terminal Objective: review with future Associate

How to Deliver an Insured Article

Prerequisites:

_____ Sales and Services Retail Training Program

_____ Review **GIST**

_____ Knowledge of *Domestic Mail Manual*

Supplies and Equipment Needed for This Training Session:

_____ Customer (for role-play)

_____ Round date stamp

_____ PS Form 3849

_____ Article for training

_____ Pen/pencil

Training Worksheet

Task: Delivering Domestic Insured Mail

_____ 1. RC will

Demonstrate professional greeting technique (**GIST**).

Future Associate will
Repeat demonstration.

_____ 2. RC will

Explain obtaining PS Form 3849 from customer, reviewing form, and requesting identification. If customer has no PS Form 3849, inquire and review identification (**GIST**).

Future Associate will
Repeat demonstration.

_____ 3. RC will

Explain retrieving parcel in unit securing cash drawer and equipment.

Future Associate will
Secure equipment and cash drawer, then retrieve parcel in unit.

_____ 4. RC will

Explain reviewing parcel condition for any damage.

Future Associate will
State reviewing article for damage.

_____ 5. RC will

Demonstrate where customer signs PS Forms 3849 and 3811(if needed). Explain the use of the non-revenue transaction key on retail equipment.

Future Associate will
Repeat demonstration.

_____ 6. RC will

Show how clerk completes USPS blocks on forms and then hands customer the item. If customer makes purchase, explain customer payment options and process payment (**GIST**).

Future Associate will
Demonstrate where customer signs for article. State customer payment options and process payment.

_____ 7. RC will

If applicable, explain procedure of how to deal with customer if item is damaged.

Future Associate will
Repeat demonstration.

Training Worksheet

Task: Delivering Domestic Insured Mail

_____ 8. RC will

Explain value sell techniques (**GIST**).

Future Associate will
Demonstrate value sell.

_____ 9. RC will

Explain closing professionally (**GIST**).

Future Associate will
Demonstrate professional closing.

_____ 10. RC will

Explain/demonstrate how and where to file PS Forms 3849 locally.

Future Associate will
Repeat demonstration.

How tested: _____ Role-play _____ Customer

Date: _____

Training Worksheet

Lesson #30

Task:

Delivering Collect-On-Delivery (COD) Articles

Terminal Objective: review with future Associate

How to Deliver a Collect on Delivery (COD) Article

Prerequisites:

_____ Sales and Services Retail Training Program

_____ Review **GIST**

Supplies and Equipment Needed for This Training Session:

_____ *Postal Operations Manual*

_____ IRT/POS ONE System

_____ PS Form 3816

_____ Pen/pencil

_____ PS Form 3849

_____ Live article or sample for training

_____ Customer (role-play)

Training Worksheet

Task: Delivering Collect-On-Delivery (COD) Articles

_____ 1. RC will

Demonstrate professional greeting technique (**GIST**).

Future Associate will
Repeat demonstration.

_____ 2. RC will

Explain obtaining customer's PS Form 3849, reviewing form, and requesting identification. If customer has no PS Form 3849, inquire and review identification (**GIST**).

Future Associate will
Repeat demonstration.

_____ 3. RC will

Using security procedures, explain where to retrieve item and how to verify you have the correct article.

Future Associate will
Demonstrate retrieving item and state review.

_____ 4. RC will

Explain maintaining control of article until fees have been collected.

Future Associate will
State maintaining control of item.

_____ 5. RC will

Explain payment options and collect fees. Also check item for return receipt. Use on retail equipment to complete transaction.

Future Associate will
Repeat demonstration.

_____ 6. RC will

Explain how to complete COD forms, including scanning COD label (POS).

Future Associate will
Repeat demonstration.

_____ 7. RC will

Explain value sell technique (**GIST**).

Future Associate will
Demonstrate value sell.

Training Worksheet

Task: Delivering Collect-On-Delivery (COD) Articles

_____ 8. RC will

Explain customer payment options and process payment, if customer makes purchase (no credit card for COD payment) (**GIST**).

Future Associate will
State customer payment options and process payment.

_____ 9. RC will

Explain closing professionally (**GIST**).

Future Associate will
Demonstrate professional closing.

_____ 10. RC will

Explain trust procedures of handling fees collected. Explain remitting if local policy and filing system, locally.

Future Associate will
Repeat demonstration.

How tested:

_____ Role-play

_____ Customer

Date: _____

Training Worksheet

Lesson #31

Task:

Dispatching Registered Mail to the Processing and Distribution Center

Terminal Objective: review with future Associate

How to Dispatch Registered Mail to the Processing and Distribution Center

Prerequisites:

_____ Sales and Services Associate Training Course

_____ Knowledge of *Postal Operations Manual*

_____ DM-901

Supplies and Equipment Needed for This Training Session:

_____ Registry Equipment (seals, carbon paper, locks)

_____ PS Form 3854 _____ Pen/pencil

_____ Dispatch equipment

_____ Round date stamp

_____ Samples for training

_____ Register control card

Training Worksheet

Task: Dispatching Registered Mail to the Processing and Distribution Center

_____ 1. RC will

Explain/demonstrate all the necessary forms and equipment needed and the location of where to find items in unit.

Future Associate will
Collect all required forms and equipment and explain their use.

_____ 2. RC will

Explain all entries of dispatch forms.

Future Associate will
Complete all entries on forms.

_____ 3. RC will

Show where to locate article numbers on PS Form 3854 and verify.

Future Associate will
Explain where to locate article numbers and verify.

_____ 4. RC will

Explain closeout of PS Form 3854.

Future Associate will
Close out form.

_____ 5. RC will

Review district operating procedures (SOP) and complete required forms if necessary.

Future Associate will
Review SOP and complete additional forms if required.

_____ 6. RC will

Demonstrate proper procedure for sealing and securing register equipment.

Future Associate will
Repeat demonstration.

_____ 7. RC will

Explain how to dispatch item to designated employee.

Future Associate will
State how to dispatch to designated employee.

Training Worksheet

Task: Dispatching Registered Mail to the Processing and Distribution Center

_____ 8. RC will

Future Associate will

_____ 9. RC will

Future Associate will

_____ 10. RC will

Future Associate will

How tested:

_____ Role-play

_____ Customer

Date: _____

Training Worksheet

Lesson #32

Task:

Working With the *Express Mail Network Directory*

Terminal Objective: review with future Associate

How to Determine the Service Commitment for Domestic Express Mail using Directory

Prerequisites:

_____ Sales and Services Retail Training Program

_____ Review **GIST**

Supplies and Equipment Needed for This Training Session:

_____ Current *Express Mail Directory*

_____ IRT/POS ONE System

_____ Scale (for manual offices)

_____ Label 11a or b

_____ *Postal Bulletin*

_____ Pen/pencil

_____ *ZIP Code Directory*

Note to all RCs teaching this session:

Training steps that are specific to clarifying questions to be asked of customer must include pertinent information on any or all of the following:

- **HAZMAT**
 - **Aviation Security**
-

Training Worksheet

Task: Working With the Express Mail Network Directory

_____ 1. RC will

Demonstrate professional greeting technique (**GIST**).

Future Associate will
Repeat demonstration.

_____ 2. RC will

Demonstrate how to ask clarifying questions to determine customer needs (**GIST**).

Future Associate will
Repeat demonstration.

_____ 3. RC will

Demonstrate retrieving *ZIP Code Directory* and using it to obtain customer's ZIP Code of destination (**GIST**).

Future Associate will
Repeat demonstration.

_____ 4. RC will

Explain a.m./p.m. next day or second day service.

Future Associate will
State purpose of a.m./p.m. next day or second day service.

_____ 5. RC will

Explain giving customer correct information (**GIST**).

Future Associate will
Give customer correct information.

_____ 6. RC will

Explain value sell technique (**GIST**).

Future Associate will
Demonstrate value sell.

_____ 7. RC will

Explain customer payment options and process payment (**GIST**).

Future Associate will
State customer payment options and process payment.

Training Worksheet

Task: Working With the Express Mail Network Directory

_____ 8. RC will

Explain closing professionally (**GIST**).

Future Associate will
Demonstrate professional closing.

_____ 9. RC will

Return directory to proper location, if applicable.

Future Associate will
Repeat demonstration.

_____ 10. RC will

Future Associate will

How tested:

_____ Role-play

_____ Customer

Date: _____

(This Page Intentionally Left Blank)

Appendix A: Retail Customized Materials for Structured On-the-Job Training Course #23501- 00 or #23501- 01, Facilitator's Guide

The Retail Sales and Services Associates Training program requires successful completion of the course #23501-00 or #23501-01 (Structured On-the-Job Training.) The materials in this appendix are customized to meet the retail requirements for structured on-the-job training. These materials replace the generic structured on-the-job training course materials for Module 4 of the Facilitator's Guide. Similarly, the materials in Appendix B replace the generic course materials for Module 4 of the Participant's Guide.

1. Module 4R: Preparation and Delivery of Structured On-the-Job Training for Retail - Sales and Services Associates Training. This module replaces Module 4 in the generic structured on-the-job training course #23501-00 or #23501-01.

(This Page Intentionally Left Blank)

Module 4R: Preparation and Delivery of Structured On-the-Job Training for Retail - Sales and Services Associates Training
(Allotted time: 235 minutes)

Materials for this Module:

Slides # 10, 11, 12 and 13

Lesson plan sheets (sufficient supply of blank copies for class size)

PS Forms 2548 and 2432 (sufficient supply of blank copies for class size)

Blank sheets of construction paper (sufficient supply for class size)

Scissors (4)

Twenty water-based colored markers

Four rip charts and easels and masking tape (to post the rip charts as permitted)

Overhead or other media projector for slides

Materials for three Retail processes to be obtained from a local Retail installation:

- a. Selling and accepting a Registered Mail COD article: PS Form 3816 and PS Form 3806
- b. Selling and processing Global Priority Mail: *International Mail Manual* (IMM); Global Priority mailing supplies; Custom Forms; *Postal Bulletin*
- c. Hand-to-hand exchange of Registered Mail: carbon paper; PS Forms 3854 and 3830; *Domestic Mail Manual* (DMM); *International Mail Manual* (IMM)

Learning Objectives:

Upon completing this module participants will be able to:

1. Perform a task or process breakdown.
2. Complete a structured OJT lesson plan.
3. Prepare basic job aids.
4. Deliver a structured OJT lesson plan using at least one job aid and completing the required training tracking forms (SOJT lesson plan, PS Forms 2548 and 2432).

Module Overview:

This module provides the learner with basic guidelines for the successful implementation of SOJT through planning, preparation of structured lesson plans and job aids to facilitate learning. This module is divided into three parts:

- Preparing for SOJT (approximately 90 minutes)
- Practicum for delivering SOJT (approximately 135 minutes)
- Module recap (approximately 10 to 15 minutes)

Instructions:

1. Review the learning objectives and the module overview. Point out that in this retail-specific module, the term OJI/retail coach is used.
2. The topics covered in the first section on “Preparing for SOJT” include guidelines for planning SOJT, developing SOJT lesson plans and job aids. This section contains both guided discussions and activities.
3. **Show slide #10** and follow the guided discussion notes below.



Guided Discussion:

- a. Discuss the importance of working with the SOJT coordinator to plan for SOJT.
 - b. Remind participants that during the discussion on “Benefits of SOJT,” we reviewed the importance of the OJI/retail coach – SOJT coordinator relationship and the need to work collaboratively in order to effectively implement structured on-the-job-training. Point out that this slide reflects our earlier discussion, whereby training on best practices requires the inclusion of key stakeholders in implementing SOJT and in developing structured lesson plans for instruction. Ultimately, we must accept the fact that we cannot plan for training in isolation.
 - c. Emphasize that our cooperation and collaborative efforts will help us meet the organizational goal of having the right people, in the right place, with the right tools, at the right time to consistently provide superior customer value. Point out that we must also recognize the importance of coordinating our efforts with the PEDCs, to ensure that tracking of the training and training records is kept current.
 - d. **Facilitator’s Note: Show slide #11** and discuss implementing SOJT. Cover the points below. These reflect the considerations that ensure effective implementation.
- Keep it simple. The USPS has many complex systems. SOJT must be seamlessly integrated into these systems to avoid unnecessary work. The work related to SOJT implementation must add value to our systems. Training that is both effective and efficient adds value in terms of reduced errors and the costs associated with poor work quality.

- SOJT must be user friendly and easy to manage. Keeping the training simple in terms of both process and content will help foster its acceptance.
 - The SOJT must be compatible with existing USPS training and tracking documentation systems. Such compatibility facilitates acceptance.
 - SOJT must focus on critical competencies because these are correlated with critical core processes, which are those required in the organization’s daily operations that affect every piece of mail.
 - Critical competencies and their respective core processes must comprise the building blocks of an SOJT learning/training matrix.
 - When we adhere to an instructional method that facilitates the capturing of best practices, we add value to the critical core processes through effective and efficient training. Therefore, effective SOJT is process-driven, yet learner-centered.
 - The SOJT must allow for multiple instructional strategies to accommodate diversity in people’s learning styles and needs.
 - Learning must be verifiable (best practices must be captured in a structured lesson plan to ensure consistency in instruction) and certifiable (to ensure that the technical process reflects the best practices).
4. Field questions before proceeding to the next topic.
 5. Introduce the next topic in this section: Preparing for SOJT. Explain that this section covers the use of the prescribed lesson plan format, the application of the 8-step method in developing an SOJT lesson plan and guidelines for creating job aids. Allow approximately 10 minutes to cover the information below before introducing “Create an SOJT Lesson Plan using a Snowflake Activity.”
 6. Distribute the handout copy of the retail SOJT lesson plan (training worksheets), and inform learners that blanks are included in the Guide under the Toolkit section, which they can use as photocopy masters to make copies from in the future.
 7. Direct learners to read along as you review the training worksheets.
 - a. Introduction. Hello, my name is _____. I am your retail coach.
 - b. The task we are going to work on today is (read from task name).

- c. By the end of this session, you will be able to (read from terminal objective).
- d. The prerequisites for performing this task are that you have already taken the Sales and Service Retail Training Program. In addition, I'd like to review **GIST** with you before we begin. Briefly, review "Greet, Inquire, Suggest and Thank."
- e. If the training is done with a customer, check off "Customer" under "How Tested?" If training is done by having the OJI/retail coach role-play the part of a customer, check off "Role Play with OJI/retail coach."
- f. For training purposes, review each step of the Training Worksheet by showing and telling the things listed under "OJI/retail coach will" and having the trainee repeat the demonstration by doing the things listed under "Trainee will." Do this for all steps listed (up to 10 for each process).
- g. For certification, either with trainer acting as customer or with a real customer, have the trainee demonstrate the tasks listed. Check off the steps that were completed correctly by the trainee. If the trainee misses a step and a customer is present, remind him/her of the step and have him/her complete the task starting at the error. After the customer leaves, have the trainee go through the entire task and check off the steps that were completed correctly. If the trainee misses a step and a role-play is being used, have the trainee complete the entire task again. If the trainee misses the step twice, this should be recorded by placing an X next to the step.
- h. At the end of the form, indicate the number of steps completed correctly by counting the number of check marks and placing the number in the space for "completed steps." Indicate the number of steps either completed incorrectly or not completed by counting the number of Xs and placing the number in the space for "uncompleted steps."
- i. Date and sign the document.
- j. Indicate the estimated training time for the task. This should include the showing and telling as well as the repeated demonstration by the trainee.
- k. The scoring system involves scoring the OJI/retail coach portion of the exam separately from the computer-administered portion. The computer-administered exam is scored such that a passing score is 80 percent correct (40 out of 50 items correct). The retail coach portion is scored such that the examinee has to get 70 percent of the processes answered correctly. Any given process is "correct" if the examinee successfully completes 80 percent of the steps in the lesson plan. This is different from the current compensatory system in which a high score on the OJT can offset a low score on the computerized exam.

- I. The task/process analysis or breakdown, provides a step-by-step description of all of the observable, measurable and attainable performance elements that make up a task or process. The task or process has well-defined start (input) and end (output) parameters. In SOJT it is important to clarify expectations in performing the steps of the task/process competently. It is recommended that the lesson plan not exceed ten steps so as to ensure that the learner will be successful in achieving the desired competency level of performance without feeling overwhelmed by a lot of new information.
8. This activity is optional. Use the example below to illustrate the key points of structuring a lesson plan if you determine that participants would benefit from additional practice. If you decide to omit this activity, review the key points covered in the notes below.

 **Activity Instructions:**

- a. Direct participants to use the blank lesson plan sheet you distributed to write down the steps as you go through the example. Indicate that this example pertains to the orientation of new employees, and that the only prerequisite is using the XYZ Phone System. Allow 10 minutes for this activity.

Example: This example is based on a receptionist's job description at XYZ company.

The target process requires the receptionist to respond to incoming calls. The competency objective states: Upon successful completion of this training the learner will be able to respond to incoming calls.

When the phone rings...

Answer the telephone (within three rings).

- Pick up the receiver.
 - Greet the caller, identify yourself and/or the department, and ask how you may be of help.
 - Respond to the caller's request.
 - Complete the telephone interaction by asking if there is anything else you can do.
 - Replace the receiver.
- b. Point out that in this example, the learner knows that there are five steps to responding to incoming calls (each step is observable). The learner knows that the phone must be answered within three rings (measurable) and has the ability to answer the phone according to the prescribed procedure (attainable).

