

# American Postal Workers Union, AFL-CIO

## Memorandum

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June 22, 2000



from the Office of THOMAS "TOMMY" THOMPSON  
*T.T.* Assistant Director, Clerk Division

TO: Regional Coordinators  
National Business Agents, Clerk Division  
500 Largest Locals

RE: A Guide to: LDC 45 DOLLAR\$ & SENSE  
(LDC 45 Efficiency Process) &  
Window Operation Survey And Daily Schedule (WOS)

**A Guide to: LDC 45 DOLLAR\$ & SENSE  
(LDC 45 Efficiency Process) &  
Window Operation Survey And Daily Schedule**

When I received calls concerning whether National was notified about WOS I stated emphatically, no. However, I would check with the United States Postal Service just in case. For a while I received no response. Upon my second inquiry, which was a reminder of the first, I was told the American Postal Workers Union was notified, which I replied give me the date and subject because I had nothing under WOS. The USPS gave me several subjects none of which I had. The USPS then said we gave you a book on the subject. I called back and said I have no book on the subject. The USPS said we will check our letter to Moe on the subject. The USPS called and said we sent a letter to Moe on September 20, 1999 on the subject. I checked Moe's letter to us for discussion and found the reference subject: IRT Retail Analysis Profile, which I had a file on with a book called A Guide To LDC 45 Dollars and Sense (LDC 45 Efficiency Process). I called back the USPS and said I have that subject, but it had nothing to do with WOS. They said check the second page at the top, and the third and fourth and so forth (attached). I said this was restricted to IRT and is nothing like the WOS sent to the field covering all offices (attached). The USPS said it was intended to cover all offices. And I said, you did not tell me.

This is just a brief report the way things go at headquarters, which is not much different from the field.

TLT:sec  
opeiu #2

**A Guide to:**

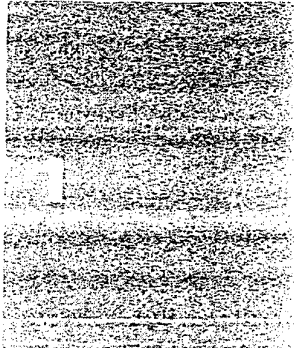
**LDC 45**

**DOLLAR\$**

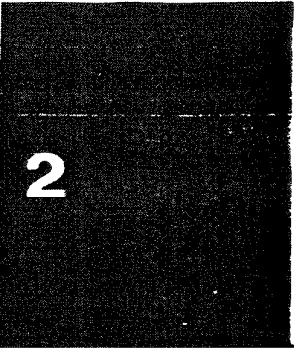
**&**

**SENSE**

**(LDC 45 Efficiency Process)**

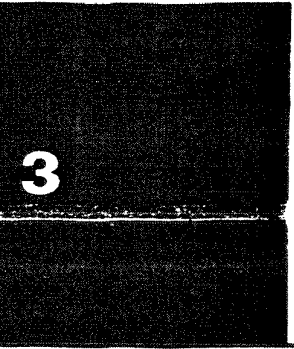


**Staffing (WOS) Getting Started Data Collection**



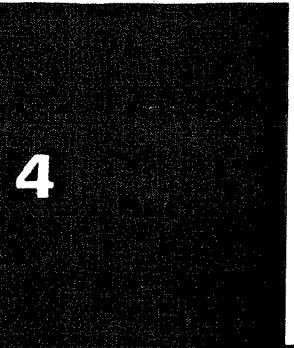
**2**

**Data Input  
(AIC Worksheet)**



**3**

**Data Input Software**



**4**

**Scheduling  
(PS Form 1994)**



**5**

**Best Practices  
Presentation Overview**

LDC 45 Efficiency Process

Window Operation Survey  
W. O. S.

LDC 45  
HOURS

SCHEDULING

STAFFING



WAIT IN LINE

# OF  
CUSTOMERS

WINDOW  
CLERK EOU

HOURS OF  
OPERATION

VENDING

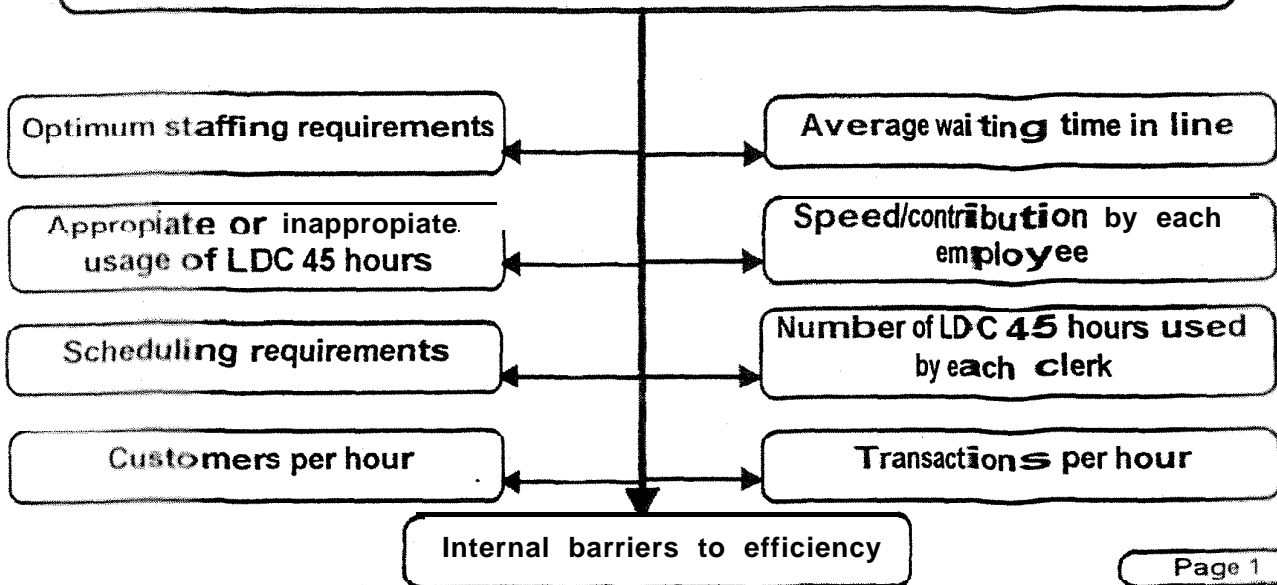
*Mr. and Mrs. NoName  
457 Ubbowen street  
City of Mystery  
EverywhereLand*

# Window Operation Survey (WOS)

The Function 4 Window Operation Survey is an accurate, cost effective tool that enables users to balance window staffing with costs and customer satisfaction. If properly conducted and evaluated, the survey will enable the postmaster to provide window service that better-meets customer's demand. It will tell the postmaster what was sold, and when it was sold. The survey can indicate peak and slack times by both hour and day to help properly staff for breaks, lunches and non-scheduled days. The tool will help in determining optimum staffing by unit.

