

# American Postal Workers Union, AFL-CIO

Telephone  
(202) 842-4246

## Memorandum

1300 L Street, NW  
Washington, DC 20005



From the Office of WILLIAM BURRUS  
President

August 4, 2010

TO: **Rob Strunk**

SUBJECT: **USPS Notification of Upcoming Changes to Forms 4000-A (Retail Lobby Observation) & 4000-B (Retail Employee Observation) (Notification No. N19C20100432)**

Please find attached a copy of a letter dated 7/30/2010 from John Dockins, regarding the above reference matter.

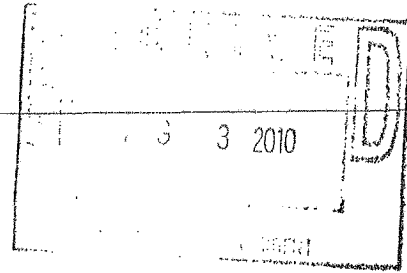
You are designated as the APWU contact person in this matter. Contact the USPS representative as soon as possible for discussion, if appropriate. Please provide notification of your review to me by 9/6/2010.

Please note: Your secretary should update the Notification Tracking Module in Step 4 CAS as necessary.

Attachment

WB:ibb  
opelu #2/afl-cio

LABOR RELATIONS



July 30, 2010

Mr. William Burrus  
President  
American Postal Workers Union  
(APWU), AFL-CIO  
1300 L Street NW  
Washington, DC 20005-4304

Certified Tracking Number:  
7099 3400 0009 0835 5479

Dear Bill:

Pursuant to Article 19 of the Collective Bargaining Agreement, this letter serves as notification of upcoming changes to Forms 4000-A (Retail Lobby Observation) and 4000-B (Retail Employee Observation).

The following documents are provided:

- The current version of Forms 4000-A and 4000-B.
- A draft copy, marked-up copy of the proposed revisions to Forms 4000-A and 4000-B.
- A memorandum from the manager requesting the change identifying the purpose and impact of the proposed revisions, attaching a narrative explanation (matrix) of each proposed revision.

If there are any questions concerning these changes, please contact Patrick Devine of my staff at (202) 268-5421.

Sincerely,

A handwritten signature in black ink, appearing to read "John W. Dockins".

*fs*  
John W. Dockins  
Manager  
Contract Administration (APWU)

Enclosures

### **Retail Lobby Observation PS Form 4000-A Updated:**

The Retail Lobby Observation PS Form 4000-A is a total retail facility observation form to evaluate, observe, and record retail employee performance when interacting with customers. The observation will determine if retail products are displayed in the lobby area and available for customer convenience. Observers will determine if the lobby displays the current promotional signage. Additionally, the observer will evaluate lobby cleanliness, both interior and exterior, and use the observation as a guide to make the necessary improvements to project a positive image with our customers.

Retail Lobby Observation Top Section will record Office Name, District, Employee Name, Reviewer Name, Date Observed and FY and Month. This section remains unchanged from the previous PS Form 4000-A, January 2004.

### **Wait Time in Line Section:**

(New Added Section).

The Wait Time in Line section replaces the "Operational Efficiency (1-3) section on the previous 4000-A, January 2004. This section replaces Q1 with "*Did the customer wait in line 5 minutes or less?*" Both minutes and seconds are recorded. Q2 (formerly part of Q1 on the former evaluation) reads, "*How many customers were in line ahead of the customers you were observing?*" Since vending has been removed, Q3 on the former 4000-A has been eliminated. A new question (Q3), "*How many workstations were open?*" and Q4, "*How many workstations were available?*" have been added. Additionally, a new Q5 has been added, "*Were there any employees assisting customers in the lobby area or from behind the counter prior to the customer reaching the counter?*"

### **Hazmat Section:**

(Originally listed as Question 4 in PS Form 4000-A, January 2004).