- c. Indicate that in this example, it would also be important to explain to the learner why incoming calls should be answered within three rings (i.e., prior customer surveys indicate that callers become frustrated if their calls are not answered within three rings). It would be equally important to review why each action step is important in the overall process and how the overall process impacts customer satisfaction for the organization. Field questions before proceeding to the next activity.
9. Introduce the “Create an SOJT Lesson Plan Using a Snowflake Activity.” Explain that the purpose of this activity is to give the participants experience in developing and using the SOJT lesson plan. Allow 40 minutes for this activity.

Materials: several blank sheets of construction paper, scissors (4), and blank SOJT lesson plan sheets.

Activity Instructions:


- a. Divide the group into two smaller groups. Request that one person from each group serve as the process observer and reporter.
- b. Assign each group a snowflake process. Have the “model” available for each group. (Note: the Snowflake Model is in the Facilitator’s Guide Toolkit.) One group will be instructed to create a five-step process lesson plan; the other will be instructed to create a four-step process lesson plan.
- c. Direct each group process observer to take notes on how the members of their assigned group planned the task/process analysis or breakdown; note observations with respect to the members’ learning styles and/or methods of approaching the activity.
- d. Allow 20 minutes for this phase of the activity. After 20 minutes, ask everyone to reconvene into the larger group. Ask each observer to report to the larger group. Ask a person from each group to exhibit his/her group’s model and the steps of its process.
- e. In debriefing, be sure to highlight the importance of including key stakeholders in the development of best practices. Ask the group: “Which of the two had the ‘BEST’ practice?” (See below.)

A helpful mnemonic to share for **BEST** practice documentation is

B ...Be mindful of
E ...Effectiveness and Efficiency
S ...Safety comes first in
T ... Training

10. Introduce the “Developing a Job Aid Activity.” Explain that the purpose of this activity is to provide participants with the experience of developing a basic job aid. Allow 30 minutes for this activity.

Materials: Slides # 12 and 13

 **Activity Instructions:**

- a. Show slides #12 and 13. Review the information on the slides.
 - b. Divide the learners into their respective “snowflake process” groups from the previous activity and instruct them to prepare a job aid for their respective snowflake process.
 - c. Have the groups reconvene and ask for a reporter from each group to share the outcomes.
 - d. Field questions before proceeding to the next section.
11. Introduce Practicum on Delivering SOJT. Explain that in this section participants will have the opportunity to apply the basic strategies and methodology for structured OJT using assigned Retail work processes.

Materials needed for this activity: blank lesson plan forms, blank Postal Service training tracking forms, rip charts and markers, adhesive notes, and retail-specific items for three retail processes to be obtained from a local retail installation:

- Selling and accepting a Registered Mail COD article: PS Form 3816 and PS Form 3806
- Selling and processing Global Priority Mail: *International Mail Manual* (IMM); Global Priority mailing supplies; custom forms; *Postal Bulletin*
- Hand-to-hand exchange of Registered Mail: carbon paper; PS Forms 3854 and 3830; *Domestic Mail Manual* (DMM); *International Mail Manual* (IMM)

 **Activity Instructions:**

- a. On adhesive notes prepare an equal number of “Assigned Processes.” Choices include: Processing Global Priority Mail (IRT/POS ONE); employee hand to hand exchange of Registered Mail; selling and accepting a Registered COD article.
- b. Allow 45 minutes preparation time.
- c. Instruct learners to develop and deliver to the class an SOJT lesson plan for their assigned processes, accompanied by at least one job aid and the appropriate Postal Service training tracking forms.

- d. Allow approximately 90 minutes for presentations (e.g., 90 minutes at 6 minutes per learner for a class size of 15). **Note:** For large classes, you may divide the group into smaller groups to carry out this activity, versus having each participant work independently.
- e. Field questions before proceeding to the next topic.

12. Introduce the next topic under this section: OJI/retail coach certification overview.

Allow 20 minutes to cover this topic. Direct participants to take out the copy of the Filed Master Trainer/OJI (Retail Coach) Certification Scale included in the Toolkit. Review each statement and engage the participants in a brief discussion regarding each statement's relevancy to the topics covered in this course; i.e., adult learning theory, learning styles, constructive feedback and the SOJT 8-step method.

13. Field questions related to the certification scale and/or the course before proceeding to the module recap.

The module recap section begins on the following page.

§ Module Recap. Allow approximately 10 -15 minutes for this activity.

This activity provides participants with a structured approach to reflect on the content (i.e., knowledge and skills) and process (i.e., instructional methods) covered in the module. It allows for a review of the learning objectives and facilitates learning consolidation by personalizing the learning experience. It promotes collaborative learning and teaming among participants through the use of small and large group participation.

Instructions:

1. Divide the class into four small groups of approximately equal number. Provide each group with a rip chart and markers so that they can caucus as directed below.
2. Direct each group to select a scribe and a reporter. Encourage each group to rotate the assignments with each subsequent module recap, thus giving everyone an opportunity to serve in the roles of scribe and reporter.
3. Prepare a sample rip chart and direct scribes to format a similar rip chart as noted below.

Learner's View	Trainer's View
<p><u>On this side of the rip chart record the group's observations/reactions to the content of this module from a learner's point of view. For example, ask:</u></p> <ul style="list-style-type: none">• What were some of the key points?• What new terms did we learn?• What new knowledge and/or skills did we learn?• How are the key points in this module linked to my prior learning experience and/or the key points of previous modules?	<p>On this side of the rip chart record the group's observations/reactions to the content of this module from a trainer's point of view. For example ask:</p> <ul style="list-style-type: none">• What instructional techniques or methods were used?• Was constructive feedback used effectively?• Was everyone engaged in the learning process?

4. Allow approximately 5 minutes for small group discussion and recording. Reconvene, and ask each group reporter to share his/her group's outcomes with the class. Allow approximately 1 minute per report.
5. Next, ask if participants observed similarities and/or major differences between the reports. Stress the value and importance of the dual focus of this course in terms of content and process as a method for accelerated learning. Ensure learning objectives were met. List other issues/concerns, if any, on a rip chart sheet as a "parking lot," to be addressed at a later time.

(This Page Intentionally Left Blank)

Appendix B: Retail Customized Materials for Structured On-the-Job Training Course #23501- 00 or #23501- 01, Participant's Guide

The Retail Sales and Services Associates Training program requires successful completion of the course #23501-00 or #23501-01 (Structured On-the-Job Training.) The materials in this appendix are customized to meet the retail requirements for structured on-the-job training. These materials replace the generic structured on-the-job training course materials for Module 4 of the Participant's Guide.

1. Module 4R: Preparation and Delivery of Structured On-the-Job Training for Retail - Sales and Services Associates Training. This module replaces Module 4 in the Participant's Guide.

(This Page Intentionally Left Blank)

Module 4R: Preparation and Delivery of Structured On-the-Job Training for Retail - Sales and Services Associates Training (Allotted time: 235 minutes)

Learning Objectives:

Upon completing this module participants will be able to:

1. Perform a task or process breakdown.
2. Complete a structured OJT lesson plan.
3. Prepare basic job aids.
4. Deliver a structured OJT lesson plan using at least one job aid and completing the required training tracking forms (SOJT lesson plan, PS Forms 2548 and 2432).

Module Overview:

This module provides you with basic guidelines for the successful implementation of SOJT through planning, preparation of structured lesson plans and job aids to facilitate learning. This module is divided into three parts:

- Preparing for SOJT
- Practicum for delivering SOJT
- Module recap

Preparing for SOJT:

During the earlier discussion on “Benefits of SOJT,” (Module 2) we reviewed the importance of the OJI/retail coach – SOJT coordinator relationship and the need to work collaboratively in order to effectively implement structured on-the-job-training. Ultimately, we must accept the fact that we cannot plan for training in isolation.

Our cooperation and collaborative efforts will help us meet the organizational goal of having the right people, in the right place, with the right tools, at the right time to consistently provide superior customer value.

We must also recognize the importance of coordinating our efforts with the PEDCs, to ensure that tracking of the training and training records is kept current.

In addition, we must also be aware of the following considerations that will support our efforts:

- Keep it simple. The USPS has many complex systems. SOJT must be seamlessly integrated into these systems to avoid unnecessary work. The work related to SOJT implementation must add value to our systems. Training that is both effective and efficient adds value in terms of reduced errors and the costs associated with poor work quality.
- SOJT must be user friendly and easy to manage. Keeping the training simple in terms of both process and content will help foster its acceptance.
- The SOJT must be compatible with existing USPS training and tracking documentation systems. Such compatibility facilitates acceptance.
- SOJT must focus on critical competencies because these are correlated with critical core processes, which are those required in the organization’s daily operations that affect every piece of mail.
- Critical competencies and their respective core processes must comprise the building blocks of an SOJT learning/training matrix.
- When we adhere to an instructional method that facilitates the capturing of best practices, we add value to the critical core processes through effective and efficient training. Therefore, effective SOJT is process-driven, yet learner-centered.
- The SOJT must allow for multiple instructional strategies to accommodate diversity in people’s learning styles and needs.
- Learning must be verifiable (best practices must be captured in a structured lesson plan to ensure consistency in instruction) and certifiable (to ensure that the technical process reflects the best practices).

Notes:

Using the Retail Training Worksheets

Follow the guidelines below when using the retail SOJT lesson plan.

- b. Introduction. Hello, my name is _____. I am your retail coach.

- c. The task we are going to work on today is (read from task name).
- d. By the end of this session, you will be able to (read from terminal objective).
- e. The prerequisites for performing this task are that you have already taken the Sales and Service Retail Training Program. In addition, I'd like to review **GIST** with you before we begin. Briefly, review "Greet, Inquire, Suggest and Thank."
- f. If the training is done with a customer, check off "Customer" under "How Tested?" If training is done by having the OJI/retail coach role-play the part of a customer, check off "Role Play with OJI/retail coach."
- g. For training purposes, review each step of the Training Worksheet by showing and telling the things listed under "OJI/retail coach will" and having the trainee repeat the demonstration by doing the things listed under "Trainee will." Do this for all steps listed (up to 10 for each process).
- h. For certification, either with trainer acting as customer or with a real customer, have the trainee demonstrate the tasks listed. Check off the steps that were completed correctly by the trainee. If the trainee misses a step and a customer is present, remind him/her of the step and have him/her complete the task starting at the error. After the customer leaves, have the trainee go through the entire task and check off the steps that were completed correctly. If the trainee misses a step and a role-play is being used, have the trainee complete the entire task again. If the trainee misses the step twice, this should be recorded by placing an X next to the step.
- i. At the end of the form, indicate the number of steps completed correctly by counting the number of check marks and placing the number in the space for "completed steps." Indicate the number of steps either completed incorrectly or not completed by counting the number of Xs and placing the number in the space for "uncompleted steps."
- j. Date and sign the document.
- k. Indicate the estimated training time for the task. This should include the showing and telling as well as the repeated demonstration by the trainee.

- l. The scoring system involves scoring the OJI/retail coach portion of the exam separately from the computer-administered portion. The computer-administered exam is scored such that a passing score is 80 percent correct (40 out of 50 items correct). The retail coach portion is scored such that the examinee has to get 70 percent of the processes answered correctly. Any given process is “correct” if the examinee successfully completes 80 percent of the steps in the lesson plan. This is different from the current compensatory system in which a high score on the OJT can offset a low score on the computerized exam.

- m. The task/process analysis or breakdown provides a step-by-step description of all of the observable, measurable and attainable performance elements that make up a task or process. The task or process has well-defined start (input) and end (output) parameters. In SOJT it is important to clarify expectations in performing the steps of the task/process competently. It is recommended that the lesson plan not exceed ten steps so as to ensure that the learner will be successful in achieving the desired competency level of performance without feeling overwhelmed by a lot of new information.

 **Create an SOJT Lesson Plan Using a Snowflake Activity**

This activity is designed to give you some experience in developing and using the SOJT lesson plan. It also addresses basic concepts underlying best practices.

Notes:

 **Developing a Job Aid Activity**

The purpose of this activity is to provide you with an opportunity to develop a basic job aid for a specified SOJT lesson plan.

Notes:

Practicum on Delivering SOJT

In this section you will have the opportunity to apply the basic strategies and method for structured OJT using assigned retail work processes.

The three retail processes are noted below.

- a. Selling and accepting a Registered Mail COD article
- b. Selling and processing Global Priority Mail
- c. Hand-to-hand exchange of Registered Mail

You will develop and deliver an SOJT lesson plan based on your assigned retail process. At least one job aid and the appropriate Postal Service training tracking forms must accompany your lesson plan.

Notes:

OJI/Retail Coach Certification Overview

In this section you will review the evaluation statements noted in the Field Master Trainer/OJI (retail coach) Certification Scale included in the Toolkit. Review each statement, and be prepared to discuss the relevancy of each to the topics covered in this course; i.e., adult learning theory, learning styles, constructive feedback and the SOJT 8-step method.

Notes:

Module Recap

This activity provides you with a structured approach to reflect on the content (i.e., knowledge and skills) and process (i.e., instructional methods) covered in the module. It allows for a review of the learning objectives and facilitates learning consolidation by personalizing the learning experience. It promotes collaborative learning and teaming among participants through the use of small and large group participation.

Follow the facilitator's instructions for this activity. The chart below illustrates how your group should record its observations.

Learner's View	Trainer's View
<p>On this side of the rip chart record the group's observations/reactions to the content of this module from a learner's point of view. For example, ask:</p> <ul style="list-style-type: none">• What were some of the key points?• What new terms did we learn?• What new knowledge and/or skills did we learn?• How are the key points in this module linked to my prior learning experience and/or the key points of previous modules?	<p>On this side of the rip chart record the group's observations/reactions to the content of this module from a trainer's point of view. For example ask:</p> <ul style="list-style-type: none">• What instructional techniques or methods were used?• Was constructive feedback used effectively?• Was everyone engaged in the learning process?

Notes:



Retail

Structured On-the-Job Training Processes

Workbook

Course #23Q01-07

NSN #7610040008899

December 23, 1999

EMPLOYEE RESOURCE MANAGEMENT

**EMPLOYEE DEVELOPMENT/RETAIL
WORKFORCE STRATEGIES**

(This Page Intentionally Left Blank)

Retail

Structured On-the-Job Training Processes

Workbook

Course #23Q01-07

NSN #7610040008899

December 23, 1999

United States Postal Service
Employee Development/Retail Workforce Strategies
475 L'Enfant Plaza SW
Washington, D.C. 20260-4215

(This Page Intentionally Left Blank)

Use of Training Materials

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

Copyright 1999 by United States Postal Service, Washington DC 20260-4215

All rights reserved.

No part of this publication may be reproduced in any form or by any means without permission, in writing, from the United States Postal Service, Employee Development.

Certain parts of this publication may contain copyrighted materials from other sources the reproduction of which for this specific training use has been interpreted not to exceed the fair use clause of the copyright regulation (Ref. 371.5 ASM)

(This Page Intentionally Left Blank)

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

(This Page Intentionally Left Blank)

U.S. Postal Service Policy on Diversity

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

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

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

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

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

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

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

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

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

(This Page Intentionally Left Blank)

U.S. Postal Service Policy on Sexual Harassment

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

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

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

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

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

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

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

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

Report any possible criminal misconduct to the Postal Inspection Service.

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

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

(This Page Intentionally Left Blank)

PREFACE

The Retail Structured On-the-Job Core Processes were designed to provide Retail Coaches with as series of core lesson plans. Structured on-the-job training is used to acquaint employees with their new positions, to acquire knowledge and skills related to changes in work processes, and to implement refresher training.

Sample Script for Conducting Structured On-the-Job Training

1. Introduction. Hello, my name is _____. I am your RETAIL COACH.
2. The task we are going to work on today is [read from Training Worksheet]. By the end of this session, you will be able to [read from Terminal Objective]. The prerequisite for performing this task is that you have already taken the Sales and Service Associate Training Program. In addition, I'd like to review GIST with you before we begin. [Briefly, review Greet, Inquire, Suggest and Thank.]
3. For training purposes, review each step of the Training Worksheet by showing and telling the things listed under "Retail Coach will" and having the future associate repeat the demonstration by doing what is listed under "Future Associate will". Do this for all steps listed (up to 10 for each process).
4. For certification, either with the retail coach acting as customer or with an actual customer, have the future associate demonstrate the tasks listed. Check off the steps that were completed correctly by the future associate. If the future associate misses a step and a customer is present, remind him/her of the step and have him/her complete the task starting at the error. After the customer leaves, have the future associate go through the entire task and check off the steps that were completed correctly. If the future associate misses a step and a role play is being used, have the future associate complete the entire task again. If the future associate misses the step twice, place an X next to the step.
5. At the end of the form, indicate the number of steps completed correctly by counting the number of check marks and placing the number in the space for completed steps. Indicate the number of steps either completed incorrectly or not completed by counting the number of Xs and placing the number in the space for steps not completed.
6. Indicate the number of steps that were completed successfully on the Structured Training Certification Worksheet and the PS Form 2528.
7. Make it a point during day one to show the future associate all necessary emergency exits, fire extinguisher placements and emergency numbers.
8. Make it a point during day one to show the future associate the break area and personal convenience areas.
9. Take time during the first 32 core processes to cordially introduce the future associate to entire retail team which includes, the manager, customer services, supervisor, customer services and the other sales and services associates, window clerks and sales associates.