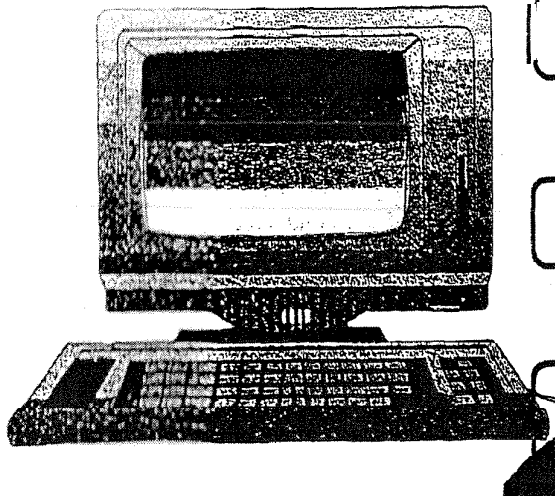
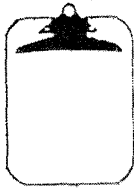
## Getting Started

The person performing the review must fully understand the Function 4 window audit procedures before getting started. If any procedure of the audit is omitted, the Function 4 Window Operation Survey could be invalid. The information acquired from the worksheets, which is vital in creating a more efficient operation, includes the following:



# Window Operation Survey (WOS)

## TOOLS NEEDED



Clerk schedule for the day which includes lunch and breaks periods (See page four).

Clip board and pencil

Stop watch

Customer Tally Sheet (Exhibit B-1)

Window Operation Survey procedures

Window Operation Survey Diskette

Access to a computer with Excel to input survey & transaction data.

The person conducting the review must devote full time and attention to the window operation. The individual must be aware of and record many activities that are occurring simultaneously. Consequently, distractions must be minimized.



**UNITED STATES POSTAL SERVICE**

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**RETAIL OPERATIONS**

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# **WINDOW OPERATION SURVEY**

**AND**

# **DAILY SCHEDULE**

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# **WOS/DAILY SCHEDULE**

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## **FOCUS**

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### **Service**

- **Raise the level of service provided retail customers**
- **Increase customer satisfaction**

### **Workhour Control**

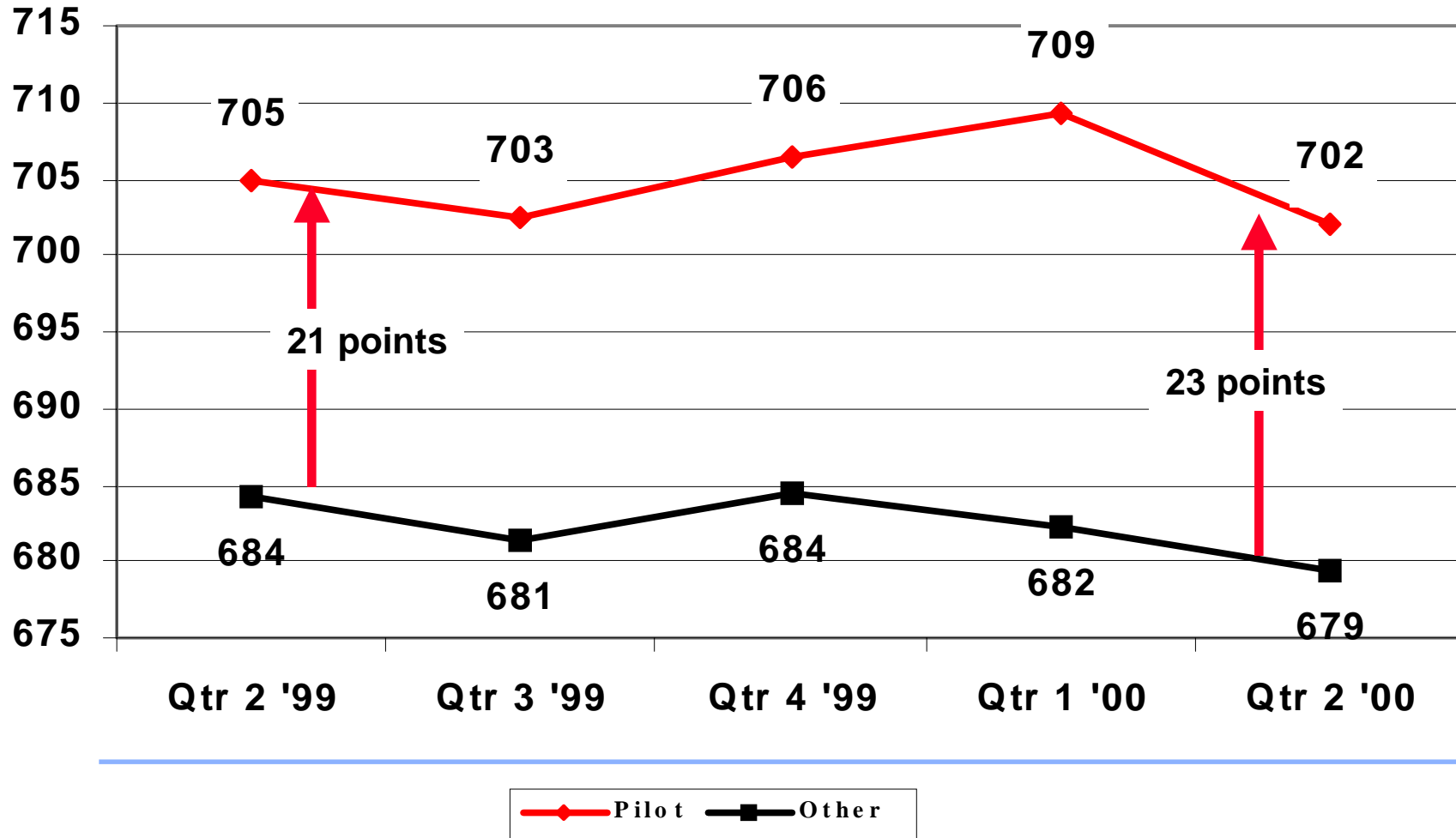
- **Control costs through managing staffing to workload**
-