Hazmat section Q6 is updated to read, "*Did the employee ask whether the item/article contained anything Fragile, Liquid, Perishable, or Potentially Hazardous? Please circle all that apply. Fragile\_\_\_\_\_ Liquid\_\_\_\_\_ Perishable\_\_\_\_\_ Potentially Hazardous\_\_\_\_\_.*"

### **Product Offering Section:**

(New Section replaces former Sales Skills/Product Knowledge (Q5 – Q13) in PS Form 4000-A, January 2004 with Q7-12 in new Product Offering Section.

Eliminated in the former Sales Skills/Product Knowledge Section (2004) are:

Former Q5. "*Did the employee ask when the item needed to arrive OR offer Express Mail or Priority Mail Services, AND state service standards?*"

Replaced with Q7 "Did the employee offer a mail class? Specify the mail class(es) that were offered by employee. Circle all that apply. (Express Mail, Priority Mail, Other.)"

Former Q7. "Did the employee offer the correct class of mail?" and Q8 "Did the employee explain any features of the recommended class of mail?" were replaced with Q8, "Did the employee offer Express Mail (by name) first before any other mail class? If no, specify the class of mail offered first: \_\_\_\_\_. Did the employee explain both the tracking and insurance features of Express Mail?" AND Q9 "Did the employee offer Priority Mail (if Express Mail was declined or not offered) by name?"

Former Q9, "Did the employee offer any special services?" and former Q10, "If Yes, specify the services offered?" (Certified, Insured, Return Receipt, Proof of Mailing, Delivery Confirmation, Signature Confirmation, Other) along with former Q11, "Did the employee explain or offer to explain any features of the recommended special services?" have been combined and replaced with Q10, "Did the employee offer Insurance and Delivery Confirmation or any extra services by name? If "Yes," specify the extra services offered by circling all that apply. (Delivery Confirmation, Insurance, Signature Confirmation, Certified Mail, Return Receipt, Other). Did the employee explain any features of the extra services offered to the customer? If "Yes" specify the extra services offered by circling all that apply." (Delivery Confirmation, Insurance, Signature Confirmation, Certified Mail, Return Receipt, Other).

Former Q12, "Did the employee suggest an additional item to the purchaser?" and former Q13, "Specify additional items offered?" have been combined and replaced with Q11, "Did the employee suggest any additional items to the customer? (Stamps, Packaging/Shipping Supplies, Post Office Box Rentals, Passports, or Money Orders.). If "yes," circle all the service(s) offered by the employee. (Money Order, Passport, PO Box Rental, ReadyPost, Stamps, Other).

Q12 has been added, "Did the employee provide or offer a receipt without the customer asking for it?"

#### **Product Explanation Section:**

(New Section replaces former Sales Skills/Product Knowledge (Q5 – Q13) in PS Form 4000-A, January 2004 with Q13-15 in Product Explanation Section.

New questions are:

Q13 "When Express Mail was offered, did the employee mention that Insurance and Tracking are included?"

Q14 "Did the employee explain the features or benefits of Priority Mail? Specify the feature or benefit that was explained? (i.e., Flat Rate, 2-3 Days, Free Packaging, More affordable than most of our competitors. Other)."

Q15 "Did the employee explain any features of the extra services offered to the customer? If "Yes," specify the extra services offered by circling all that apply."

*(Delivery Confirmation, Insurance, Signature Confirmation, Certified Mail, Return Receipt, Registered).*

**Promotion and Merchandising Section:**

(This section replaces the Retail Products and Services (20-12) section as listed in PS Form 4000-A, January 2004).

Former Q20 *"Check the items that were not available in the lobby (Certified Mail Forms, Insured Mail Forms, Delivery Confirmation labels, Domestic Return Receipt, Priority Mail Envelopes, Express Mail Envelopes, International Supplies, Signature Confirmation labels and Other)"* is replaced by Q16 *"Where you able to locate the Extra Service Forms in the lobby? If yes circle all that apply. (Delivery Confirmation, Insurance, Signature Confirmation, Certified Mail, Return Receipt)."*

Former Q21 *"Were packaging supplies displayed and professionally labeled?"* is replaced by Q17 *"Are Ready Post retail packaging/shipping supplies prominently displayed and fully stocked in the full service area?"*

Additional added questions are Q19 *"Are Continuity and Promotional menu boards displayed side-by-side, directly above or behind the retail counter?"* AND Q20 *"Are Promotional POP menu boards for the current time period the ONLY ones displayed?"*

**Image Section:**

(New Section replaces former Courtesy and Professionalism (14-16) section and former Facility (22-24) questions in the PS Form 4000-A, January 2004).