Structured On-the-Job Training Worksheet (Non-Core Lessons)

Sales and Services Associate: _____

Retail Coach: _____

Unit Trained: _____

Date Completed: _____

Unit Assigned: _____

Structured On-the-Job Training Lessons	Steps in Lesson (a)	Steps Completed Successfully (b)	Percentage of Steps Completed Successfully (c)	Retail Coach Initials	Future Associate Initials
33. Selling and Accepting a Registered Mail C.O.D. Article	9				
34. Selling and Accepting an Express Mail C.O.D. Article	9				
35. Procedures for Returning Express Mail	6				
36. Selling and Accepting Express Mail Military Service (EMMS)	10				
37. Selling and Activating a Phone Card on the IRT	7				
38. Selling and Activating a Phone Card on IBM/NCR POS ONE System	8				
39. Selling and Activating a Liberty Cash Card on the IRT	8				
40. Selling and Activating a Liberty Cash Card on IBM/NCR – POS ONE System	10				
41. Purchasing Postal Products/Services with a Liberty Cash Card	5				
42. Selling and Accepting Dinero Seguro/Sure Money	10				
43. Selling and Processing Global Priority Mail	8				
44. Selling and Accepting Priority Mail Global Guaranteed	6				
45. Exchanging of Registered Mail Between Employees	5				
46. Selling and Accepting ISAL, IPA, and Value Post to Canada	10				
47. Selling and Accepting International Express Mail	10				
48. Selling and Accepting International M-Bags	10				
49. Selling and Accepting International Special Delivery	8				
50. Selling and Accepting International Recorded Delivery	9				
51. Delivering Customs Duty Mail	9				
52. Selling International Money Orders	9				
53. Cashing MP-1 International Money Order	10				
54. Securing and Accounting of International Money Orders	9				
55. Processing an International Money Order Inquiry	4				
56. Processing a Post Office Box Caller Service Transaction	9				
57. Processing Post Office Box Records	4				
58. Procedures for Handling Overflow of Post Office Box Mail	5				
59. Procedures for Post Office Box Flagging System	2				
60. Postage Meter Setting Procedures and Accompanying Accounting Receipt	6				

Structured On-the-Job Training Worksheet (Non-Core Lessons)

Sales and Services Associate: _____

Retail Coach: _____

Unit Trained: _____

Date Completed: _____

Unit Assigned: _____

Structured On-the-Job Training Lessons	Steps in Lesson (a)	Steps Completed Successfully (b)	Percentage of Steps Completed Successfully (c)	Retail Coach Initials	Future Associate Initials
61. Examining a Postage Meter	8				
62. Exchanging Stamp Stock from a Customer	3				
63. Scanning of Express Mail Delivery Labels	7				
64. Scanning of Incoming Express Mail in a Multi-Zip or Hub Office	5				
65. Processing a PS Form 7381, Purchase of Supplies	4				
66. Processing an Emergency Salary Advance	4				
67. Processing a Travel Advance Request	3				
68. Accepting and Scanning of a Prepaid Delivery Confirmation Article	7				
69. NCR - POS ONE Sign On and Sign Off Procedures	4				
70. NCR – POS ONE Procedures for Locking and Unlocking System	3				
71. IBM - POS ONE Sign On and Sign Off Procedures	6				
72. IBM - POS ONE Procedures for Locking and Unlocking System	2				
73. IBM/NCR - POS ONE Close Out Procedures	9				
74. IBM/NCR - POS ONE Processing a Meter Refund	5				
75. POS ONE/ IRT Processing a Refund Using PS Form 3533	4				
76. IRT - MOS Close Out Procedures	10				
77. IRT Processing a Meter Refund	5				
78. IRT or POS ONE Voiding and Refunding a Debit Card Transaction	3				
79. IRT or POS ONE, or Manual Processing a Travel Request	3				
80. IRT/PVI Boot-Up Procedures for Unisys Phase III/Clerk Start of Day	5				
81. IRT or POS ONE Processing of a Self Service Equipment Refund	7				
82. Phase III IRT Start-up procedures	4				
83. Manual Close Out Daily PS Form 1412	8				
84. TRANZ 380 Voiding a Credit Card Transaction	3				
85. NCR – POS ONE Close Out Procedures	9				

STRUCTURED ON-THE-JOB PROCESSES

TABLE OF CONTENTS

33. Selling and Accepting a Registered Mail C.O.D. Article
34. Selling and Accepting an Express Mail C.O.D. Article
35. Procedures for Returning Express Mail
36. Selling and Accepting Express Mail Military Service (EMMS)
37. Selling and Activating a Phone Card on the IRT
38. Selling and Activating a Phone Card on IBM/NCR POS ONE System
39. Selling and Activating Liberty Cash Cards on the IRT
40. Selling and Activating a Liberty Cash Card on IBM/NCR - POS ONE System
41. Purchasing Postal Products and Services with a Liberty Cash Card
42. Selling and Accepting Dinero Seguro/Sure Money
43. Selling and Processing Global Priority Mail
44. Selling and Accepting Priority Mail Global Guaranteed
45. Exchanging of Registered Mail Between Employees
46. Selling and Accepting ISAL, IPA, and Value Post to Canada
47. Selling and Accepting International Express Mail
48. Selling and Accepting International M-Bags
49. Selling and Accepting International Special Delivery
50. Selling and Accepting International Recorded Delivery
51. Delivering Customs Duty Mail
52. Selling International Money Orders
53. Cashing MP-1, International Money Order
54. Securing and Accounting of International Money Orders
55. Processing an International Money Order Inquiry
56. Processing a Post Office Box Caller Service Transaction
57. Processing Post Office Box Records
58. Procedures for Handling Overflow of Post Office Box Mail
59. Procedures for Post Office Box Flagging System
60. Postage Meter Setting Procedures and Accompanying Accounting Receipt
61. Examining a Postage Meter
62. Exchanging Stamp Stock from a Customer
63. Scanning of Express Mail Delivery Labels
64. Scanning of Incoming Express Mail in a Multi-ZIP or Hub Office
65. Processing a PS Form 7381, Purchase of Supplies
66. Processing an Emergency Salary Advance
67. Processing a Travel Advance Request
68. Accepting and Scanning of a Prepaid Delivery Confirmation Article
69. NCR - POS ONE Sign-On and Sign-Off Procedures
70. NCR - POS ONE Procedures for Locking and Unlocking System
71. IBM - POS ONE Sign-On and Sign-Off Procedures
72. IBM - POS ONE Procedures for Locking and Unlocking System
73. IBM - POS ONE Close-Out Procedures
74. IBM/NCR - POS ONE Processing a Meter Refund
75. POS ONE/ IRT Processing a Refund Using PS Form 3533
76. IRT - MOS Close-Out Procedures
77. IRT Processing of a Meter Refund
78. IRT or POS ONE Voiding and Refunding a Debit Card Transaction
79. IRT or POS ONE, or Manual Processing a Travel Request
80. IRT/PVI Boot-Up Procedures for Unisys Phase III/Clerk Start of Day
81. IRT or POS ONE Processing of a Self Service Equipment Refund

82. Phase III IRT Start-up Procedures
83. Manual Close-Out Daily PS Form 1412
84. TRANZ 380 Voiding a Credit Card Transaction
85. NCR – POS ONE Close-Out Procedures

Training Worksheet

Lesson #33

Task:

Selling and Accepting a Registered Mail COD Article

Terminal Objective: review with future Associate

How to Sell and Accept a Registered Mail COD article.

Prerequisites:

_____ Sales and Services Retail Training

_____ Review **GIST**

_____ Aviation Security

_____ HAZMAT training

Supplies and Equipment Needed for This Training Session:

_____ IRT/POS ONE System

_____ COD elliptical stamp

_____ PS Forms 3816

_____ Label 200

_____ PS Forms 3806

_____ Tag 44

_____ Round date stamp

_____ Rate Chart/Scale

_____ Samples for training

_____ Postage (training)

_____ Customer (role-play)

_____ pen/pencil

Note to all RCs teaching this session:

Training step that is specific to clarifying questions to be asked of customer must include pertinent information on any or all of the following:

- **HAZMAT**
 - **Aviation Security**
-

Training Worksheet

Task: Selling and Accepting a Registered Mail COD Article

_____ 1. RC will

Demonstrate professional greeting technique (**GIST**).

Future Associate will
Repeat demonstration.

_____ 2. RC will

Demonstrate how to ask clarifying questions to determine customer needs (**GIST**).

Future Associate will
Repeat demonstration.

_____ 3. RC will

Explain/demonstrate how to fill out correct forms and educate customer on accurate completion. Secure item with round date on seams.

Future Associate will
Repeat demonstration.

_____ 4. RC will

Explain/demonstrate how to complete USPS portion of forms , using registered number as COD number, calculation of postage, registered fee, then COD fees and affix to mail piece.

Future Associate will
Repeat demonstration.

_____ 5. RC will

Explain value sell techniques (**GIST**).

Future Associate will
Explain value sell.

_____ 6. RC will

Explain customer payment options and process payment (**GIST**).

Future Associate will
State customer payment options and process payment.

_____ 7. RC will

Demonstrate proper distribution of registered, COD, and cash receipt.

Future Associate will
Repeat demonstration.

Training Worksheet

Task: Selling and Accepting a Registered Mail COD Article

_____ 8. RC will

Explain closing professionally (**GIST**).

Future Associate will
Closing professionally.

_____ 9. RC will

Demonstrate securing registered item and explain responsibility.

Future Associate will
Secure registered item and state responsibility.

_____ 10. RC will

Future Associate will

How tested:

_____ Role Play

_____ Customer

Date: _____

Training Worksheet

Lesson #34

Task:

Selling and Accepting an Express Mail COD Article

Terminal Objective: review with future Associate

How to Sell and Accept Express Mail COD articles

Prerequisites:

_____ Sales and Services Associate Training

_____ Review **GIST**

_____ Aviation Security

_____ HAZMAT Training

_____ Knowledge of Domestic Mail Manual

_____ Postal Bulletin

Supplies and Equipment Needed for This Training Session:

_____ Appropriate forms (Express Mail and COD labels)

_____ Express Mail supplies

_____ Postage

_____ Customer (role play)

_____ Practice sample for training

_____ Elliptical stamp

_____ Express Mail Network printout

_____ Round date stamp

_____ Rate chart scale

_____ IRT/POS ONE System

_____ pen/pencil

Note to all RCs teaching this session:

Training step that is specific to clarifying questions to be asked of customer must include pertinent information on any or all of the following:

- **HAZMAT**
 - **Aviation Security**
-

Training Worksheet

Task: Selling and Accepting an Express Mail COD Article

_____ 1. RC will

Demonstrate professional greeting technique (**GIST**).

Future Associate will
Repeat demonstration.

_____ 2. RC will

Demonstrate how to ask clarifying questions to determine customer needs (**GIST**).

Future Associate will
Repeat demonstration.

_____ 3. RC will

Demonstrate explanation of express and COD services and how to complete forms.

Future Associate will
Repeat demonstration.

_____ 4. RC will

Demonstrate the completion of USPS portion of forms by calculating first the Express Mail charge using the Express Mail number as COD number and then COD charges and affix postage and fees. Use the retail equipment to complete transaction.

Future Associate will
Repeat demonstration.

_____ 5. RC will

Explain value sell techniques (**GIST**).

Future Associate will
Explain value sell.

_____ 6. RC will

Explain customer payment options and process payment. (**GIST**).

Future Associate will
State customer payment options and process payment.

_____ 7. RC will

Demonstrate separating receipts and giving customer copy.

Future Associate will
Repeat demonstration.

Training Worksheet

Task: Selling and Accepting an Express Mail COD Article

_____ 8. RC will

Explain closing professionally (**GIST**).

Future Associate will
Demonstrate professional closing.

_____ 9. RC will

Explain/demonstrate where to place article for dispatch.

Future Associate will
Repeat demonstration.

_____ 10. RC will

Future Associate will

How tested:

_____ Role Play

_____ Customer

Date: _____

Training Worksheet

Lesson #35

Task:

Procedures for Returning Express Mail

Terminal Objective: Review with future Associate
How to Return Express Mail in a Timely Manner.

Prerequisites:

- _____ Sales and Services Associate Training Course
 - _____ Knowledge of Domestic Mail Manual
 - _____ Knowledge of Postal Bulletin
-

Supplies and Equipment Needed for This Training Session:

- _____ Endorsement stamp _____ pen/pencil
 - _____ Express bag and proper label
 - _____ PS Form 3849
 - _____ Sample Express Mail pieces for training
 - _____ Duplicate Express label
-

Training Worksheet

Task: Procedures for Returning Express Mail

_____ 1. RC will

Demonstrate where express articles are stored in office. Review delivery label to verify return.

Future Associate will
Repeat demonstration

_____ 2. RC will

Demonstrate how to complete PS Form 3849 and file.

Future Associate will
Repeat demonstration

_____ 3. RC will

Demonstrate where to place endorsement on mail piece indicating reason for non-delivery.

Future Associate will
Repeat demonstration.

_____ 4. RC will

Review standard operating procedures for scanning mail piece or notifying local Express Mail office.

Future Associate will
Repeat demonstration.

_____ 5. RC will

Demonstrate how to prepare piece for dispatch.

Future Associate will
Repeat demonstration.

_____ 6. RC will

Demonstrate where to place mail for dispatch.

Future Associate will
Repeat demonstration.

_____ 7. RC will

Future Associate will

Training Worksheet

Task: Procedures for Returning Express Mail

_____ 8. RC will

Future Associate will

_____ 9. RC will

Future Associate will

_____ 10. RC will

Future Associate will

How tested: _____ Role Play _____ Customer

Date: _____

Training Worksheet

Lesson #36

Task:

Selling and Accepting Express Mail Military Service (EMMS)

Terminal Objective: review with future Associate

How to Sell and Accept Express Mail Military Service (EMMS)

Prerequisites:

- _____ Sales and Services Retail Training Program
 - _____ Review **GIST**
 - _____ Aviation Security
 - _____ HAZMAT training
-

Supplies and Equipment Needed for This Training Session:

- | | |
|------------------------------|----------------------------|
| _____ EMMS Network Directory | _____ EMMS stickers |
| _____ IRT/POS System | _____ Label |
| _____ Scale (manual offices) | _____ Envelope Samples |
| _____ Domestic Mail Manual | _____ Mail Piece Samples |
| _____ Postal Bulletin | _____ pen/pencil |
| _____ Customs forms 2976a, | _____ Customer (role-play) |
| _____ Customs forms 2976 | |
-

Note to all RCs teaching this session:

Training step that is specific to clarifying questions to be asked of customer must include pertinent information on any or all of the following:

- **HAZMAT**
 - **Aviation Security**
-

Training Worksheet

Task: Selling and Accepting Express Mail Military Service (EMMS)

_____ 1. RC will

Demonstrate professional greeting technique (**GIST**).

Future Associate will
Repeat demonstration.

_____ 2. RC will

Explain how to ask clarifying questions to determine customers needs (**GIST**).

Future Associate will
Ask clarifying questions to determine customers needs.

_____ 3. RC will

Explain how to use the Express Mail directory or follow prompts on retail equipment.

Future Associate will
State use of directory and prompts on retail equipment.

_____ 4. RC will

Explain Custom's Forms and Express Mail labels and how to complete each.

Future Associate will
State required forms and demonstrate how to complete each.

_____ 5. RC will

Explain proper procedures for, packaging, accepting, endorsing, and determining postage.

Future Associate will
State proper procedures for, packaging, accepting, endorsing, and determining postage.

_____ 6. RC will

Explain customer receipts.

Future Associate will
State use of customer receipts.

_____ 7. RC will

Explain value sell technique (**GIST**).

Future Associate will
Explain value sell techniques.

Training Worksheet

Task: Selling and Accepting Express Mail Military Service (EMMS)

_____ 8. RC will

Explain customer payment options and payment acceptance (**GIST**).

Future Associate will
State customer payments option and collect fees.

_____ 9. RC will

Explain closing professionally (**GIST**).

Future Associate will
Demonstrate professional closing.

_____ 10. RC will

Explain/demonstrate where to place item for dispatch.

Future Associate will
Repeat demonstration.

How tested:

_____ Role Play

_____ Customer

Date: _____

Training Worksheet

Lesson #37

Task:

Selling and Activating a Phone Card on the IRT

Terminal Objective: review with future Associate

How to Sell and Activate a Phone Card on the IRT

Prerequisites:

_____ Sales and Services Associate Training

Supplies and Equipment Needed for This Training Session:

_____ IRT

_____ Phone cards

_____ Verifone/Trans 380

_____ Customer (role play)

_____ Credit Card (training)

_____ Play Money (training)

_____ pen/pencil

Training Worksheet

Task: Selling and Activating a Phone Card on the IRT

_____ 1. RC will

Explain/demonstrate professional greeting technique (**GIST**).

Future Associate will
Repeat demonstration.

_____ 2. RC will

Explain/demonstrate how to ask clarifying questions to determine customer needs (**GIST**).

Future Associate will
Repeat demonstration

_____ 3. RC will

Explain/demonstrate how to enter a Phone Card Sale in AIC 099 on the IRT equipment.

Future Associate will
Enter phone card sale on retail equipment.

_____ 4. RC will

Explain/demonstrate how to activate a phone card using TRANS 380.

Future Associate will
Activate phone card on TRANS 380.

_____ 5. RC will

Explain/demonstrate value sell technique (**GIST**).

Future Associate will
Demonstrate value sell techniques.

_____ 6. RC will

Explain/demonstrate customer payment options and processes (**GIST**).

Future Associate will
State customer payment options and process payment.

_____ 7. RC will

Explain/demonstrate closing professionally (**GIST**).

Future Associate will
Demonstrate professional closing.