# WOS/DAILY SCHEDULE

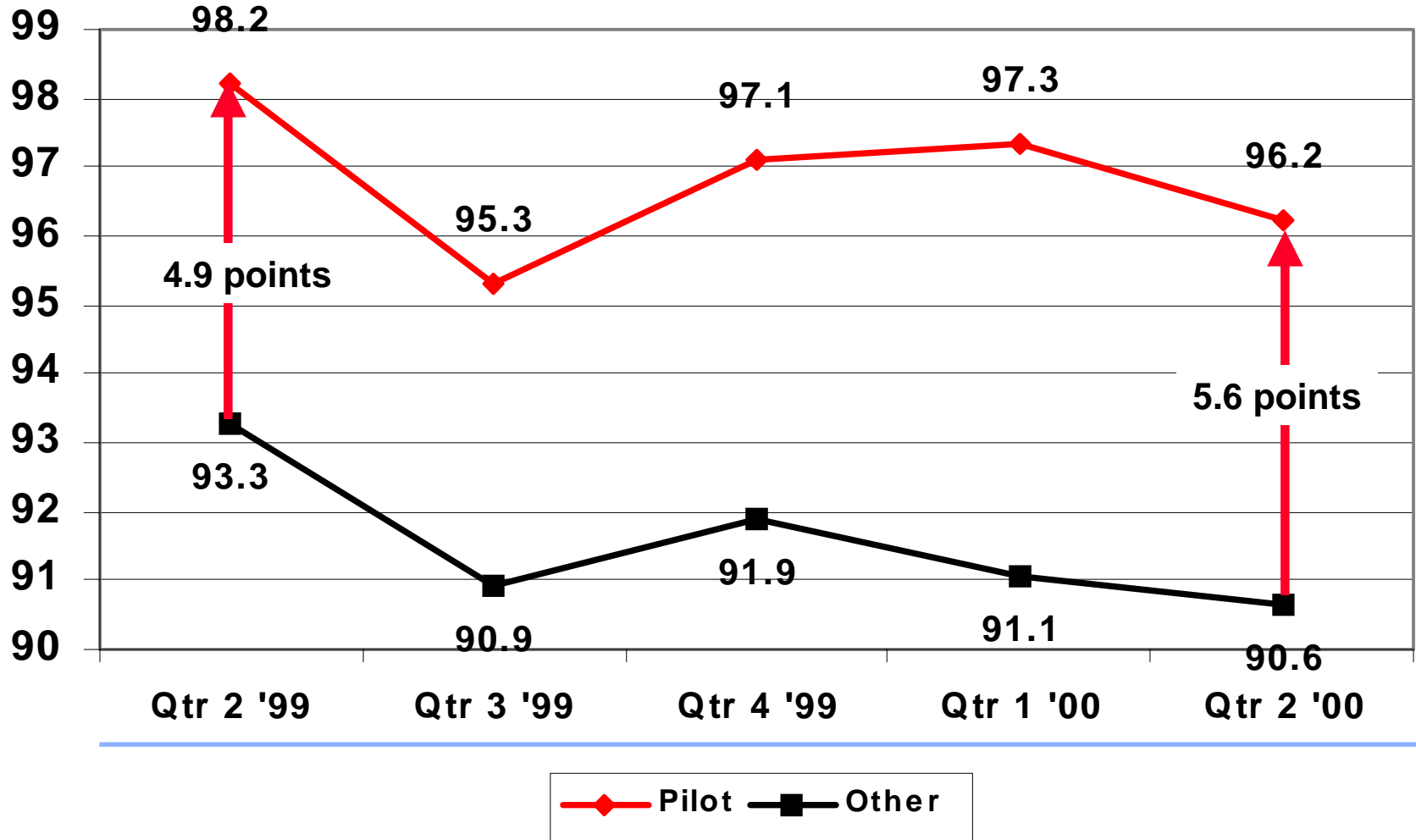
## EOU RESIDENTIAL TRENDS PILOT VS OTHER AREAS





# WOS/DAILY SCHEDULE

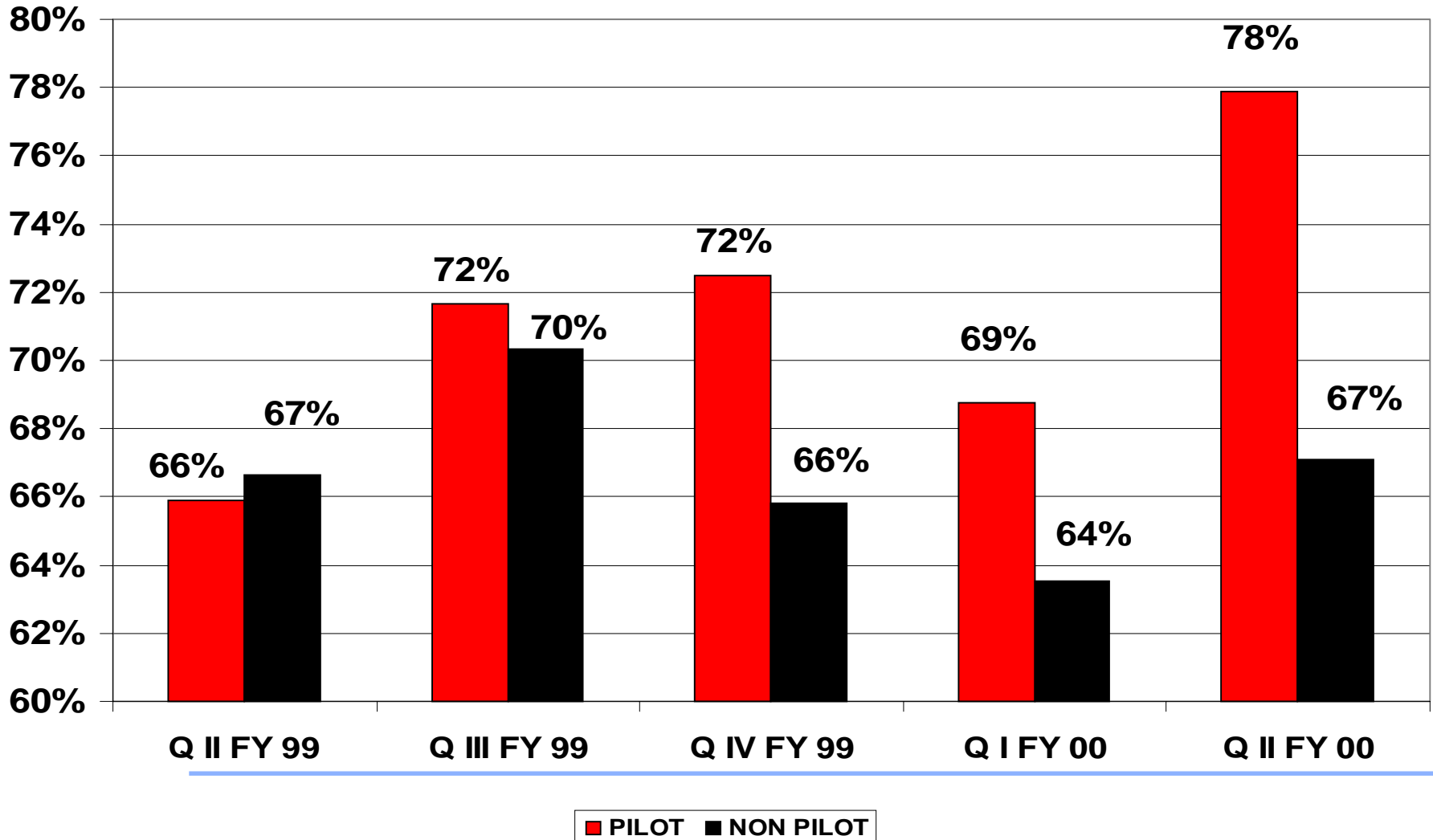
## EOU RESIDENTIAL "WAIT TIME IN LINE" - PILOT VS OTHER AREAS