Training Worksheet

Task: Selling and Activating a Phone Card on the IRT

_____ 8. RC will

Future Associate will

_____ 9. RC will

Future Associate will

_____ 10. RC will

Future Associate will

How tested:

_____ Role Play

_____ Customer

Date: _____

Training Worksheet

Lesson #38

Task:

Selling and Activating a Phone Card on the IBM/NCR - POS ONE System

Terminal Objective: review with future Associate

How to Sell and Process a Phone Card on the IBM/NCR - POS ONE System

Prerequisites:

_____ Sales and Services Associate Training

Supplies and Equipment Needed for This Training Session:

_____ IBM/NCR - POS ONE

_____ Verifone/TRANZ 380

_____ Customer (role play)

_____ Phone cards (training)

_____ Credit Card (training)

_____ Play Money (training)

_____ pen/pencil

Training Worksheet

Task: Selling and Activating a Phone Card on IBM/NCR - POS ONE System

_____ 1. RC will

Explain/demonstrate professional greeting technique (**GIST**).

Future Associate will
Repeat demonstration.

_____ 2. RC will

Explain/demonstrate how to ask clarifying questions to determine customer needs (**GIST**).

Future Associate will
Repeat demonstration.

_____ 3. RC will

Explain/demonstrate what to touch on screen <customer visit> (IBM). NCR not applicable.

Future Associate will
Touch <customer visit>.

_____ 4. RC will

Explain/demonstrate how to scan phone card.

Future Associate will
Scan phone card.

_____ 5. RC will

Explain/demonstrate how to activate the card.

Future Associate will
Activate the card.

_____ 6. RC will

Explain/demonstrate value sell technique (**GIST**).

Future Associate will
Demonstrate value sell technique.

_____ 7. RC will

Explain/demonstrate customer payment options and processes (**GIST**).

Future Associate will
State payment options and process.

Training Worksheet

Task: Selling and Activating a Phone Card on the IBM/NCR - POS ONE System

_____ 8. RC will

Explain/demonstrate closing professionally (**GIST**).

Future Associate will
Demonstrate professional closing.

_____ 9. RC will

Future Associate will

_____ 10. RC will

Future Associate will

How tested: _____ Role Play _____ Customer

Date: _____

Training Worksheet

Lesson #39

Task:

Selling and Activating Liberty Cash Cards on the IRT

Terminal Objective: review with future Associate

How to Sell and Process Liberty Cash Cards on the IRT

Prerequisites:

_____ Sales and Services Associate Training

Supplies and Equipment Needed for This Training Session:

_____ IRT

_____ TRANZ 380

_____ Liberty Cash Card (training)

_____ Customer (role play)

_____ Credit Card (training)

_____ Play Money (training)

_____ pen/pencil

Training Worksheet

Task: Selling and Activating Liberty Cash Cards on the IRT

_____ 1. RC will

Explain/demonstrate professional greeting technique (**GIST**).

Future Associate will
Repeat demonstration.

_____ 2. RC will

Explain/demonstrate how to ask clarifying questions to determine customer needs (**GIST**).

Future Associate will
Repeat demonstration.

_____ 3. RC will

Explain/demonstrate which key to enter on IRT (AIC).

Future Associate will
Demonstrate entering the amount on IRT.

_____ 4. RC will

Explain/demonstrate value sell techniques (**GIST**).

Future Associate will
Explain value sell

_____ 5. RC will

Explain/demonstrate customer payment options and processes (**GIST**).

Future Associate will
State customer payment options and process.

_____ 6. RC will

Explain/demonstrate activating a Liberty Cash Card.

Future Associate will
Activate Liberty Card.

_____ 7. RC will

Explain/demonstrate giving customer receipt and explaining why customer should keep for records (specify expiration time).

Future Associate will
Give customer receipt and state to customer information about liberty service.

Training Worksheet

Task: Selling and Activating Liberty Cash Cards on the IRT

_____ 8. RC will

Explain/demonstrate closing professionally (**GIST**).

Future Associate will
Demonstrate professional closing.

_____ 9. RC will

Future Associate will

_____ 10. RC will

Future Associate will

How tested:

_____ Role Play

_____ Customer

Date: _____

Training Worksheet

Lesson #40

Task:

Selling and Activating Liberty Cash Cards on the IBM/NCR - POS ONE System

Terminal Objective: review with future Associate

How to Sell and Activate a Liberty Cash Card on the IBM/NCR - POS ONE System

Prerequisites:

_____ Sales and Services Associate Training

Supplies and Equipment Needed for This Training Session:

_____ IBM/NCR POS ONE system

_____ Credit Card (training)

_____ TRANZ 380

_____ IBM/NCR Quick Reference

_____ Liberty Cash Card (training)

Guide

_____ Customer (role play)

Training Worksheet

Task: Selling and Activating Liberty Cash Cards on IBM/NCR - POS ONE System

_____ 1. RC will

Explain/demonstrate professional greeting technique (**GIST**).

Future Associate will
Repeat demonstration.

_____ 2. RC will

Explain/demonstrate how to ask clarifying questions to determine customers needs (**GIST**).

Future Associate will
Repeat demonstration.

_____ 3. RC will

Explain/demonstrate for IBM by touching <visit> on screen. NCR is not applicable.

Future Associate will
Touch customer <visit> on screen.

_____ 4. RC will

Explain/demonstrate for IBM by touching <sales> on screen. NCR is not applicable.

Future Associate will
Touch <sales>.

_____ 5. RC will

Explain/demonstrate for IBM by touching <liberty cash> on screen. NCR – Enter Item # and press Sell By Item #.

Future Associate will
Touch <liberty cash>.

_____ 6. RC will

Explain/demonstrate for IBM by touching the amount of the purchase and then <done> on screen. NCR – Edit-Enter Amount.

Future Associate will
Enter amount of purchase and then <done>.

_____ 7. RC will

Explain to customer the liberty card does have an expiration date time to be used (**GIST**)

Future Associate will
State what customer needs to know about the expiration date of cash card

Training Worksheet

Task: Selling and Activating Liberty Cash Cards on the IBM/NCR - POS ONE System

_____ 8. RC will

Explain/demonstrate value sell techniques. Suggest payment options and process payment (no personal checks) (**GIST**).

Future Associate will
Value sell, suggest payment options and process.

_____ 9. RC will

Explain/demonstrate how to activate the liberty card.

Future Associate will
Activate the liberty card.

_____ 10. RC will

Explain/demonstrate closing professionally (**GIST**).

Future Associate will
Demonstrate professional closing.

How tested: _____ Role Play _____ Customer

Date: _____

Training Worksheet

Lesson #41

Task:

Purchasing Postal Products and Services with a Liberty Cash Card

Terminal Objective: review with future Associate

How to Process a Customer Purchase with a Liberty Cash Card

Prerequisites:

_____ Sales and Services Associate Training

_____ Refer to Debit/Credit Card Worksheet #21

Supplies and Equipment Needed for This Training Session:

_____ Customer (role play)

_____ Training supplies

_____ Local equipment, including TRANZ 380

_____ pen/pencil

Training Worksheet

Task: Purchasing Postal Products and Services with a Liberty Cash Card

_____ 1. RC will

Explain/demonstrate payment options, including Liberty cash (**GIST**).

Future Associate will
Repeat demonstration.

_____ 2. RC will

Explain/demonstrate how to process the sale on the retail equipment.

Future Associate will
Repeat demonstration.

_____ 3. RC will

Explain/demonstrate how to use the TRANZ 380 to process.

Future Associate will
Repeat demonstration.

_____ 4. RC will

Explain/demonstrate giving customer copies. **Note: remind customer of expiration date.**

Future Associate will
Repeat demonstration.

_____ 5. RC will

Explain/demonstrate closing professionally (**GIST**).

Future Associate will
Demonstrate professional closing.

_____ 6. RC will

Future Associate will

_____ 7. RC will

Future Associate will

Training Worksheet

Task: Purchasing Postal Products and Services with a Liberty Cash Card

_____ 8. RC will

Future Associate will

_____ 9. RC will

Future Associate will

_____ 10. RC will

Future Associate will

How tested:

_____ Role Play

_____ Customer

Date: _____

Training Worksheet

Lesson #42

Task:

Selling and Accepting Dinero Seguro/Sure Money

Terminal Objective: review with future Associate

How to Sell and Accept a Dinero Seguro/Sure Money Transaction

Prerequisites:

_____ Sales and Services Associate Training

Supplies and Equipment Needed for This Training Session:

_____ IRT/POS ONE System

_____ Personal Computer

_____ Phone Card

_____ Dinero Seguro laminated training card

_____ PS Form 5006, 5007, 5008, 5009, 8105B

_____ Translator chart

_____ Dinero Seguro/Sure Money

_____ Brochure

_____ pen/pencil

Training Worksheet

Task: Selling and Accepting Dinero Seguro/Sure Money

_____ 1. RC will

Explain/demonstrate professional greeting technique (**GIST**).

Future Associate will
Repeat demonstration.

_____ 2. RC will

Explain how to ask clarifying questions to determine customer needs. Explain benefits and features, use translation chart, if applicable (**GIST**).

Future Associate will
Ask clarifying questions to determine customer needs, explaining benefits and features, use translation chart.

_____ 3. RC will

Demonstrate how to use personal computer to begin transaction, generate name inquiry (repeat customer), refunds, change the name of recipient, or cancel a transaction.

Future Associate will
Repeat demonstration.

_____ 4. RC will

Demonstrate how to print receipts and confirm transaction from computer.

Future Associate will
Repeat demonstration.

_____ 5. RC will

Explain/demonstrate where customer signs and issues phone card.

Future Associate will
Repeat demonstration.

_____ 6. RC will

Demonstrate processing on retail equipment.

Future Associate will
Repeat demonstration.

_____ 7. RC will

Explain value sell techniques (**GIST**).

Future Associate will
Explain value sell.

Training Worksheet

Task: Selling and Accepting Dinero Seguro/Sure Money

_____ 8. RC will

Explain customer payment options and process payment (**GIST**).

Future Associate will
State customer payment options and process payment.

_____ 9. RC will

Explain closing professionally (**GIST**).

Future Associate will
Demonstrate professional closing.

_____ 10. RC will

Explain how to investigate claim handling and properly filing forms.

Future Associate will
Repeat demonstration.

How tested:

_____ Role Play

_____ Customer

Date: _____

Training Worksheet

Lesson #43

Task Name:
Selling and Processing Global Priority Mail

Terminal Objective: review with future Associate
How to Sell and Process Global Priority Mail

Prerequisites:

_____ Sales and Services Associate Training
_____ Knowledge of International Mail Manual
_____ Knowledge of Postal Bulletins
_____ Review **GIST**
_____ Aviation Security
_____ HAZMAT

Supplies and Equipment Needed for This Training Session:

_____ IRT/POS ONE System
_____ International Mail Manual
_____ GPM mailing supplies
_____ Custom forms
_____ Customer (role play)

_____ Postal Bulletins
_____ pen/pencil

Note to all RCs teaching this session:

Training step that is specific to clarifying questions to be asked of customer must include pertinent information on any or all of the following:

- **HAZMAT**
 - **Aviation Security**
-

Training Worksheet

Task: Selling and Processing Global Priority Mail

_____ 1. RC will

Demonstrate a professional greeting technique, then explain how to determine the availability of an GPM item using the International Mail Manual, Postal Bulletins, and the IRT/POS ONE (GIST).

Future Associate will
Repeat demonstration.

_____ 2. RC will

Show examples of the different sizes of GPM packaging materials and explain their use. Addressee block with destination country must be in English. Explain offering another service if global is not available. (GIST).

Future Associate will
State the proper packaging that the customer will need for their item. Review address block to verify destination country is in English.

_____ 3. RC will

Demonstrate procedure on retail equipment.

Future Associate will
Repeat demonstration.

_____ 4. RC will

Review IMM section on GPM procedures for completing custom labels. Questions concerning aviation security? (GIST).

Future Associate will
Demonstrate proper procedures for using custom forms. State aviation security program to customer.

_____ 5. RC will

Demonstrate proper placement of PVI, meter strip, or postage stamps and explain value sell techniques (GIST).

Future Associate will
Attach proper PVI, meter strip or postage stamps and value sell.

Training Worksheet

Task: Selling and Processing Global Priority Mail

_____ 6. RC will
Explain customer payment options and process payment if customer purchase additional product or service (**GIST**).

Future Associate will
State customer payment options and process payment.

_____ 7. RC will
Explain closing professionally (**GIST**).

Future Associate will Demonstrate professional closing.

_____ 8. RC will
Demonstrate where to place Global Priority Mail item for dispatch.

Future Associate will
Repeat demonstration.

_____ 9. RC will.

Future Associate will

_____ 10. RC will

Future Associate will

How tested: _____ Role Play _____ Customer

Date: _____

Training Worksheet

Lesson #44

Task:

Selling and Accepting Priority Mail Global Guaranteed

Terminal Objective: review with future Associate

How to Sell and Accept Priority Mail Global Guarantee

Prerequisites:

_____ Sales and Services Retail Training Program

_____ Review **GIST**

_____ Aviation Security Training

_____ HAZMAT Training

_____ Knowledge of the Domestic Mail Manual

_____ Knowledge of Postal Bulletin

Supplies and Equipment Needed for This Training Session:

_____ PMGG Sticker (1074RGG3X)

_____ pen/pencil

_____ PMGG Envelop (EP-14FGG2X)

_____ PMGG Label (11FGG1X)

_____ PMGG Bag Tag (Tag PMGG4X)

_____ PMGG Service Guide (no #)

_____ IRT/POS ONE System

NOTE to all RC's teaching this session:

Training step that is specific to clarifying questions to be asked of customer must include pertinent information on any or all of the following:

- **HAZMAT**
 - **Aviation Security**
-

Training Worksheet

Task: Selling and Accepting Priority Mail Global Guaranteed

_____ 1. RC will

Demonstrate professional greeting technique (**GIST**)

Future Associate will
Repeat demonstration.

_____ 2. RC will

Demonstrate how to ask clarifying questions to determine customers needs (**GIST**)

Future Associate will
Repeat demonstration

_____ 3. RC will

Demonstrate processing PMGG IRT/POS ONE system

Future Associate will
Repeat demonstration

_____ 4. RC will:

Demonstrate referring to PMGG Service Guide for eligibility, guarantee and cost.

Future Associate will:
Repeat Demonstration

_____ 5. RC will:

Demonstrate proper packaging that must be used (i.e. envelope or label)

Future Associate will:
Repeat demonstration

_____ 6. RC will:

Demonstrate the proper way to complete form and checking customers label for accuracy.

Future Associate will:
Repeat demonstration

_____ 7. RC will:

Demonstrate completing postal portion of form and retaining the USPS Copy.

Future Associate will:
Repeat demonstration

Training Worksheet

Task: Selling and Accepting Priority Mail Global Guaranteed

_____ 8. RC will:
Demonstrate applying proper postage and stickers (if needed).

Future Associate will:
Repeat demonstration

_____ 9. RC will:
Demonstrate correct dispatch procedures in designated office. (Properly identify express pouch with PMGG label)

Future Associate will:
Repeat demonstration

_____ 10. RC will
Explain closing professionally (**GIST**) Include letting customer know about additional supplies

Future Associate will
Demonstrate professional closing

How tested: _____ Role Play _____ Customer

Date: _____

Training Worksheet

Lesson #45

Task:

Exchanging of Registered Mail Between Employees

Terminal Objective: review with future Associate

How to Exchange Registered Mail Between Employees

Prerequisites:

_____ Sales and Services Associate Training

_____ Knowledge of the Postal Operations Manual

_____ Knowledge of the and Domestic Mail Manual

Supplies and Equipment Needed for This Training Session:

_____ Carbon paper

_____ PS Forms 3854

_____ PS Forms 3830

_____ Tag 44

_____ COD Elliptical stamp

_____ Article of Registered Mail (training)

_____ Domestic Mail Manual

_____ International Mail Manual

_____ DM 901

_____ Round date stamp

_____ pen/pencil

Training Worksheet

Task: Exchanging of Registered Mail Between Employees

_____ 1. RC will

Demonstrate how to verify package condition.

Future Associate will
Check condition of article, explaining what to review.

_____ 2. RC will

Explain how to verify article number with the necessary paperwork. Explain accountability of item.

Future Associate will
Verify article information against paperwork and explain item security.

_____ 3. RC will

Demonstrate where to sign and date the paperwork with round date on seams.

Future Associate will
Repeat demonstration.

_____ 4. RC will

Demonstrate where to record article number in dispatch book and how to close out form if necessary.

Future Associate will
Repeat demonstration.

_____ 5. RC will

Explain where to secure article and explain item must be kept secure until dispatch.

Future Associate will
Demonstrate where to secure article and state responsibility of maintaining security until dispatch.

_____ 6. RC will

Future Associate will

_____ 7. RC will

Future Associate will

Training Worksheet

Task: Exchanging of Registered Mail Between Employees

_____ 8. RC will

Future Associate will

_____ 9. RC will

Future Associate will

_____ 10. RC will

Future Associate will

How tested:

_____ Role Play

_____ Customer

Date: _____

Training Worksheet

Lesson #46

Task:

Selling and Accepting ISAL, IPA, and Value Post to Canada

Terminal Objective: review with future Associate

How to Sell and Accept ISAL, IPA, and Value Post to Canada

Prerequisites:

_____ Sales and Services Associate Training

_____ Review **GIST**

_____ Aviation Security

_____ HAZMAT Training

Supplies and Equipment Needed for This Training Session:

_____ International Mail Manual _____ pen/pencil

_____ Domestic Mail Manual

_____ Mailing forms and labels

_____ Tag 44

_____ Customer (role play) and samples for training

Note to all RCs teaching this session:

Training step that is specific to clarifying questions to be asked of customer must include pertinent information on any or all of the following:

- **HAZMAT**
 - **Aviation Security**
-

Training Worksheet

Task: Selling and Accepting ISAL, IPA, and Value Post to Canada

_____ 1. RC will

Demonstrate professional greeting technique (**GIST**).