# WOS/DAILY SCHEDULE

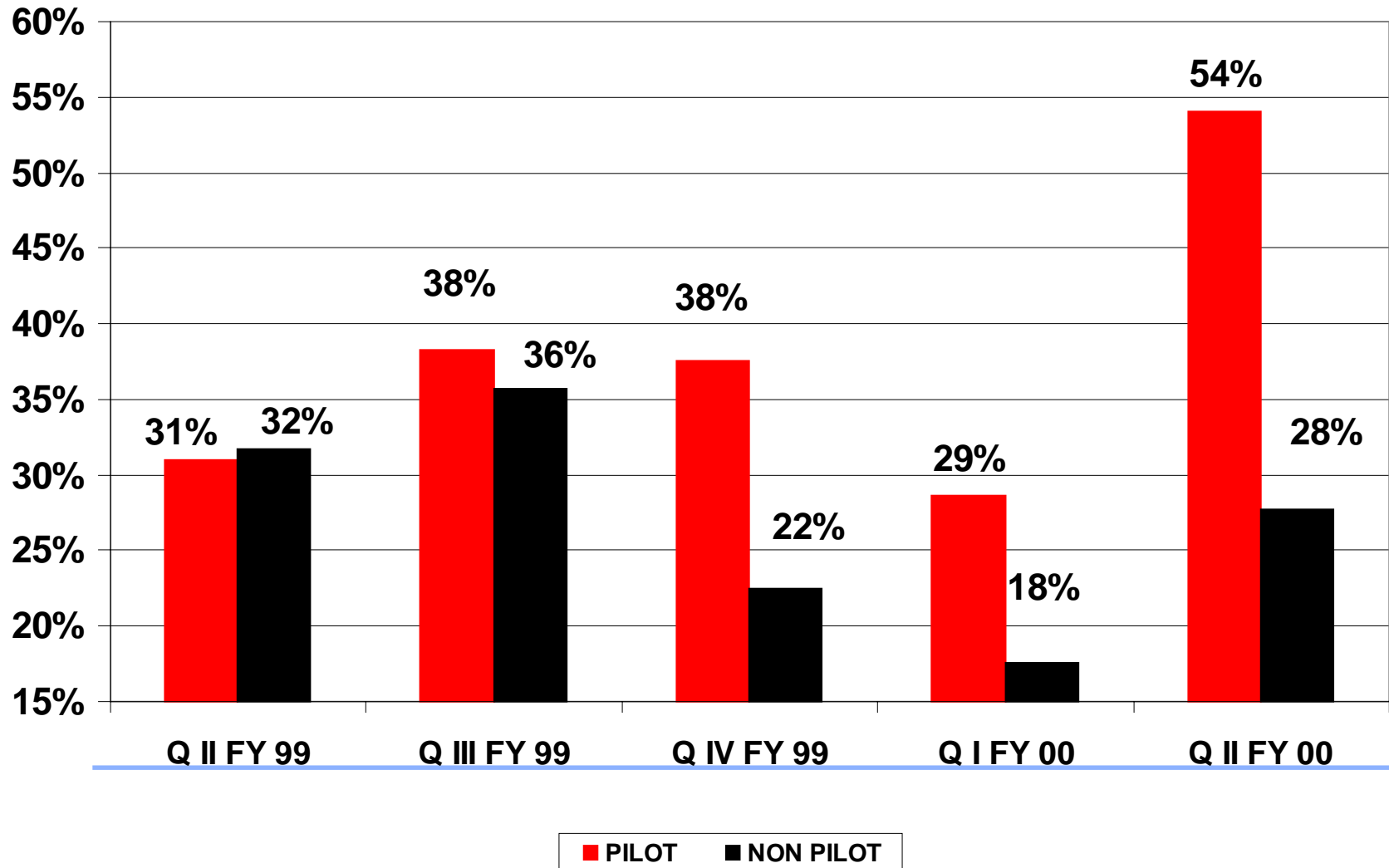
## MYSTERY SHOPPER OVERALL SCORE PILOT VS OTHER AREAS





# WOS/DAILY SCHEDULE

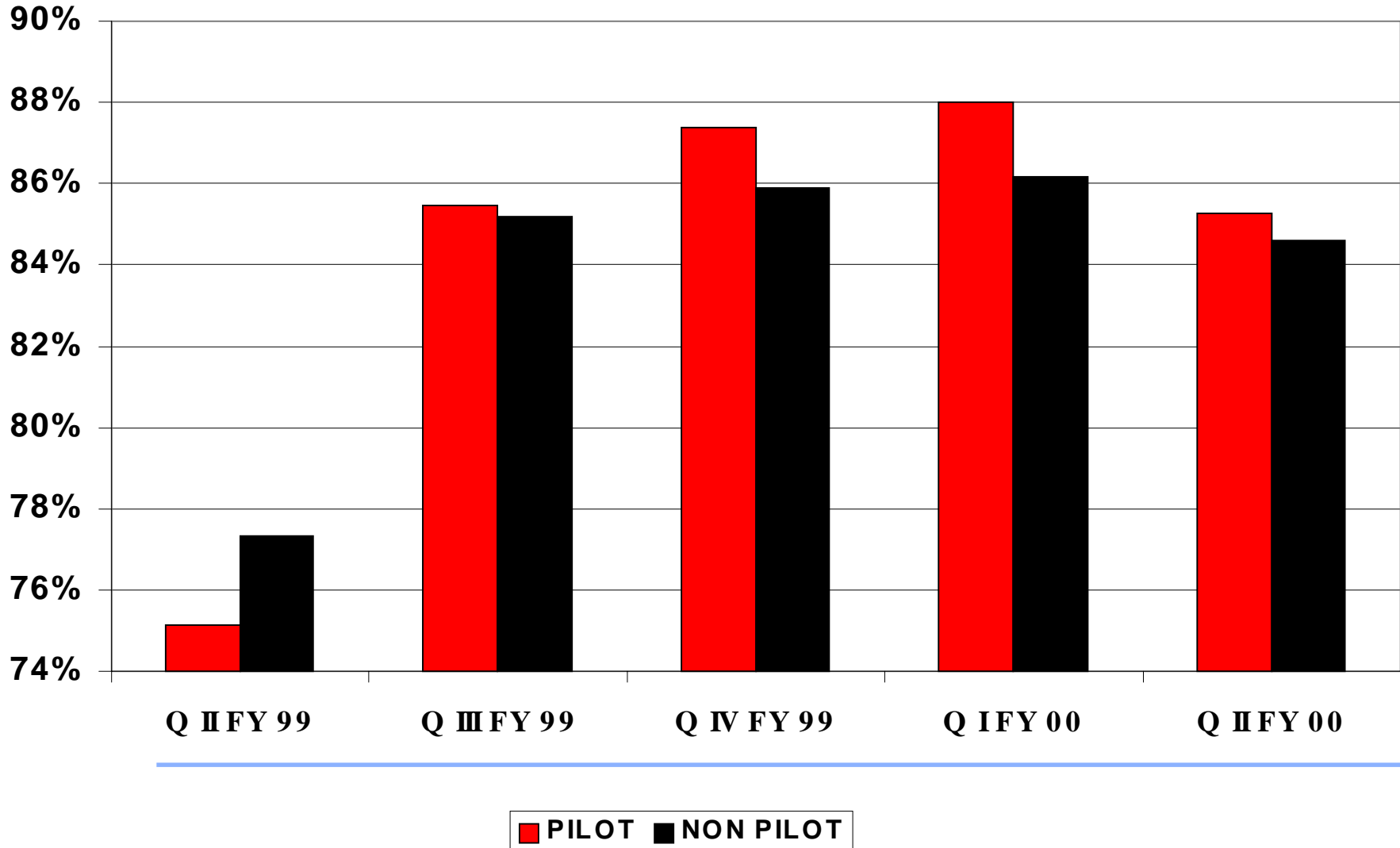
## MYSTERY SHOPPER "SALES SKILLS" PILOT VS OTHER AREAS