Future Associate will
Repeat demonstration.

_____ 2. RC will

Demonstrate how to ask clarifying questions to determine customer needs (**GIST**).

Future Associate will
Repeat demonstration.

_____ 3. RC will

Review sections of International Mail Manual related to ISAL, IPA, and Value Post to Canada.

Future Associate will
Demonstrate reviewing sections of IMM on ISAL, IPA, and Value Post to Canada.

_____ 4. RC will

Explain qualification of ISAL, IPA, and Value Post to Canada, as shown in International Mail Manual and retail equipment.

Future Associate will
State understanding qualifications for ISAL, IPA, and Value Post to Canada.

_____ 5. RC will

Explain how to determine fees using International Mail Manual and retail equipment.

Future Associate will
State how to determine fees.

_____ 6. RC will

Demonstrate proper labeling and customer forms completion.

Future Associate will
Repeat demonstration.

_____ 7. RC will

Explain value sell technique (**GIST**).

Future Associate will
Explain value sell technique.

Training Worksheet

Task: Selling and Accepting ISAL, IPA, and Value Post to Canada

_____ 8. RC will

Explain customer payment options and process payment (**GIST**).

Future Associate will
State customer payment options and process payment.

_____ 9. RC will

Explain offering additional services and supplies to customers (**GIST**).

Future Associate will
State offering additional services and supplies to customers.

_____ 10. RC will

Explain closing professionally (**GIST**).

Future Associate will
Demonstrate professional closing.

How tested:

_____ Role Play

_____ Customer

Date: _____

Training Worksheet

Lesson #47

Task:

Selling and Accepting International Express Mail

Terminal Objective: review with future Associate

How to Sell and Accept International Express Mail

Prerequisites:

_____ Sales and Services Associate Training

_____ Review **GIST**

_____ Aviation Security Training

_____ HAZMAT Training

Supplies and Equipment Needed for This Training Session:

_____ IRT /POS

_____ PVI

_____ PS Label 11B

_____ Rate Chart, 2865

_____ PS Form 2976E

_____ International Mail Manual

_____ PS Form 2976

_____ Postal Bulletin updates

_____ PS Form 2976A

_____ pen/pencil

_____ Postage

_____ Customer (role play) and samples for training

Note to all RC's teaching this session:

Training step that is specific to clarifying questions to be asked of customer must include pertinent information on any or all of the following:

- **HAZMAT**
 - **Aviation Security**
-

Training Worksheet

Task: Selling and Accepting International Express Mail

_____ 1. RC will

Demonstrate professional greeting technique (**GIST**).

Future Associate will
Repeat demonstration.

_____ 2. RC will

Demonstrate how to ask clarifying questions to determine customers needs (**GIST**).

Future Associate will
Repeat demonstration.

_____ 3. RC will

Demonstrate how to determine availability of service and educate customer as to service guarantees. *I.e. check IMM. **NOTE:** return receipt is free for certain countries on international mail (**GIST**).*

Future Associate will
Repeat demonstration.

_____ 4. RC will

Demonstrate how to assist customer in filling out forms i.e. appropriate customs forms, destination in English on last line.

Future Associate will
Repeat demonstration.

_____ 5. RC will

Demonstrate how to verify accuracy of forms and how to fill out USPS portion. *I.e. check IRT/POS or IMM for country codes.*

Future Associate will
Repeat demonstration.

_____ 6. RC will

Demonstrate how to affix appropriate labels and forms to the article.

Future Associate will
Repeat demonstration.

_____ 7. RC will

Explain value sell technique (**GIST**).

Future Associate will explain value sell.

Training Worksheet

Task: Selling and Accepting International Express Mail.

_____ 8. RC will

Explain customer payment options and process payment (**GIST**).

Future Associate will
State customer payment options and process payment.

_____ 9. RC will

Explain closing professionally (**GIST**).

Future Associate will
Demonstrate professional closing.

_____ 10. RC will

Explain/demonstrate where to place article for dispatch.

Future Associate will
Repeat demonstration.

How tested:

_____ Role Play

_____ Customer

Date: _____

Training Worksheet

Lesson #48

Task:

Selling and Accepting International M-Bags

Terminal Objective: review with future Associate

How to Sell and Accept International M-Bags

Prerequisites:

_____ Sales and Services Associate Training

_____ Review **GIST**

_____ Aviation Security Training

_____ HAZMAT Training

Supplies and Equipment Needed for This Training Session:

_____ International Mail Manual

_____ IRT/POS ONE System

_____ #1 Sack

_____ Round date stamp

_____ Tag 158

_____ Custom Form 2976

_____ Customer (role play) and samples for training

Note to all RC's teaching this session:

Training step that is specific to clarifying questions to be asked of customer must include pertinent information on any or all of the following:

- **HAZMAT**
 - **Aviation Security**
-

Training Worksheet

Task: Selling and Accepting International M-Bags

_____ 1. RC will

Demonstrate a professional greeting techniques (**GIST**).

Future Associate will
Repeat demonstration.

_____ 2. RC will

Explain M-bag service requirements using the International Mail Manual or retail equipment (**GIST**).

Future Associate will
State M-bag requirements.

_____ 3. RC will

Explain weight requirements using the IMM or retail equipment (**GIST**).

Future Associate will
State weight requirements knowledge.

_____ 4. RC will

Explain package and marking requirements (**GIST**).

Future Associate will
State package and marking requirements.

_____ 5. RC will

Demonstrate how to complete tag 158 and Customs Form 2976.

Future Associate will
Repeat demonstration.

_____ 6. RC will

Demonstrate retrieving sack for shipping and attaching forms to the bag.

Future Associate will
Repeat demonstration.

_____ 7. RC will

Demonstrate weighing package(s) and placement of postage.

Future Associate will
Repeat demonstration.

Training Worksheet

Task: Selling and Accepting International M-Bags

_____ 8. RC will

Explain value sell technique (GIST).

Future Associate will
Explain value sell.

_____ 9. RC will

Explain customer payment options and process payment (GIST).

Future Associate will
State customer payment options and process.

_____ 10. RC will

Explain closing professionally (GIST).

Future Associate will
Demonstrate professional closing.

How tested:

_____ Role Play

_____ Customer

Date: _____

Training Worksheet

Lesson #49

Task:

Selling and Accepting International Special Delivery

Terminal Objective: review with future Associate

How to Sell and Accept International Special Delivery

Prerequisites:

_____ Sales and Services Associate Training

_____ Review **GIST**

_____ Aviation Security Training

_____ HAZMAT Training

Supplies and Equipment Needed for This Training Session:

_____ IRT/POS ONE System

_____ PVI/meter strip

_____ PS Forms 2976

_____ PS Forms 2976A

_____ PS Forms 2976E

_____ Label 19a and 19b

_____ Customer (role play)

_____ Special Delivery tags/X Stampers

_____ International Rate chart

_____ Label Par Avion

_____ International Mail Manual

_____ Label 57 (Special Delivery Label)

Note to all RC's teaching this session:

Training step that is specific to clarifying questions to be asked of customer must include pertinent information on any or all of the following:

- **HAZMAT**
 - **Aviation Security**
-

Training Worksheet

Task: Selling and Accepting International Special Delivery

_____ 1. RC will

Demonstrate how to check for availability using IRT/POS ONE prompts, or International Mail Manual.

Future Associate will
Repeat demonstration.

_____ 2. RC will

Explain how to determine appropriate fees, if applicable.

Future Associate will
Identify appropriate fees.

_____ 3. RC will

Demonstrate how to help customer fill out customs form, if required; i.e. PS Form 2976 and 2976A and affix Label 57.

Future Associate will
Repeat demonstration.

_____ 4. RC will

Demonstrate how to use retail equipment to determine rates and fees. **Note:** *special Delivery is dispatched with ordinary mail.*

Future Associate will
Repeat demonstration.

_____ 5. RC will

Explain value sell technique (**GIST**).

Future Associate will
Explain value sell.

_____ 6. RC will

Explain customer payment options and process payment (**GIST**).

Future Associate will
State customer payment options and process payment.

_____ 7. RC will

Explain closing professionally (**GIST**).

Future Associate will demonstrate professional closing.

Training Worksheet

Task: Selling and Accepting International Special Delivery

_____ 8. RC will
Explain/demonstrate where to place article for dispatch.

Future Associate will
Repeat demonstration.

_____ 9. RC will

Future Associate will

_____ 10. RC will

Future Associate will

How tested: _____ Role Play _____ Customer

Date: _____

Training Worksheet

Lesson #50

Task:

Selling and Accepting International Recorded Delivery

Terminal Objective: review with future Associate

How to Sell and Accept International Recorded Delivery.

Prerequisites:

_____ Sales and Services Associate Training Course

_____ Review **GIST**

_____ Aviation Security

_____ HAZMAT Training

Supplies and Equipment Needed for This Training Session:

_____ Postal Bulletin

_____ pen/pencil

_____ International Mail Manual

_____ Round Date Stamp

_____ PS Form 8099

_____ PS Form 2865

_____ IRT/POS ONE System

_____ Customer (role play)

Training Worksheet

Task: Selling and Accepting International Recorded Delivery.

_____ 1. RC will

Demonstrate professional greeting technique (**GIST**).

Future Associate will
Repeat demonstration.

_____ 2. RC will

Demonstrate how to ask clarifying questions to determine customer needs (**GIST**).

Future Associate will
Repeat demonstration.

_____ 3. RC will

Demonstrate how to check the IMM or Postal Bulletin for countries and use equipment for service available for letter, letter pkg., printed matter, small packet, matter for blind, and M-bags.

Future Associate will
Repeat demonstration.

_____ 4. RC will

Explain that ONLY customer completes PS Form 8099 and affixes to article. (**GIST**).

Future Associate will
State that only customer completes PS Form 8099 and affixes to article.

_____ 5. RC will

Explain how to verify customer completion of form.

Future Associate will
Identify proper completion of form.

_____ 6. RC will

Demonstrate how to fill in fee, apply postage, postmark receipt, and return customer portion of PS Form 8099.

Future Associate will
Repeat demonstration.

_____ 7. RC will

Explain value sell technique (**GIST**).

Future Associate will
Explain value sell.

Training Worksheet

Task: Selling and Accepting International Recorded Delivery

_____ 8. RC will

Explain customer payment options and process payment (**GIST**).

Future Associate will
State customer payment options and process payment.

_____ 9. RC will

Explain closing professionally (**GIST**).

Future Associate will
Demonstrate professional closing

_____ 10. RC will

Future Associate will

How tested: _____ Role Play _____ Customer

Date: _____

Training Worksheet

Lesson #51

Task:

Delivering Customs Duty Mail

Terminal Objective: review with future Associate

How to Identify and Deliver Customs Duty Mail Using the IRT or POS ONE System

Prerequisites:

_____ Sales and Services Associate Training Course

Supplies and Equipment Needed for This Training Session:

_____ Customer (role play)
_____ Customs Duty samples for training
_____ IRT/POS ONE System
_____ International Mail Manual
_____ pen/pencil

Training Worksheet

Task: Delivering Customs Duty Mail

_____ 1. RC will

Demonstrate professional greeting technique (**GIST**).

Future Associate will
Repeat demonstration.

_____ 2. RC will

Explain how to identify custom duty mail and where to locate in unit.

Future Associate will
State how to identify and where to locate custom duty mail.

_____ 3. RC will

Explain/demonstrate printing a PVI label for current fee and how to attach it to the article. Review IMM on storage charges of item if over six days (Procedures for IRT or POS ONE equipment).

Future Associate will
Print PVI label and state storage charges of item if over six days, if applicable.

_____ 4. RC will

Show how to remove label CF 3419 from article and identify fee.

Future Associate will
Repeat demonstration.

_____ 5. RC will (**POS procedure may be different**)

Show where to locate custom collect key on IRT and enter all information through screen prompts.

Future Associate will
Repeat demonstration.

_____ 6. RC will

Show where clerk and customer sign and date original form CF 3419.

Future Associate will
Repeat demonstration.

_____ 7. RC will

Explain value sell technique (**GIST**).

Future Associate will
Explain value sell.

Training Worksheet

Task: Delivering Customs Duty Mail

_____ 8. RC will

Explain collecting fee and customer payment options and process payment (**GIST**).

Future Associate will
State customer payment options and process payment

_____ 9. RC will

Explain closing professionally and where to file receipt with daily paperwork (**GIST**).

Future Associate will
Demonstrate professional closing.

_____ 10. RC will

Future Associate will

How tested:

_____ Role Play

_____ Customer

Date: _____

Training Worksheet

Lesson #52

Task:
Selling International Money Orders

Terminal Objective: review with future Associate
How to Sell International Money Orders

Prerequisites:
_____ Sales and Services Associate Training
_____ Review **GIST**

Supplies and Equipment Needed for This Training Session:

- _____ Money Order Printer _____ pen/pencil
- _____ International Mail Manual
- _____ Postal Bulletin
- _____ International Money Order Forms (MP-1 and authorization to issue)
- _____ IRT /POS ONE System
- _____ Training Money Orders
- _____ Customer (role play)

Training Worksheet

Task: Selling International Money Orders

_____ 1. RC will

Demonstrate professional greeting technique (**GIST**).

Future Associate will
Repeat demonstration.

_____ 2. RC will

Demonstrate how to ask clarifying questions to determine customer needs (**GIST**).

Future Associate will
Repeat demonstration.

_____ 3. RC will

Explain customer limited payment options for money orders (**GIST**).

Future Associate will
State customer limited payment options.

_____ 4. RC will

Explain/demonstrate looking up availability in IMM, Postal Bulletin or retail equipment, then select the proper forms and process.

Future Associate will
Repeat demonstration.

_____ 5. RC will

Explain value sell techniques (**GIST**).

Future Associate will
Explain value sell.

_____ 6. RC will

Explain customer payment options and process payment (**GIST**).

Future Associate will
State customer payment options and process payment.

_____ 7. RC will

Explain closing professionally (**GIST**).

Future Associate will
Demonstrate professional closing.

Training Worksheet

Task: Selling International Money Orders

_____ 8. RC will

Future Associate will

_____ 9. RC will

Future Associate will

_____ 10. RC will

Future Associate will

How tested: _____ Role Play _____ Customer

Date: _____

Training Worksheet

Lesson #53

Task:

Cashing MP-1, International Money Order

Terminal Objective: review with future Associate

How to Cash MP-1, International Money Order

Prerequisites:

_____ Sales and Services Retail Training

_____ Review **GIST**

_____ Review Postal Bulletins

Supplies and Equipment Needed for This Training Session:

_____ Postal Bulletin _____ pen/pencil

_____ Cash

_____ Round date stamp

_____ Bank deposit stamp

_____ Customer (role play)

_____ IRT/POS ONE System

Training Worksheet

Task: Cashing a MP-1, International Money Order

_____ 1. RC will

Demonstrate professional greeting technique (**GIST**).

Future Associate will
Repeat demonstration.

_____ 2. RC will

Demonstrate how to ask clarifying questions to determine customer needs (**GIST**).

Future Associate will
Repeat demonstration.

_____ 3. RC will

Explain verifying cash available in clerk drawer, if not checking with another clerk.

Future Associate will
Verify cash is available for money order amount or checking with another clerk.

_____ 4. RC will

Demonstrate verifying customer identification (**GIST**).

Future Associate will
Repeat demonstration.

_____ 5. RC will

Demonstrate verifying money order against Postal Bulletin money order log, if appropriate.

Future Associate will
Repeat demonstration.

_____ 6. RC will

Explain customer signing money order, verify signature, enter identification number, and endorse for deposit.

Future Associate will
State how customer must sign money order, verify signature, enter identification number, and endorse for deposit.

_____ 7. RC will

Explain/demonstrate entering m/o into retail equipment prior to counting funds to customer.

Future Associate will
Repeat demonstration.

Training Worksheet

Task: Cashing MP-1, International Money Order

_____ 8. RC will

Explain value sell (**GIST**).

Future Associate will
Explain value sell.

_____ 9. RC will

Explain if customer makes purchase, explain customer payment options and process payment (**GIST**).

Future Associate will
Repeat explanation.

_____ 10. RC will

Explain closing professionally (**GIST**).

Future Associate will
Demonstrate professional closing.

How tested:

_____ Role Play

_____ Customer

Date: _____

Training Worksheet

Lesson #54

Task:

Securing and Accounting of International Money Orders

Terminal Objective: review with future Associate

How to Secure International Money Orders

Prerequisites:

_____ Sales and Services Associate Training Course

Supplies and Equipment Needed for This Training Session:

_____ International Money Orders _____ pen/pencil

_____ Log book

_____ PS Form 17

_____ Cash drawer

_____ IRT/POS ONE System

Training Worksheet

Task: Securing and Accounting of International Money Orders

_____ 1. RC will

Explain types of International Money Orders and how to order using PS Form 17 from designated employee.

Future Associate will
State types and uses of PS Form 17 to order International Money Orders.

_____ 2. RC will

Demonstrate how to verify sequence (count) and how to enter into the IRT.

Future Associate will
Repeat demonstration.