# WOS/DAILY SCHEDULE

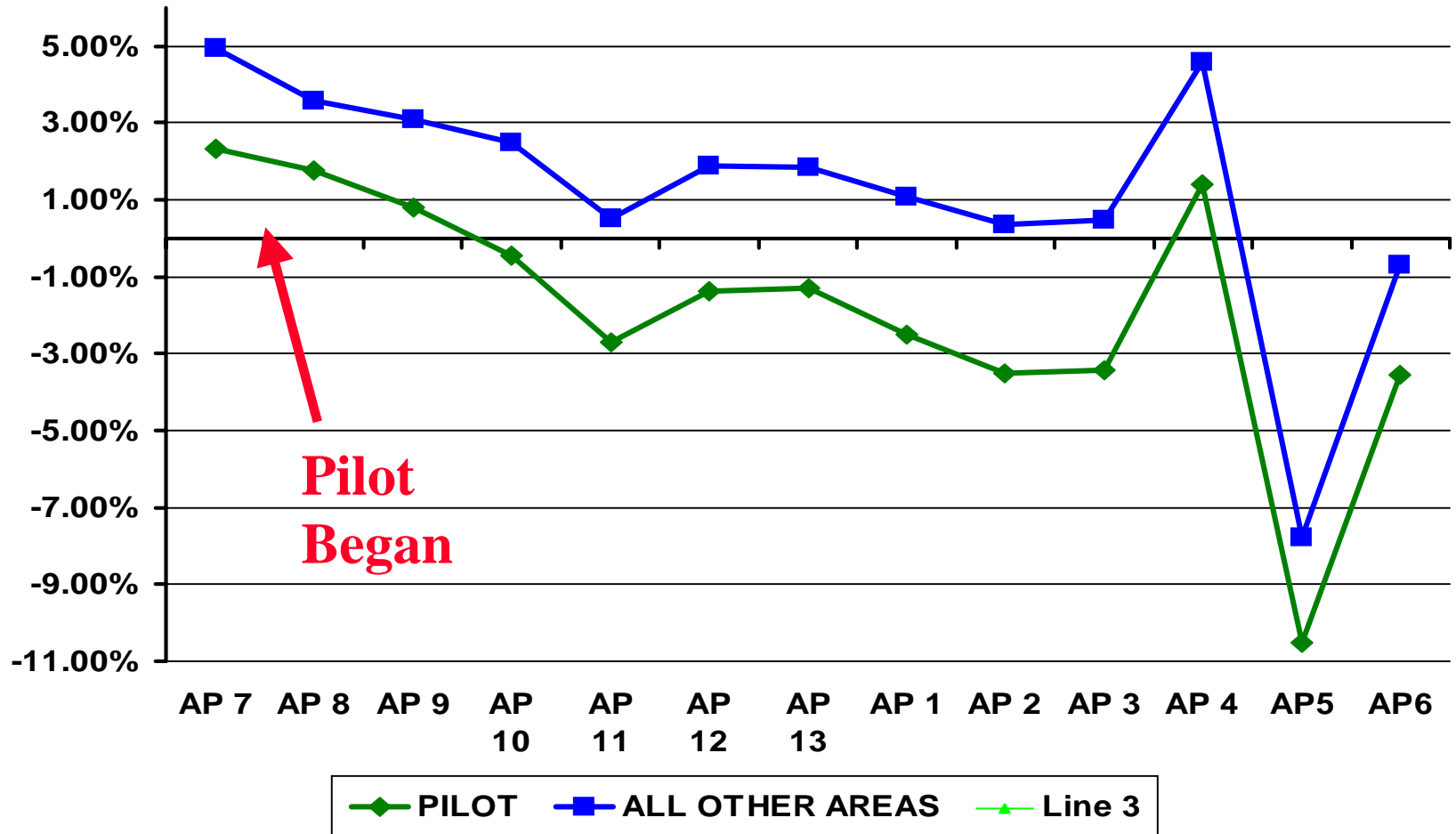
## MYSTERY SHOPPER OPERATIONAL EFFICIENCY PILOT VS OTHER AREAS