_____ 3. RC will

Explain local accounting procedures (logbook), input into equipment, if necessary.

Future Associate will
Verify and sign log.

_____ 4. RC will

Explain issuing money orders in sequence.

Future Associate will
State how to issue money orders in sequence.

_____ 5. RC will

Explain money orders should not be transferred between clerks except in an emergency and how to complete this process.

Future Associate will
State money orders should not be transferred between clerks except in emergency and explain process.

_____ 6. RC will

Demonstrate security measure at retail counter and end of tour.

Future Associate will
Repeat demonstration.

_____ 7. RC will

Future Associate will

Training Worksheet

Task: Securing and Accounting of International Money Orders

_____ 8. RC will

Future Associate will

_____ 9. RC will

Future Associate will

_____ 10. RC will

Future Associate will

How tested:

_____ Role Play

_____ Customer

Date: _____

Training Worksheet

Lesson #55

Task:

Processing an International Money Order Inquiry

Terminal Objective: review with future Associate

How to Process an International Money Order Inquiry.

Prerequisites:

_____ Sales and Services Associate Training

_____ Review **GIST**

Supplies and Equipment Needed for This Training Session:

_____ PS Form 6401

_____ Customers Money Order Receipt

_____ PS Form 6684

_____ International Mail Manual

_____ PVI/ postage

_____ Round date stamp

_____ IRT/POS ONE System

_____ Customer (role play)

_____ pen/pencil

Training Worksheet

Task: Processing an International Money Order Inquiry

_____ 1. RC will

Demonstrate professional greeting technique (**GIST**).

Future Associate will
Repeat demonstration.

_____ 2. RC will

Demonstrate how to ask clarifying questions to determine customers needs (**GIST**).

Future Associate will
Repeat demonstration.

_____ 3. RC will

Demonstrate how to verify customers original money order receipt (**GIST**).

Future Associate will
Repeat demonstration.

_____ 4. RC will

Explain how to inform the customer the cost of inquiry. Inform customer replacement will not be made before six months after date of issue. (Inquiry may be made at any time.) (**GIST**).

Future Associate will
State cost of inquiry and time restraints.

_____ 5. RC will

Demonstrate how to give proper form to customer and assist completing if necessary.

Future Associate will
Repeat demonstration.

_____ 6. RC will

Demonstrate how to verify information on appropriate form and explain importance of accuracy.

Future Associate will
Repeat demonstration.

_____ 7. RC will

Explain/demonstrate processing inquiry on retail equipment and affix fee.

Future Associate will repeat demonstration.

Training Worksheet

Task: Processing an International Money Order Inquiry

_____ 8. RC will

Explain value sell techniques. If customer makes purchase, explain customer payment options and process payment (**GIST**).

Future Associate will

Value sell. If customer makes purchase, state customer payment options and process payment.

_____ 9. RC will

Explain closing professionally (**GIST**).

Future Associate will

Demonstrate professional closing.

_____ 10. RC will

Future Associate will

How tested:

_____ Role Play

_____ Customer

Date: _____

Training Worksheet

Lesson #56

Task:

Processing a Post Office Box Caller Service Transaction

Terminal Objective: review with future Associate

How to Process a Post Office Box Caller Service Transaction

Prerequisites:

_____ Sales and Services Associate Training

_____ Review **GIST**

Supplies and Equipment Needed for This Training Session:

_____ Retail Equipment

_____ Local Caller Service numbers

_____ PS Forms 1093

_____ Ratefold chart

_____ PS Forms 3801

_____ Customer (role play)

_____ PS Forms 1091B

_____ PS Forms 1538

Training Worksheet

Task: Processing a Post Office Box Caller Service Transaction

_____ 1. RC will

Demonstrate professional greeting technique (**GIST**).

Future Associate will
Repeat demonstration.

_____ 2. RC will

Demonstrate how to ask clarifying questions to determine customer needs (**GIST**).

Future Associate will
Repeat demonstration.

_____ 3. RC will

Demonstrate proper completion of PS Form 1093 and PS Form 3801 if needed. Demonstrate obtaining Caller Service number for customer.

Future Associate will
Repeat demonstration.

_____ 4. RC will

Explain how to review completed PS forms 1093 and 3801 and educate customer on new address (**GIST**).

Future Associate will
Review completed forms for accuracy and state new address or mailing to customer.

_____ 5. RC will

Demonstrate completion of PS Form 1538.

Future Associate will
Repeat demonstration.

_____ 6. RC will

Demonstrate using equipment to process transaction.

Future Associate will
Repeat demonstration.

_____ 7. RC will

Explain value sell technique (**GIST**).

Future Associate will explain value sell.

Training Worksheet

Task: Processing a Post Office Box Caller Service Transaction

_____ 8. RC will

Explain customer payment options and process payment (**GIST**).

Future Associate will
State customer payment options and process payment.

_____ 9. RC will

Explain closing professionally (**GIST**).

Future Associate will
Demonstrate professional closing.

_____ 10 RC will

Future Associate will

How tested:

_____ Role Play

_____ Customer

Date: _____

Training Worksheet

Lesson #57

Task:
Processing Post Office Box Records

Terminal Objective: review with future Associate
How to Process Post Office Box Records

Prerequisites:
_____ Knowledge of Domestic Mail Manual
_____ Knowledge of Postal Operations Manual

Supplies and Equipment Needed for This Training Session:

_____ PS Forms 1091A	_____ Postal Operations Manual
_____ PS Forms 1093	_____ Local files
_____ PS Form 1538	_____ pen/pencil
_____ Notice 32	

Training Worksheet

Task: Processing Post Office Box Records

_____ 1. RC will

Demonstrate checking completeness of PS Forms 1091 and 1093. Use PS Form 1538 to record fees paid.

Future Associate will
Repeat demonstration.

_____ 2. RC will

Demonstrate separating PS Forms 1093.

Future Associate will
Repeat demonstration.

_____ 3. RC will

Demonstrate proper filing of PS Forms 1091 and 1093.

Future Associate will
Repeat demonstration.

_____ 4. RC will

Explain purpose of notice 32, how to complete and place in box.

Future Associate will
State purpose of notice 32, complete, place in box.

_____ 5. RC will

Future Associate will

_____ 6. RC will

Future Associate will

_____ 7. RC will

Future Associate will

Training Worksheet

Task: Processing Post Office Box Records

_____ 8. RC will

Future Associate will

_____ 9. RC will

Future Associate will

_____ 10. RC will

Future Associate will

How tested:

_____ Role Play

_____ Customer

Date: _____

Training Worksheet

Lesson #58

Task:

Procedures for Handling Overflow of Post Office Box Mail

Terminal Objective: review with future Associate

How to Handle Overflow Post Office Box Mail.

Prerequisites:

_____ Sales and Services Associate Training

_____ Knowledge of local Post Office Box filing system

Supplies and Equipment Needed for This Training Session:

_____ Postal Operations Manual _____ pen/pencil

_____ PS Forms 1532

_____ Clipboard

_____ Rubber bands

_____ Utility cart (*PSIN 1075*) or suitable equipment

Training Worksheet

Task: Procedures for Handling Overflow of Post Office Box Mail

_____ 1. RC will

Review POM section on requirements and explain which boxes are considered to have excess mail.

Future Associate will
Repeat demonstration.

_____ 2. RC will

Demonstrate the proper procedures for PS Form 1532 and removing mail from box and placing form into box.

Future Associate will
Repeat demonstration.

_____ 3. RC will

Demonstrate how to band excess box mail safely.

Future Associate will
Repeat demonstration.

_____ 4. RC will

Demonstrate and review the entire box section and complete forms and remove mail.

Future Associate will
Repeat demonstration.

_____ 5. RC will

Explain where excess box mail stored and how to file.

Future Associate will
Repeat where excess is stored and place all excess box mail in proper location.

_____ 6. RC will

Future Associate will

_____ 7. RC will

Future Associate will

Training Worksheet

Task: Procedures for Handling Overflow of Post Office Box Mail

_____ 8. RC will

Future Associate will

_____ 9. RC will

Future Associate will

_____ 10. RC will

Future Associate will

How tested:

_____ Role Play

_____ Customer

Date: _____

Training Worksheet

Lesson #59

Task:

Procedures for Post Office Box Flagging System

Terminal Objective: review with future Associate

How to a Flag Post Office Box

Prerequisites:

_____ Sales and Services Associate Training

Supplies and Equipment Needed for This Training Session:

_____ PS Form 3575

_____ pen/pencil

_____ PS Form 1564

_____ Colored dots or labels (as applicable)

_____ Postal Operations Manual

Training Worksheet

Task: Procedures for Post Office Box Flagging System

_____ 1. RC will

Explain PS Form 1564 and demonstrate proper completion using PS Form 3575.

Future Associate will

State use of PS Form 1564 and demonstrate proper completion of PS Form 3575.

_____ 2. RC will

Demonstrate proper use of dot or labels (as applicable).

Future Associate will

Repeat demonstration.

_____ 3. RC will

Future Associate will

_____ 4. RC will

Future Associate will

_____ 5. RC will

Future Associate will

_____ 6. RC will

Future Associate will

_____ 7. RC will

Future Associate will

Training Worksheet

Task: Procedures for Post Office Box Flagging System

_____ 8. RC will

Future Associate will

_____ 9. RC will

Future Associate will

_____ 10. RC will

Future Associate will

How tested:

_____ Role Play

_____ Customer

Date: _____

Training Worksheet

Lesson #60

Task:

Postage Meter Setting Procedures and Accompanying Accounting Receipt

Terminal Objective: review with future Associate

How to Set Postage Meters and the Accompanying Receipt

Prerequisites:

_____ Sales and Services Associate Training

Supplies and Equipment Needed for This Training Session:

_____ IRT/POS ONE System	_____ Meter Manufacturers Instructions
_____ PS Form 3602-A	_____ MATS instructions
_____ PS Form 3603	_____ pen/pencil
_____ Meter setting supplies (seals, crimps, and cutter)	
_____ Customer (role play), training meter	

Training Worksheet

Task: Postage Meter Setting Procedures and Accompanying Accounting Receipt

1. RC will

Demonstrate examining meter for tampering i.e. broken seal, damage to register viewing windows, break off screws, and verify meter serial number.

Future Associate will
Repeat demonstration.

2. RC will

Demonstrate locating customer meter button on IRT, if applicable. If manual complete PS Form 3603. If applicable use POS ONE.

Future Associate will
Repeat demonstration.

3. RC will

Explain filling out PS Form 3603 if manual operation or explain using IRT/POS prompts.

Future Associate will
Repeat demonstration.

4. RC will

Demonstrate setting meter (hands on) and will also demonstrate verifying information with customer and MATS.

Future Associate will
Repeat demonstration.

5. RC will

Demonstrate how to fill out PS Form 3602A.

Future Associate will
Repeat demonstration.

6. RC will

Demonstrate giving customer copy to customer and maintain clerk copy for end of day report.

Future Associate will
Repeat demonstration.

7. RC will

Future Associate will

Training Worksheet

Task: Postage Meter Setting Procedures and Accompanying Accounting Receipt

_____ 8. RC will

Future Associate will

_____ 9. RC will

Future Associate will

_____ 10. RC will

Future Associate will

How tested:

_____ Role Play

_____ Customer

Date: _____

Training Worksheet

Lesson #61

Task:
Examining a Postage Meter

Terminal Objective: review with future Associate
How to Examine a Postage Meter and Record the Data

Prerequisites:
_____ Sales and Services Associate Training

Supplies and Equipment Needed for This Training Session:

_____ Postage Meter	_____ USPS TALK line
_____ Notification letter	_____ IRT/POS ONE System
_____ Meter examination form	_____ Calculator
_____ Round date stamp	_____ pen/pencil
_____ PS Form 13	

Training Worksheet

Task: Examining a Postage Meter

1. RC will

Demonstrate acceptance of meter and examination of letter from customer.

Future Associate will

Repeat demonstration.

2. RC will

Demonstrate how to remove meter from case (if needed), where to plug cord, and where the on/off switch is located on meter.

Future Associate will

Repeat demonstration.

3. RC will

Demonstrate where to locate meter serial number and compare it to the number on customer letter. Verify old control number.

Future Associate will

Repeat demonstration.

4. RC will

Explain how to read the ascending and descending numbers on meter and record on PS Form 13. Verify numbers by calling USPS TALK line. Explain IRT/POS ONE input.

Future Associate will

Read and record ascending and descending numbers. State where to call in order to verify control totals.

5. RC will

Explain the purpose of the control number and how it is determined using DEC talk.

Future Associate will

Add the ascending and descending numbers together to determine control number and explain DEC talk procedure.

6. RC will

Demonstrate where to record control number and round date. Use logbook.

Future Associate will

Repeat demonstration.

7. RC will

Explain meter automated tracking system (MATS).

Future Associate will

State use of meter automated tracking system (MATS).

Training Worksheet

Task: Examining a Postage Meter

_____ 8. RC will

Explain need to forward all information to MATS clerk at District Accounting at least once per week.

Future Associate will
State need to send information weekly.

_____ 9. RC will

Future Associate will

_____ 10. RC will

Future Associate will

How tested:

_____ Role Play

_____ Customer

Date: _____

Training Worksheet

Lesson #62

Task:

Exchanging Stamp Stock from a Customer

Terminal Objective: review with future Associate
How to Exchange Stamp Stock from a Customer

Prerequisites:

_____ Sales and Services Associate Training

Supplies and Equipment Needed for This Training Session:

_____ Damaged Stamps	_____ pen/pencil
_____ Usable Stamps	_____ PS Form 3533
_____ Domestic Mail Manual	
_____ Customer Receipt	
_____ F-1 Post Office Accounting Procedures	

Training Worksheet

Task: Exchanging Stamp Stock from a Customer.

_____ 1. RC will:

Explain the circumstances under which damaged stamps are accepted (**GIST**).

Future Associate will:

State circumstances under which damaged stamps are accepted.

_____ 2. RC will:

Explain getting supervisor permission to exchange usable stamps.

Future Associate will:

Repeat demonstration.

_____ 3. RC will

Explain/demonstrate how to enter exchange on retail equipment.

Future Associate will

Repeat demonstration.

_____ 4. RC will

Future Associate will

_____ 5. RC will

Future Associate will

_____ 6. RC will

Future Associate will

_____ 7. RC will

Future Associate will

Training Worksheet

Task: Exchanging Stamp Stock from a Customer

_____ 8. RC will

Future Associate will

_____ 9. RC will

Future Associate will

_____ 10. RC will

Future Associate will

How tested:

_____ Role Play

_____ Customer

Date: _____

Training Worksheet

Lesson #63

Task:

Scanning of Express Mail Delivery Labels

Terminal Objective: review with future Associate

How to Scan Express Mail Delivery Labels

Prerequisites:

_____ Sales and Services Associate Training

_____ Knowledge of Express Mail

_____ Knowledge of scanning equipment and handbook

Supplies and Equipment Needed for This Training Session:

_____ Express Mail delivery labels

_____ Training copies of Express Mail delivery labels

_____ pen/pencil

Training Worksheet

Task: Scanning of Express Mail Delivery Labels

 1. RC will

Demonstrate where to retrieve Express Mail delivery labels.

Future Associate will

Repeat demonstration.

 2. RC will

Explain when and why Express Mail labels would be sorted by zip code. (Office may be multi-zip or hub unit).

Future Associate will

State when and why labels should be sorted.

 3. RC will

Using scanner, demonstrate how to scan article using proper event code.

Future Associate will

Repeat demonstration.

 4. RC will

Explain importance of verifying scanned information.

Future Associate will

State importance of verifying information.

 5. RC will

Explain how to review scan list for errors (if applicable), demonstrate how to make corrections.

Future Associate will

Review scanning list for errors and demonstrate how to make corrections on scan list and correct any pieces.

 6. RC will

Explain transmission procedures of scanning equipment-sending procedures.

Future Associate will

State transmission procedures of scanning sending procedures.

 7. RC will

Demonstrate where to place scanned labels.

Future Associate will

Repeat demonstration.

Training Worksheet

Task: Scanning of Express Mail Delivery Labels

_____ 8. RC will

Future Associate will

_____ 9. RC will

Future Associate will

_____ 10. RC will

Future Associate will

How tested: _____ Role Play _____ Customer

Date: _____

Training Worksheet

Lesson #64

Task Name:

Scanning of Incoming Express Mail in a Multi-ZIP or Hub Office

Terminal Objective: review with future Associate

Scan Incoming Express Mail in a Multi-ZIP or Hub Office

Prerequisites:

_____ Sales and Services Associate Training

_____ Working knowledge of scanning equipment

_____ Knowledge of Express Mail

Supplies and Equipment Needed for This Training Session:

_____ Scanning equipment & including handbook

_____ Sample Express Mail article for training

_____ pen/pencil

Training Worksheet

Task: Scanning of Incoming Express Mail in a Multi-ZIP or Hub Office

_____ 1. RC will
Demonstrate how to gather incoming express mail from suppliers.

Future Associate will
Repeat demonstration

_____ 2. RC will
Demonstrate how to segregate pieces by zip codes and scanner event code.

Future Associate will
Repeat demonstration

_____ 3. RC will
Explain initial scan procedures within 30 minutes of mail arrival in delivery unit.

Future Associate will
State scanning express pieces using scanning equipment and event codes within 30 minutes of arrival.

_____ 4. RC will
Demonstrate how to scan articles by priority sequence of delivery using scanner.

Future Associate will
Repeat demonstration.

_____ 5. RC will
Explain proper transfer of express pieces to designated employee.

Future Associate will
State where express pieces to designated employee are transferred.