# WOS/DAILY SCHEDULE

## RETAIL WORKHOURS (LDC 45/46)

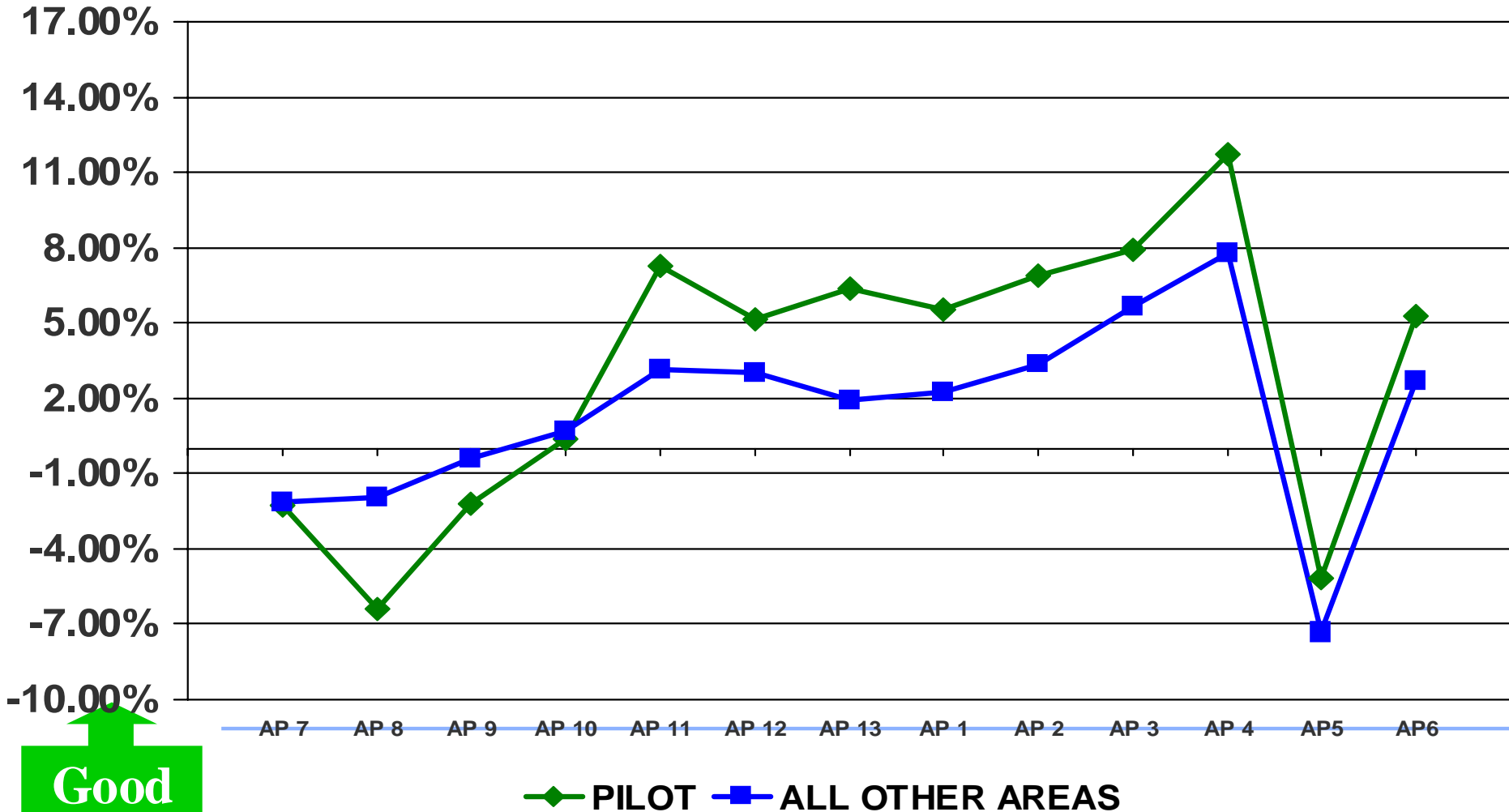


**Good**



# WOS/DAILY SCHEDULE

## REVENUE PER WORKHOUR BY AP % TO SPLY



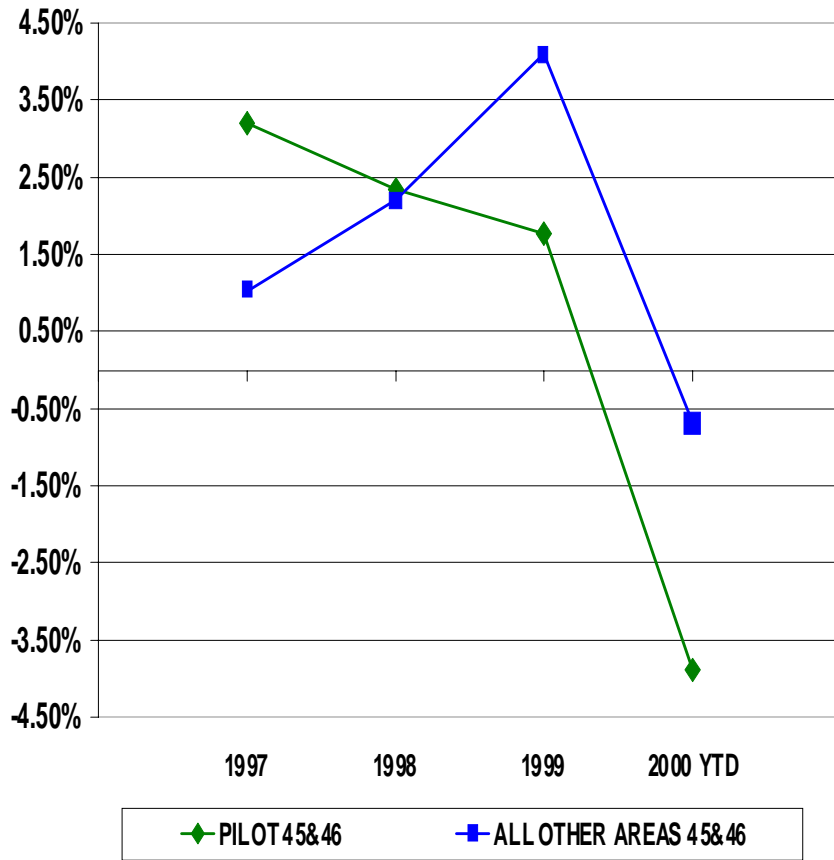
Good



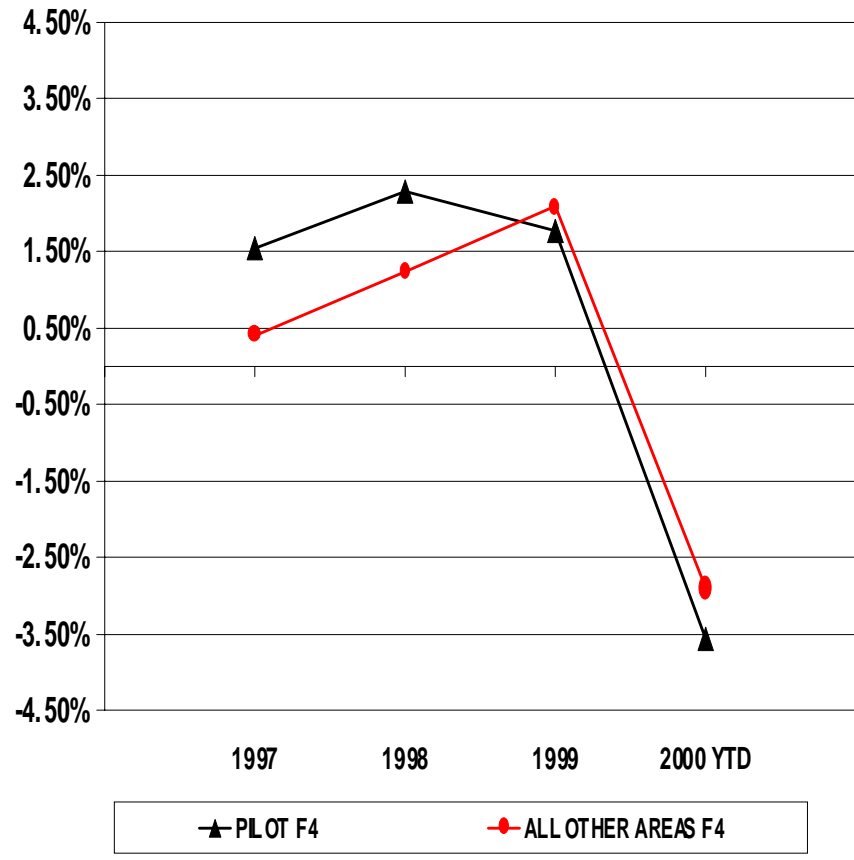
# WOS/DAILY SCHEDULE

## FUNCTION 4 AND LDC 45 COMPARISON

### LDC 45 & 46



### TOTAL FUNCTION 4







# **WOS/DAILY SCHEDULE**

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## **WOS OVERVIEW**

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- **Window Operations Survey (WOS)**
  - **Daily Schedule**
-



# WOS DAILY SCHEDULE

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## WOS OVERVIEW

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- **Southeast Area Results**
  - **WOS Process and Benefits?**
-



# **WOS DAILY SCHEDULE**

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## **WOS OVERVIEW**

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### **Return On Investment**

#### **Southeast Area results AP 7**

- **15% - 18 % Negotiated LDC 45 WKHRS**
  - **5.5% Captured**
  - **13% Opportunities for incremental improvement**
-



# **WOS/DAILY SCHEDULE**

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## **WOS OVERVIEW**

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### **Data Driven Program**

- **Data retrieved from POS/IRT, Timekeeping & Financial reports**

### **Defines Workload**

- **Transaction Type and Time Factors**

### **Identifies Operational Inefficiencies**

- **Observations of window operations by experienced supervisors/managers**
-



# **WOS/DAILY SCHEDULE**

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## **WOS OVERVIEW**

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### **Identifies Service Failures**

- **Customer count and wait time in line**

### **Identifies Productivity Target**

- **Matches workload to workhours**

### **Timely Implementation**

- **Data Complete at end of WOS week**

### **Provides tool to improve service**

- **Daily Schedule**
-



# **WOS/DAILY SCHEDULE**

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## **WOS OVERVIEW**

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### **WOS Process**

- **Preparation**
    - **Identify Offices**
    - **Eight Week Analysis**
    - **Management/Craft Briefing**
  - **Data Collection**
    - **6 Days from POS/IRT**
-





# WOS/DAILY SCHEDULE

## WOS OVERVIEW

### Minutes per Transaction

Item Description	AIC	8:00 9:00	9:00 10:00	10:00 11:00	11:00 12:00	12:00 13:00	13:00 14:00	14:00 15:00	15:00 16:00	16:00 17:10	Total Minutes	IRT Factors
Non Revenue	000	38.08	42.84	35.70	40.46	27.37	42.84	23.80	27.37	32.13	310.6	1.19
Permit Imprint	052	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.0	2.88
BRM Ann.Fee	053	0.00	0.00	0.00	0.00	0.00	2.80	0.00	0.00	0.00	2.8	2.80
Customs	054	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.0	1.97
Breast Cancer St.	084	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.0	0.78
Celebrate Century	085	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.0	0.78
Postage	090	28.86	39.00	70.20	53.04	34.32	63.96	49.14	50.70	35.10	424.3	0.78
Philatelic	092	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.0	1.08
Retail Product	093	0.00	3.58	3.58	1.79	8.95	0.00	7.16	7.16	1.79	34.0	1.79
Stamps by Mail	094	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.0	1.74
Bugs/Tweety St.	097	0.00	0.00	0.00	0.78	0.00	0.00	0.00	0.00	0.78	1.6	0.78
Philatelic	098	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	2.16	2.2	1.08
PhoneCards	099	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.0	1.50
Dom. Money Ord.	100	5.00	11.00	16.00	5.00	12.00	20.00	12.00	11.00	12.00	104.0	1.00
Int. Money Ord.	102	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.0	1.08
Dinero Seguro	105	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.0	6.00
P.V.I.	109	30.80	40.48	72.16	65.12	44.00	77.44	60.72	70.40	69.52	530.6	0.88
Cust. Meter	111	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.0	5.06
Postage Due	114	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.0	1.79
P.O.B. Rent	115	0.00	0.00	0.00	2.80	0.00	0.00	0.00	0.00	0.00	2.8	2.80
Misc. N Postal/Oth.	126	0.00	0.00	0.00	0.00	0.00	0.00	0.78	0.00	0.00	0.8	0.78
Tweety Merchand.	231	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.0	1.08
Passport	264	0.00	0.00	7.00	0.00	7.00	0.00	0.00	7.00	0.00	21.0	7.00
COD Funds	450	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.0	1.97
Perm.Imp. WD	452	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.0	2.88
Refunds	536	0.00	2.80	0.00	0.00	0.00	0.00	0.00	0.00	2.80	5.6	2.80
Supplies & Servcs.	539	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.0	1.19
No Fee M.O.	586	0.00	1.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	1.0	1.00
Refund - Misc.	624	0.00	0.00	0.00	0.00	2.80	0.00	0.00	0.00	0.00	2.8	2.80
Cash Remit Adv.	751	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.0	5.09
<b>TOTAL</b>		<b>102.74</b>	<b>140.70</b>	<b>204.64</b>	<b>168.99</b>	<b>136.44</b>	<b>207.04</b>	<b>153.60</b>	<b>173.63</b>	<b>156.28</b>	<b>1444.1</b>	
<b>Proposed Staff</b>		<b>2.3</b>	<b>3.1</b>	<b>4.5</b>	<b>3.8</b>	<b>3.0</b>	<b>4.6</b>	<b>3.4</b>	<b>3.9</b>	<b>3.0</b>		





# **WOS/DAILY SCHEDULE**

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## **WOS OVERVIEW**

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### **WOS Process**

- **Observation**
    - **2 weekdays and Saturday**
  - **Analysis**
    - **Identify Service level/Inefficiencies**
    - **Develop recommended solutions**
    - **Determine productivity level**
-



# **WOS/DAILY SCHEDULE**

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## **WOS OVERVIEW**

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### **WOS Process**

#### **Pre-Exit/Exit Conference**

- **Negotiate productivity**
- **Develop Action Plan**
- **Gain Commitment to Plan**

#### **Follow-Up**

- **On-site in 14 days/30 days**
  - **Monitor report on ongoing basis**
-



# **WOS/DAILY SCHEDULE**

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## **WOS OVERVIEW**

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### **What Have We Identified?**