_____ 6. RC will

Future Associate will

_____ 7. RC will

Future Associate will

Training Worksheet

Task: Scanning of Incoming Express Mail in a Multi-ZIP or Hub Office

_____ 8. RC will

Future Associate will

_____ 9. RC will

Future Associate will

_____ 10. RC will

Future Associate will

How tested:

_____ Role Play

_____ Customer

Date: _____

Training Worksheet

Lesson #65

Task:

Processing a PS Form 7381, Purchase of Supplies

Terminal Objective: review with future Associate

How to Process a PS Form 7381

Prerequisites:

_____ Sales and Services Associate Training

Supplies and Equipment Needed for This Training Session:

_____ PS Form 7381

_____ pen/pencil

_____ Money Orders

_____ Money Order Imprinter

_____ IRT/POS ONE system

_____ Vendor Invoice

Training Worksheet

Task: Processing a PS Form 7381, Purchase of Supplies

_____ 1. RC will:

Demonstrate reviewing PS Form #7381, invoice, for accuracy and completeness.

Future Associate will:
Repeat demonstration

_____ 2. RC will:

Demonstrate issuing a no fee Postal Money Order or Cash for payment.

Future Associate will:
Repeat demonstration

_____ 3. RC will:

Demonstrate entering the PS Form 7381 into the proper AIC on the IRT or the proper GLA on the POS ONE system

Future Associate will:
Repeat demonstration

_____ 4. RC will

Explain/demonstrate how to tender payment and local filing procedures

Future Associate will
Repeat demonstration

_____ 5. RC will

Future Associate will

_____ 6. RC will

Future Associate will

_____ 7. RC will

Future Associate will

Training Worksheet

Task: Processing a PS Form 7381, Purchase of Supplies

_____ 8. RC will

Future Associate will

_____ 9. RC will

Future Associate will

_____ 10. RC will

Future Associate will

How tested:

_____ Role Play

_____ Customer

Date: _____

Training Worksheet

Lesson #66

Task:
Processing an Emergency Salary Advance

Terminal Objective: review with future Associate
How to Process an Emergency Salary Advance

Prerequisites:
_____ Sales and Services Associate Training

Supplies and Equipment Needed for This Training Session:

_____ PS Form 1608	_____ pen/pencil
_____ IRT/POS ONE System	
_____ Domestic Money Order	
_____ Money Order Imprinter	
_____ F-1 Post Office Accounting Procedures	

Training Worksheet

Task: Processing an Emergency Salary Advance

_____ 1. RC will:

Demonstrate reviewing PS Form 1608 for completeness and for proper approving signatures.

Future Associate will:

Repeat demonstration.

_____ 2. RC will:

Demonstrate issuing a no fee money order for a salary advance.

Future Associate will:

Repeat demonstration

_____ 3. RC will:

Demonstrate entering the PS Form 1608 into the correct AIC on the IRT or entering it into the correct GLA on the POS ONE system

Future Associate will:

Repeat demonstration

_____ 4. RC will

Explain/demonstrate how to issue payment and file receipts

Future Associate will

Repeat demonstration

_____ 5. RC will

Future Associate will

_____ 6. RC will

Future Associate will

_____ 7. RC will

Future Associate will

Training Worksheet

Task: Processing an Emergency Salary Advance

_____ 8. RC will

Future Associate will

_____ 9. RC will

Future Associate will

_____ 10. RC will

Future Associate will

How tested:

_____ Role Play

_____ Customer

Date: _____

Training Worksheet

Lesson #67

Task:

Processing a Travel Advance Request

Terminal Objective: review with future Associate
How to Process a Travel Advance Request

Prerequisites:

_____ Sales and Services Associate Training

Supplies and Equipment Needed for This Training Session:

_____ PS Form 1011 (Travel Advance Request & Itinerary Schedule)

_____ IRT/POS ONE System

_____ pen/pencil

_____ Money Order (training)

_____ Money Order Imprinter

Training Worksheet

Task: Processing a Travel Advance Request

_____ 1. RC will:
Demonstrate reviewing PS Form 1011 for completeness and authorized signatures.

Future Associate will:
Repeat demonstration

_____ 2. RC will:
Demonstrate issuing a no fee money order or cash for the PS Form 1011.

Future Associate will:
Repeat demonstration

_____ 3. RC will:
Demonstrate entering the amount of the PS Form 1011 into the proper AIC on the IRT or the proper GLA on the POS ONE system

Future Associate will:
Repeat demonstration.

_____ 4. RC will

Future Associate will

_____ 5. RC will

Future Associate will

_____ 6. RC will

Future Associate will

_____ 7. RC will

Future Associate will

Training Worksheet

Task: Processing a Travel Advance Request

_____ 8. RC will

Future Associate will

_____ 9. RC will

Future Associate will

_____ 10. RC will

Future Associate will

How tested:

_____ Role Play

_____ Customer

Date: _____

Training Worksheet

Lesson #68

Task:

Accepting and Scanning of a Prepaid Delivery Confirmation Article

Terminal Objective: review with future Associate

How to Accept and Scan a Prepaid Delivery Confirmation Article

Prerequisites:

_____ Sales and Services Associate Training

_____ Knowledge of Domestic Mail Manual

_____ Review **GIST**

Supplies and Equipment Needed for This Training Session:

_____ IRT/POS ONE System

_____ Delivery Confirmation Scanner

_____ Customer (role play)

_____ Training Scan Sheet

_____ Round date stamp

_____ pen/pencil

_____ Rate fold

NOTE to all RC's teaching this session:

Training step that is specific to clarifying questions to be asked of customer must include pertinent information on any or all of the following:

- **HAZMAT**
- **Aviation Security**

Training Worksheet

Task: Accepting and Scanning of a Prepaid Delivery Confirmation Article

_____ 1. RC will

Demonstrate professional greeting technique (**GIST**)

Future Associate will
Repeat demonstration

_____ 2. RC will

Explain how to ask clarifying questions to determine customer needs (**GIST**)

Future Associate will
Ask clarifying questions to determine customer needs

_____ 3. RC will

Explain/demonstrate how to verify postage

Future Associate will
Repeat demonstration

_____ 4. RC will

Explain/demonstrate proper scanning procedures

Future Associate will
Repeat demonstration

_____ 5. RC will

Explain value sell techniques (**GIST**)

Future Associate will
Demonstrate Value sell

_____ 6. RC will

Explain customer payment options and process payment (**GIST**)

Future Associate will
State customer payment options and process payment

_____ 7. RC will

Explain closing professionally (**GIST**)

Future Associate will
Demonstrate professional closing

Training Worksheet

Task: Accepting and Scanning of a Prepaid Delivery Confirmation Article

_____ 8. RC will

Future Associate will

_____ 9. RC will

Future Associate will

_____ 10. RC will

Future Associate will

How tested:

_____ Role Play

_____ Customer

Date: _____

Training Worksheet

Lesson #69

Task:

NCR - POS Sign-On and Sign-Off Procedures

Terminal Objective: review with future Associate

How to Sign-on and Sign-off of the NCR – POS System

Prerequisites:

_____ Sales and Services Associate Training

Supplies and Equipment Needed for This Training Session:

_____ NCR - POS ONE Equipment

_____ A processed PS Form 1357

_____ POS ONE - NCR Quick Reference Guide

Training Worksheet

Task: NCR -POS Sign-On and Sign-Off Procedures

_____ 1. RC will

Explain/demonstrate how to enter clerk ID on number pad. Explain case sensitivity caps lock. Explain three (3) chances before lock out.

Future Associate will

Enter clerk ID on number pad. State issues.

_____ 2. RC will

Explain/demonstrate how to enter password on number pad (small case).

Future Associate will

Enter password (small case).

_____ 3. RC will

Explain/demonstrate how to sign off system.

Future Associate will

Sign off system.

_____ 4. RC will

Explain/demonstrated how to log on system.

Future Associate will

Repeat log on demonstration.

_____ 5. RC will

Future Associate will

_____ 6. RC will

Future Associate will

_____ 7. RC will

Future Associate will

Training Worksheet

Task: NCR - POS Sign -On and Sign-Off Procedures

_____ 8. RC will

Future Associate will

_____ 9. RC will

Future Associate will

_____ 10. RC will

Future Associate will

How tested:

_____ Role Play

_____ Customer

Date: _____

Training Worksheet

Lesson #70

Task:

NCR - POS ONE Procedures for Locking and Unlocking System

Terminal Objective: review with future Associate

How to Locking and Unlocking the NCR - POS ONE System

Prerequisites:

_____ Sales and Services Associate Training

_____ A processed PS Form 1357

Supplies and Equipment Needed for This Training Session:

_____ NCR – POS ONE System

_____ POS ONE – NCR Quick Reference Guide

Training Worksheet

Task: NCR - POS ONE Procedures for Locking and Unlocking of System

_____ 1. RC will

Explain security reasons for using stand by to temporarily lock system.

Future Associate will
State why you lock system and give examples.

_____ 2. RC will

Explain/demonstrate pressing stand by Dynakey and log back on lock key.

Future Associate will
Repeat demonstration.

_____ 3. RC will

Explain/demonstrate entering password for unlocking stand by emphasizing to key in ID as it appears on screen.

Future Associate will
Repeat demonstration.

_____ 4. RC will

Future Associate will

_____ 5. RC will

Future Associate will

_____ 6. RC will

Future Associate will

_____ 7. RC will

Future Associate will

Training Worksheet

Task: NCR - POS ONE Procedures for Locking and Unlocking System

_____ 8. RC will

Future Associate will

_____ 9. RC will

Future Associate will

_____ 10. RC will

Future Associate will

How tested:

_____ Role Play

_____ Customer

Date: _____

Training Worksheet

Lesson #71

Task:

IBM – POS ONE Sign-On and Sign-Off Procedures

Terminal Objective: review with future Associate

How to Sign-on and Sign-off on IBM – POS ONE system.

Prerequisites:

_____ Sales and Services Associate Training

_____ A processed PS Form 1357

Supplies and Equipment Needed for This Training Session:

_____ IBM - POS ONE Equipment

_____ POS ONE – IBM Quick Reference Guide

Training Worksheet

Task: IBM - POS Sign-On and Sign-Off Procedures

_____ 1. RC will
Explain/demonstrate touching clerk ID field and pick list.

Future Associate will
Touch clerk ID field.

_____ 2. RC will
Explain/demonstrate touching correct ID and <enter>”.

Future Associate will
Touch correct ID keys and <enter>.

_____ 3. RC will
Explain/demonstrate typing in the correct password and touch <enter>.

Future Associate will
Type in password and touch <enter>.

_____ 4. RC will
Explain/demonstrate touching the stock unit pick list, enter the correct stock unit, touch to complete.

Future Associate will
Touch stock unit list, enter correct stock unit, touch to complete.

_____ 5. RC will
Explain/demonstrate how to touch <quit> and sign off.

Future Associate will
Touch <quit> to sign off.

_____ 6. RC will
Explain/demonstrate how to touch <yes> and verify you are signing off system.

Future Associate will
Touch <yes> to sign off system.

_____ 7. RC will

Future Associate will

Training Worksheet

Task: IBM - POS Sign-On and Sign-Off Procedures

_____ 8. RC will

Future Associate will

_____ 9. RC will

Future Associate will

_____ 10. RC will

Future Associate will

How tested:

_____ Role Play

_____ Customer

Date: _____

Training Worksheet

Lesson #72

Task:

IBM - POS ONE Procedures for Locking and Unlocking System

Terminal Objective: review with future Associate
How to Lock and Unlock IBM - POS ONE System

Prerequisites:

_____ Sales and Services Associate Training
_____ A processed PS Form 1357

Supplies and Equipment Needed for This Training Session:

_____ IBM - POS ONE System
_____ POS ONE – IBM Quick Reference Guide

Training worksheet

Task: IBM - POS ONE Procedures for Locking and Unlocking System

_____ 1. RC will
Explain/demonstrate touching screen lock procedures.

Future Associate will
Touch screen lock procedures.

_____ 2. RC will
Explain/demonstrate touching screen to unlock and enter password.

Future Associate will
Touch screen to unlock and enter password.

_____ 3. RC will

Future Associate will

_____ 4. RC will

Future Associate will

_____ 5. RC will

Future Associate will

_____ 6. RC will

Future Associate will

_____ 7. RC will

Future Associate will

Training Worksheet

Task: IBM - POS ONE Procedures for Locking and Unlocking System

_____ 8. RC will

Future Associate will

_____ 9. RC will

Future Associate will

_____ 10. RC will

Future Associate will

How tested:

_____ Role Play

_____ Customer

Date: _____

Training Worksheet

Lesson #73

Task:

IBM - POS ONE Close-out Procedures

Terminal Objective: review with future Associate.

How to Close out of the Days Business on the IBM – POS ONE system

Prerequisites:

_____ Sales and Services Associate Training

Supplies and Equipment Needed for This Training Session:

_____ IBM - POS ONE System

_____ IBM – POS ONE Quick Reference Guide

Training Worksheet

Task: IBM - POS ONE Close-out Procedures

1. RC will

Explain/demonstrate touching clerk <Admin> on screen

Future Associate will

Touch clerk <Admin>

2. RC will

Explain/demonstrate touching <reports>, the <all reports> on screen

Future Associate will

Touch <admin> on screen, the <all reports>

3. RC will

Explain/demonstrate touching printer name <POS receipt customer>

Future Associate will

Touch <POS receipt customer>

4. RC will

Explain/demonstrate verifying reports against the trial 1412

Future Associate will

Verify reports against 1412

5. RC will

Explain/demonstrate touching <remit> then <final>, then <cash>. Verify actual cash amount on keypad and touch <enter>

Future Associate will

Touch <remit>, then <final>, the <cash>. Verify cash amount and touch <enter>

6. RC will

Explain/demonstrate touching <non-cash> tender, then <enter> to transfer funds to close out employee

Future Associate will

Touch <non-cash>, then <enter>, then transfer to close out employee

7. RC will

Explain/demonstrate taking all documentation to close out employee and wait to have all data verified

Future Associate will

Take all date to close employee to verify close of business day

Training Worksheet

Task: IBM -POS ONE Close-out Procedures

_____ 8. RC will
Explain/demonstrate running final 1412

Future Associate will
Run final 1412

_____ 9. RC will
Explain/demonstrate securing cash drawer and sign off system

Future Associate will
Secure cash drawer and sign off system

_____ 10. RC will

Future Associate will

How tested: _____ Role Play _____ Customer

Date: _____

Training Worksheet

Lesson #74

Task:

IBM/NCR – POS ONE Processing a Meter Refund

Terminal Objective: review with future Associate

How to Process a Meter Refund on the IBM/NCR - POS ONE System

Prerequisites:

_____ Sales and Services Associate Training

Supplies and Equipment Needed for This Training Session:

_____ Training forms (PS Form 3533, meter withdrawal form)

_____ Money order (training) _____ pen/pencil

_____ IBM/NCR POS ONE System

_____ IBM/NCR POS ONE Quick Reference Guide

Training Worksheet

Task: IBM/NCR - POS ONE Processing a Meter Refund

_____ 1. RC will

Explain/demonstrate how to complete PS Form 3533 and meter withdrawal form (customer information section).

Future Associate will
Complete forms.

_____ 2. RC will

Explain/demonstrate on equipment meter refund procedure following prompts using retail equipment (if applicable).

Future Associate will
Use equipment and follow prompts.

_____ 3. RC will

Explain/demonstrate how to issue and complete a no fee money (accounting office will issue a refund if over \$700).

Future Associate will
Issue and complete a no fee money order.

_____ 4. RC will

Explain/demonstrate where to send money order.

Future Associate will
State where to send money order.

_____ 5. RC will

Explain/demonstrate how to complete PS Form 3533 and to file documents. Note: money order number on bottom section and attach money order receipt.

Future Associate will
Complete PS Form 3533 and state what to do with documents.

_____ 6. RC will

Future Associate will

_____ 7. RC will

Future Associate will

Training Worksheet

Task: IBM/NCR - POS ONE Processing a Meter Refund

_____ 8. RC will

Future Associate will

_____ 9. RC will

Future Associate will

_____ 10. RC will

Future Associate will

How tested:

_____ Role Play

_____ Customer

Date: _____

Training Worksheet

Lesson #75

Task:

POS ONE/IRT Processing a Refund Using PS Form 3533

Terminal Objective: review with future Associate

How to Process a Refund Using a PS Form 3533

Prerequisites:

_____ Sales and Services Associate Training

_____ Knowledge of Domestic Mail Manual

_____ Knowledge of F-1 Post Office Accounting Procedures Manual

_____ Review **GIST**

Supplies and Equipment Needed for This Training Session:

_____ IRT/POS ONE System

_____ pen/pencil

_____ PS Form 3533

_____ Domestic Mail Manual

_____ F-1 Post Office Accounting Procedures Manual

NOTE to all RC's teaching this session:

Training step that is specific to clarifying questions to be asked of customer must include pertinent information on any or all of the following:

- **HAZMAT**
 - **Aviation Security**
-

Training Worksheet

Task: POS ONE/IRT Processing a Refund Using PS Form 3533

_____ 1. RC will:
Explain the uses of PS Form 3533.

Future Associate will:
Repeat uses of Form 3533.

_____ 2. RC will:
Demonstrate filling out PS Form 3533. Attach mailing receipt or PVI label if appropriate.

Future Associate will:
Fill out a PS Form 3533.

_____ 3. RC will:
Demonstrate entering PS Form 3533 (refund information) in appropriate AIC (IRT), GLA (POS), or Manual 1412.