- **Level of service provided customers**
  - **Best practices**
  - **Operational inefficiencies**
  - **Workload for the unit**
  - **Window staffing needed to meet service needs**
  - **Image projected to customers**
  - **Anomalies that may impact the units operation**
-



# **WOS/DAILY SCHEDULE**

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## **WOS OVERVIEW**

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**RETAIL MGR.**

**MPOO**

**WOS  
COORDINATOR**

**POSTMASTER**



**CLERKS**

**UNIT MGR.**

**SUPV.**

**WOS TEAM  
LEADER**

**WOS TEAM  
MEMBERS**

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# **WOS/DAILY SCHEDULE**

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## **WOS/DAILY SCHEDULE INTERFACE**

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- **WOS set-up sheet**
  - **Weekly Recap**
  - **Daily Schedule**
-





# WOS/DAILY SCHEDULE

## WOS/DAILY SCHEDULE INTERFACE

### Target Productivity Worksheet

	SAT	SUN	MON	TUE	WED	THUR	FRI	TOTAL
WALK-IN-REVENUE			\$5,482	\$4,828	\$4,758	\$3,848	\$4,581	\$23,496.21
WOS DAILY WORKHOURS			22.2	16.4	15.6	15.5	17.1	86.8
DAILY TARGET PRODUCTIVITY			\$246.92	\$294.39	\$304.97	\$248.27	\$267.89	\$270.69
NEGOTIATED PRODUCTIVITY			\$228.04	\$271.88	\$281.66	\$229.29	\$247.41	\$250.00



# WOS/DAILY SCHEDULE

## WOS/DAILY SCHEDULE INTERFACE

### WORKHOURS

		VAR. TO ACT.
ACTUAL	90	
PROJECTED	93	-3
PLAN	111	-21
SPLY	115	-25

### REVENUE

		VAR. TO ACT
ACTUAL	\$22,941.08	
PROJECTED	\$22,465.14	\$476
PLAN	\$24,750.00	-\$1,809
SPLY	\$21,810.82	\$1,130

### REV. PER WORKHOUR

		VAR. TO ACT
ACTUAL	\$254.19	
TARGET	\$300.00	-\$45.81
PLAN	\$222.97	\$31.22
SPLY	\$189.66	\$64.54

	SAT	SUN	MON	TUE	WED	THUR	FRI	TOTAL
SPLY Walk-in Revenue			\$5,147	\$4,320	\$4,246	\$3,685	\$4,413	\$21,811
% Variance SPLY			3.00%	3.00%	3.00%	3.00%	3.00%	3.00%
Projected revenue			\$5,302	\$4,449	\$4,373	\$3,796	\$4,545	\$22,465
Projected workhours			19	14	13	14	15	75
Productivity			\$274	\$326	\$338	\$275	\$297	\$300

	SAT	SUN	MON	TUE	WED	THUR	FRI	TOTAL
Actual Workhours			22.50	17.00	15.25	18.00	17.50	90.25
Actual Revenue			\$5,456	\$4,092	\$4,252	\$4,126	\$5,015	\$22,941
Actual Productivity			\$243	\$241	\$279	\$229	\$287	\$254







# **WOS/DAILY SCHEDULE**

## **WOS/DAILY SCHEDULE INTERFACE**

### **DAILY SCHEDULE BENEFITS**

- **Matches Staffing to Customer Demand**
  - **Schedules Clerks in 1/2 Hour Time Increments**
  - **Tracks Workhours and Productivity Daily**
  - **Reinforces Daily and Weekly Goals**
  - **WOS Data to predict customer Flow**
-



# **WOS/DAILY SCHEDULE**

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## **WOS PRE-EXIT CONFERENCE**

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### **Pre- Exit Conference**

- **Who must Attend**
  - **Purpose/Objective to be realized**
-



# **WOS/DAILY SCHEDULE**

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## **WOS PRE-EXIT CONFERENCE**

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### **Desired Attendees**

- **Retail Manager**
  - **MPOO/Host City Postmaster**
  - **WOS Team Leader**
-



# **WOS/DAILY SCHEDULE**

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## **WOS PRE-EXIT CONFERENCE**

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### **Purpose**

- **Discuss results of the WOS Survey**
  - **Discuss analysis and observations**
  - **Explain WOS/Daily Schedule relationship**
  - **Explain target productivity**
  - **Confirm the Exit Conference date and time**
-



# **WOS/DAILY SCHEDULE**

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## **WOS EXIT CONFERENCE**

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### **Exit Conference**

- **Who must Attend**
  - **Purpose/Objective to be realized**
-



# **WOS/DAILY SCHEDULE**

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## **WOS EXIT CONFERENCE**

---

### **Desired Attendees**

- **Postmaster /Unit Manager**
  - **District Retail Manager**
  - **MPOO**
  - **WOS Team Leader**
  - **Supervisor**
-



# **WOS/DAILY SCHEDULE**

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## **WOS EXIT CONFERENCE**

---

### **Purpose**

- **Discuss results of the WOS Survey**
  - **Discuss analysis and observations**
  - **Explain WOS/Daily Schedule relationship**
  - **Explain target productivity**
  - **Complete action plan**
-





# **WOS/DAILY SCHEDULE**

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## **WOS FOLLOW-UP**

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### **Follow-up**

- **Purpose**
  - **Tools**
  - **Timeframes**
-



# **WOS/DAILY SCHEDULE**

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## **FOLLOW-UP AND EVALUATIONS**

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### **PURPOSE**

- **Ensure Service Standards are Met**
  - **Verify Action Plans are Implemented**
  - **Ensure Target Productivity is Accomplished**
  - **Identify issues preventing success**
-



# **WOS/DAILY SCHEDULE**

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## **FOLLOW-UP AND EVALUATIONS**

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### **TOOLS**

- **Ease of Use Index**
    - **Waiting Time in Line**
    - **Waited in Line More than 5 Minutes**
  
  - **Mystery Shopper**
    - **Operational Efficiency (wait time in line)**
  
  - **Workhour Performance reports**
-



# **WOS/DAILY SCHEDULE**

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## **FOLLOW-UP AND EVALUATIONS**

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### **Timeframes**

- **14 day**
    - **On-site observation**
    - **Weekly FLASH**
    - **Weekly Recap Sheet**
  - **30 day**
    - **Weekly Recaps**
    - **FLASH**
    - **Mystery Shopper/EOU**
  - **Ongoing as necessary**
-



# **WOS/DAILY SCHEDULE**

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## **Review**

- **Pilot Performance**
  - **WOS Overview**
  - **WOS/Daily Schedule Interface**
  - **Pre-Exit/Exit Conference**
  - **Follow-up**
-



# **WOS/DAILY SCHEDULE**

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## **WOS TRAINING AVAILABLE**

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**Training is 3 days (2 days classroom and 1 day onsite at unit).**

### **Training Dates Available:**

**Week of:**

- **August 14**
  - **August 21**
  - **August 28**
  - **September 4**
-