Future Associate will:
Repeat demonstration.

_____ 4. RC will
Demonstrate how to process refund.

Future Associate will
Repeat demonstration.

_____ 5. RC will

Future Associate will

_____ 6. RC will

Future Associate will

_____ 7. RC will

Future Associate will

Training Worksheet

Task: POS ONE/IRT Processing a Refund Using PS Form 3533

_____ 8. RC will

Future Associate will

_____ 9. RC will

Future Associate will

_____ 10. RC will

Future Associate will

How tested:

_____ Role Play

_____ Customer

Date: _____

Training Worksheet

Lesson #76

Task:

IRT - MOS Close-Out Procedures

Terminal Objective: review with future Associate
How to Close Out of Business on the IRT - MOS

Prerequisites:

_____ Sales and Services Associate Training

Supplies and Equipment Needed for This Training Session:

_____ IRT Retail Equipment

_____ Standard retail supplies for unit

_____ pen/pencil

Training Worksheet

Task: IRT - MOS Close-Out Procedures

 1. RC will

Explain/demonstrate which lists are needed for close out.

Future Associate will

Print all lists required.

 2. RC will

Explain/demonstrate how to verify list to supporting documents.

Future Associate will

Verify lists to support documents.

 3. RC will

Explain/demonstrate verifying box rent receipts with shift box rent keys.

Future Associate will

Verify box rent receipts with shift box rent keys.

 4. RC will

Explain/demonstrate verifying miscellaneous AIC and support documents to shift AIC keys.

Future Associate will

Verify miscellaneous AIC and support documents.

 5. RC will

Explain/demonstrate running reports off TRANZ 380 and matching to AIC and support documents.

Future Associate will

Run reports off TRANZ 380 and match AIC to support documents.

 6. RC will

Explain/demonstrate counting cash from AIC to counting from cash drawer.

Future Associate will

Verify AIC and count cash to match.

 7. RC will

Explain/demonstrate how to adjust using trust or suspense to match cash deposit.

Future Associate will

Adjust AIC to match cash deposit.

Training Worksheet

Task: IRT - MOS Close-Out Procedures

_____ 8. RC will

Explain/demonstrate running a preliminary 1412 and have designated employee verify dollar amount of deposit to AIC.

Future Associate will

Run preliminary report and have designated unit employee verify deposit to AIC.

_____ 9. RC will

Explain/demonstrate running final 1412.

Future Associate will

Run final 1412.

_____ 10. RC will

Explain removing data disk, 1412, and all support documentation to unit designated close out employee. Secure drawer and accountable paper.

Future Associate will

Remove disk and hand all support documentation with final 1412 to designated employee.

How tested:

_____ Role Play

_____ Customer

Date: _____

Training Worksheet

Lesson #77

Task:

IRT Processing of a Meter Refund

Terminal Objective: review with future Associate
How to Process a Meter Refund on an IRT

Prerequisites:

_____ Sales and Services Associate Training

Supplies and Equipment Needed for This Training Session:

_____ PS form 3533 _____ pen/pencil
_____ Meter Withdrawal Form)
_____ Money Order (training)
_____ IRT System

Training Worksheet

Task: IRT Processing of a Meter Refund

_____ 1. RC will

Explain/demonstrate how to complete PS Form 3533 and meter withdrawal form.

Future Associate will

Demonstrate completing form.

_____ 2. RC will

Explain/demonstrate on equipment meter refund procedure following prompts.

Future Associate will

Enter on IRT.

_____ 3. RC will

Explain/demonstrate how to issue and complete a no-fee money order. Also explain accounting office will issue m/o refund over \$700.

Future Associate will

Issue and complete a no-fee money order.

_____ 4. RC will

Explain/demonstrate where to send money order.

Future Associate will

State where to send money order.

_____ 5. RC will

Explain/demonstrate how to complete PS Form 3533 and where to file documents. Notify MATS, take meter out of service.

Future Associate will

Complete PS Form 3533 and state what to do with documents.

_____ 6. RC will

Future Associate will

_____ 7. RC will

Future Associate will

Training Worksheet

Task: IRT Processing of a Meter Refund

_____ 8. RC will

Future Associate will

_____ 9. RC will

Future Associate

_____ 10. RC will

Future Associate

How tested:

_____ Role Play

_____ Customer

Date: _____

Training Worksheet

Lesson #78

Task:

IRT or POS ONE Voiding and Refunding a Debit Card Transaction

Terminal Objective: review with future Associate

How to Void and Refund a Debit Card Transaction on the IRT or POS ONE System

Prerequisites:

_____ Sales and Services Associate Training

Supplies and Equipment Needed for This Training Session:

_____ PS Form 3533

_____ IRT/POS ONE System

_____ IBM or NCR POS ONE Quick Reference Guide

_____ pen/pencil

Training Worksheet

Task: IRT or POS ONE Voiding and Refunding a Debit Card Transaction

_____ 1. RC will:

Demonstrate voiding a Debit Card on IRT or POS ONE system. ***Explain where to find procedures for POS ONE in the quick reference guide.***

Future Associate will:
Repeat Demonstration.

_____ 2. RC will:

Demonstrate proper procedures for filling out a PS Form 3533.

Future Associate will:
Repeat Demonstration.

_____ 3. RC will:

Explain the difference between a debit card refund and a credit card void.

Future Associate will:
State difference.

_____ 4. RC will

Future Associate will

_____ 5. RC will

Future Associate will

_____ 6. RC will

Future Associate will

_____ 7. RC will

Future Associate will

Training Worksheet

Task: IRT or POS ONE Voiding and Refunding a Debit Card Transaction

_____ 8. RC will

Future Associate will

_____ 9. RC will

Future Associate will

_____ 10. RC will

Future Associate will

How tested:

_____ Role Play

_____ Customer

Date: _____

Training Worksheet

Lesson #79

Task:

IRT or POS ONE , or Manual Processing of a Travel Request

Terminal Objective: review with future Associate
How to Process a Travel Advance Request

Prerequisites:

_____ Sales and Services Associate Training

Supplies and Equipment Needed for This Training Session:

_____ PS Form 1164
_____ IRT/POS ONE System
_____ Manual PS Form 1412
_____ pen/pencil

Training Worksheet

Task: IRT or POS ONE, or Manual Processing of a Travel Advance Request

_____ 1. RC will:

Explain purpose and demonstrate proper completion of PS Form 1164.

Future Associate will:

State purpose of PS Form 1164 and repeat demonstration.

_____ 2. RC will:

Demonstrate making proper entries on IRT, POS ONE, or Manual PS Form 1412.

Future Associate will:

Repeat demonstration.

_____ 3. RC will

Explain/demonstrate how to distribute payment.

Future Associate will

Repeat demonstration.

_____ 4. RC will

Future Associate will

_____ 5. RC will

Future Associate will

_____ 6. RC will

Future Associate will

_____ 7. RC will

Future Associate will

Training Worksheet

Task: IRT or POS ONE, or Manual Processing of a Travel Advance Request

_____ 8. RC will

Future Associate will

_____ 9. RC will

Future Associate will

_____ 10. RC will

Future Associate will

How tested:

_____ Role Play

_____ Customer

Date: _____

Training Worksheet

Lesson #80

Task Name:

IRT/PVI Boot-up Procedures for Unisys Phase III IRT / Clerk Start of Day

Terminal Objective: review with future Associate

How to Boot up and Start of Day Procedures on IRT/PVI

Prerequisites:

_____ Sales and Services Associate Training

Training Tools:

_____ IRT/PVI Systems

_____ Clerk Disc

_____ pen/pencil

Training Worksheet

Task: IRT/PVI Boot-up Procedures for Unisys Phase III IRT/ Clerk Start of Day

_____ 1. RC will

Demonstrate turning on PVI and removing label.

Future Associate will
Repeat demonstration.

_____ 2. RC will

Demonstrate inserting clerk disc before turning on IRT.

Future Associate will
Repeat demonstration

_____ 3. RC will

Demonstrate to clerk how to key in six-digit log-on ID.

Future Associate will
Repeat demonstration.

_____ 4. RC will

Show and review starts of day printout information.

Future Associate will
Identify start of day print out information.

_____ 5. RC will

Demonstrate running PVI test labels for print clarity.

Future Associate will
Repeat demonstration.

_____ 6. RC will

Future Associate will

_____ 7. RC will

Future Associate will

Training Worksheet

Task: IRT/PVI Boot-up Procedures for Unisys Phase III IRT/ Clerk Start of Day

_____ 8. RC will

Future Associate will

_____ 9. RC will

Future Associate will

_____ 10. RC will

Future Associate will

How tested:

_____ Role Play

_____ Customer

Date: _____

Training Worksheet

Lesson #81

Task:

IRT or POS ONE Processing of a Self Service Equipment Refund

Terminal Objective: review with future Associate
How to Process a Self Service Equipment Refund

Prerequisites:

_____ Sales and Services Associate Training

Supplies and Equipment Needed for This Training Session:

_____ IRT/POS ONE System _____ POS ONE Quick Reference Guide
_____ PS Form 4314-C _____ pen/pencil
_____ PS Form 1096
_____ Domestic Mail Manual
_____ Handbook 201

Training Worksheet

Task: IRT or POS ONE Processing of a Self Service Equipment Refund

_____ 1. RC will

Explain/demonstrate professional greeting technique (**GIST**).

Future Associate will
Repeat demonstration.

_____ 2. RC will

Explain how to ask clarifying questions to determine customer needs, explain benefits and features physically check the equipment for unnoticed postage (**GIST**).

Future Associate will
Ask clarifying questions to determine customer needs, explaining benefits and features.

_____ 3. RC will

Explain the use of PS Form 4314-C for the refund process and verify customer information.

Future Associate will
Repeat demonstration.

_____ 4. RC will

Demonstrate how to process the refund using PS Form 1096.

Future Associate will
Repeat demonstration.

_____ 5. RC will

Explain value sell techniques (**GIST**).

Future Associate will
Explain value sell

_____ 6. RC will

Explain closing professionally (**GIST**). If customer makes additional purchase, process payment.

Future Associate will
Demonstrate professional closing. If customer makes additional purchase, process payment.

_____ 7. RC will

Demonstrate how to file forms properly.

Future Associate will
Repeat Demonstration.

Training Worksheet

Task: IRT or POS ONE Processing of a Self Service Equipment Refund

_____ 8. RC will

Future Associate will

_____ 9. RC will

Future Associate will

_____ 10. RC will

Future Associate will

How tested:

_____ Role Play

_____ Customer

Date: _____

Training Worksheet

Lesson #82

Task:

Phase III IRT Start-up Procedures

Terminal Objective: review with future Associate

How to Start-up a Phase III IRT System

Prerequisites:

_____ Sales and Services Retail Training Program

Supplies and Equipment Needed for This Training Session:

_____ Phase III IRT System

_____ Program disk

_____ Clerk Disk

_____ pen/pencil

Training Worksheet

Task: Phase III IRT Start-up Procedures

_____ 1. RC will
Explain/demonstrate inserting program disk into machine and turning "on" equipment

Future Associate will
Repeat demonstration

_____ 2. RC will
Explain importance of waiting for clerk message prompt on equipment

Future Associate will
State importance of waiting for clerk message prompt on equipment

_____ 3. RC will
Explain/demonstrate removing the program disc and inserting clerk disk

Future Associate will
Repeat demonstration

_____ 4. RC will
Explain/demonstrate entering clerks ID number and password

Future Associate will
Repeat demonstration

_____ 5. RC will

Future Associate will

_____ 6. RC will

Future Associate will

_____ 7. RC will

Future Associate will

Training Worksheet

Task: Phase III IRT Start-up Procedures

_____ 8. RC will

Future Associate will

_____ 9. RC will

Future Associate will

_____ 10. RC will

Future Associate will

How tested:

_____ Role Play

_____ Customer

Date: _____

Training Worksheet

Lesson #83

Task:

Manual Close-Out Daily PS Form 1412

Terminal Objective: review with future Associate

How to Manually Complete a Manual PS Form 1412 at Close-Out

Prerequisites:

_____ Sales and Services Associate Training

_____ F-1 Manual

Supplies and Equipment Needed for This Training Session:

_____ Calculator

_____ PS Form 1412

_____ All accountable receipts for that business day

_____ pen/pencil

Training Worksheet

Task: Manual Close-Out Daily PS Form 1412

_____ 1. RC will

Review PS Form 1412 (Heading, Receipts, Receipts Control, Disbursements, Food Coupon Inventory, and Stamp Accountability) and Account Identifier Codes (AIC's).

Future Associate will
Identify PS Form 1412 and all its components.

_____ 2. RC will

Demonstrate where to enter opening balance on PS Form 1412.

Future Associate will
Repeat demonstration.

_____ 3. RC will

Demonstrate how to complete banking process.

Future Associate will
Repeat demonstration.

_____ 4. RC will

Demonstrate proper grouping of receipts and vouchers by AIC.

Future Associate will
Repeat demonstration.

_____ 5. RC will

Explain proper entries on PS Form 1412 in appropriate AIC.

Future Associate will
State proper entries on PS Form 1412 in appropriate AIC.

_____ 6. RC will

Demonstrate how to add disbursements and total in AIC 800. Demonstrate how to arrive at postage sales AIC 090 (subtracting all AIC entries from AIC 800). Add receipt side and enter total in AIC 400, ensuring AIC 400 balances with AIC 800.

Future Associate will
Repeat demonstration.

_____ 7. RC will

Demonstrate how to add appropriate sales from left side of PS Form 1412, subtract total to arrive at closing balance on next days PS Form 1412, as opening balance.

Future Associate will
Repeat demonstration.

Training Worksheet

Task: Manual Close-Out Daily PS Form 1412

_____ 8. RC will

Explain what items to complete and sign in heading section.

Future Associate will
Complete and sign appropriate sections of heading.

_____ 9. RC will

Future Associate will

_____ 10. RC will

Future Associate will

How tested:

_____ Role Play

_____ Customer

Date: _____

Training Worksheet

Lesson #84

Task:

TRANZ 380 Voiding a Credit Card Transaction

Terminal Objective: review with future Associate

TRANZ 380 Procedure for Voiding a Credit Card Transaction

Prerequisites:

_____ Sales and Services Associate Training

Supplies and Equipment Needed for This Training Session:

_____ TRANZ 380 _____ pen/pencil

_____ IRT/POS ONE System

_____ Credit Card (training)

_____ IBM or NCR POS ONE Quick Reference Guide

Training Worksheet

Task: TRANZ 380 Voiding a Credit Card Transaction

_____ 1. RC will:
Demonstrate voiding credit card transaction on TRANZ 380

Future Associate will:
Repeat demonstration

_____ 2. RC will:
Demonstrate voiding credit card transaction on the IRT or, making adjustments on the POS ONE system with the correct GLA. Note: **Use the POS ONE Quick Reference Guide**

Future Associate will:
Repeat demonstration

_____ 3. RC will
Explain/demonstrate that the customer signs voided receipt which is attached to original

Future Associate will
Repeat demonstration

_____ 4. RC will
Explain closing professionally (**GIST**) Include letting customer know about additional supplies

Future Associate will
Demonstrate professional closing

_____ 5. RC will

Future Associate will

_____ 6. RC will

Future Associate will

_____ 7. RC will

Future Associate will

Training Worksheet

Task: TRANZ 380 Voiding a Credit Card Transaction

_____ 8. RC will

Future Associate will

_____ 9. RC will

Future Associate will

_____ 10. RC will

Future Associate will

How tested:

_____ Role Play

_____ Customer

Date: _____

Training Worksheet

Lesson #85

Task:

NCR - POS ONE Close-Out Procedures

Terminal Objective: review with future Associate.

How to Close out of the Days Business on the NCR – POS ONE system

Prerequisites:

_____ Sales and Services Associate Training

Supplies and Equipment Needed for This Training Session:

_____ NCR - POS ONE System

_____ NCR – POS ONE Quick Reference Guide

Training Worksheet

Task: NCR - POS ONE Close-Out Procedures

_____ 1. RC will

Explain/demonstrate pressing Clerk Services/Back Office key. Then <Administrative Functions>.

Future Associate will
Repeat demonstration.

_____ 2. RC will

Explain/demonstrate pressing <Reports>.

Future Associate will
Repeat demonstration.

_____ 3. RC will

Explain/demonstrate pressing <View or Print Reports>.

Future Associate will
Repeat demonstration.

_____ 4. RC will

Explain/demonstrate verifying reports against the trial 1412

Future Associate will
Repeat demonstration.

_____ 5. RC will

Explain/demonstrate pressing <End Clerk's Day> then <Count Final Deposit>.

Future Associate will
Repeat demonstration.

_____ 6. RC will

Explain/demonstrate pressing <Personal Checks> tender, and all other applicable non-cash tenders, then Cash Retained> to retain \$100.00 plus change. Explain press <Count Final Deposit> to enter cash amount of deposit.

Future Associate will
Repeat demonstration.

_____ 7. RC will

Explain/demonstrate taking all documentation to close out employee and wait to have all data verified.

Future Associate will
Repeat demonstration.

Training Worksheet

Task: NCR - POS ONE Close-Out Procedures

_____ 8. RC will
Explain/demonstrate running final 1412.

Future Associate will
Repeat demonstration.

_____ 9. RC will
Explain/demonstrate securing cash drawer and sign off system

Future Associate will
Repeat demonstration.

_____ 10. RC will

Future Associate will

How tested:

_____ Role Play

_____ Customer

Date: _____