Former Q14 *"Did the employee pleasantly greet the customer when the customer reached the counter?"* along with former Q16 *"Did the employee end the transaction in a pleasant manner?"* AND former Q18 *"Did the employee(s) serving other customers appear to interact in a pleasant and courteous manner?"* have been replaced by Q21 *"Did the employee greet the customer pleasantly, make eye contact at the beginning of the transaction, and end the transaction in a pleasant manner?"*

Former Q17 *"Did the employee pay attention to the customer during the entire transaction?"* is replaced by Q22 *"Was the employee attentive during the entire transaction?"*

Former Q15 *"Was the employee wearing the complete uniform?"* remains unchanged and is now listed as Q23.

Former Facility Q23 *"Were all signs professionally lettered and properly posted?"* has been replaced with Q26 *"Were all signs and displays professional in appearance, including posting and lettering? If no, specify the problem."*

Former Courtesy and Professionalism Q19 *"Was the interior (including counters, floors, walls, windows, ceiling) neat, clean and well-maintained, and trash cans not*

*overflowing?*” has been slightly modified and replaced with Q27 *“Is the interior neat, clean and well maintained (including counters, floors, walls, windows, ceiling) and trash cans not overflowing? If not, specify.”*

Former Facility Q22 *“Was the exterior (including doors, landscaping, etc.) neat, clean and well maintained?”* is unchanged and now listed as Q30 under Image.

The question *“Ended the transaction in a pleasant manner?”* remains unchanged from the previous PS Form. Additionally, *“Provided a receipt to the customer without having one requested?”* remains the same.

Former Q24 *“Was the employee workstation neat and clean?”* has been eliminated from the new observation form.

An additional section to document local observations has been included on the PS Form 4000-A.

## EMPLOYEE OBSERVATION

OFFICE NAME	ZIP CODE:	OBSERVER:
EMPLOYEE NAME:	DATE:	TIME:

### WAIT TIME IN LINE

Wait Time In Line (If over 5 minutes, provide comments):

# OF CLERKS WORKING	# OF PEOPLE IN LINE			
	Start:	Start:	Start:	Start:
	Stop:	Stop:	Stop:	Stop:
	PKG TRANX 1 (Y/N)	PKG TRANX 2 (Y/N)	PKG TRANX 3 (Y/N)	PKG TRANX 4 (Y/N)
Greeted customer pleasantly and made eye contact.				
ITEM MAILED (LETTER, LARGE ENVELOPE, PARCEL)				

### HAZMAT

Hazmat question asked in full? If no, take immediate action to hold discussion with employee/supervisor.				
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### PRODUCT OFFERING

Express Mail Offered FIRST?				
Insurance and Tracking Included with Express Mail Offer?				
Explained the benefits of Insurance and Tracking?				
Priority Mail offered next?				
Special Services Offered?				
Indicate which of the following Spec. Serv. were offered: Delivery Confirmation, Signature Confirmation, Insurance, certified, return receipt?				
Additional Items Offered? (Must be in addition to or other than stamps) Circle all items offered below:				
Packaging Products - PO Box - Money Order - Passport				
If Priority Mail destined for Zones 5 thru 8, did the employee measure for DIM weight postage?				
Was DIM Weight Postage Applied? If not, why not?				
If DIM Weight shop and correct postage was not collected, was DIM Weight reviewed with the employee as soon as possible?				

### PRODUCT EXPLANATION

Were the benefits/features for Express Mail explained? (i.e. Next Day Delivery, Free packaging, quickest delivery.)				
Were the benefits/features for Priority Mail Explained? (i.e. Flat Rate, 2-3 Days, Free packaging, more affordable than competitors.)				
Were the benefits/features for the Special Services Explained? Indicate which Spec. Serv. Included any explanation.				

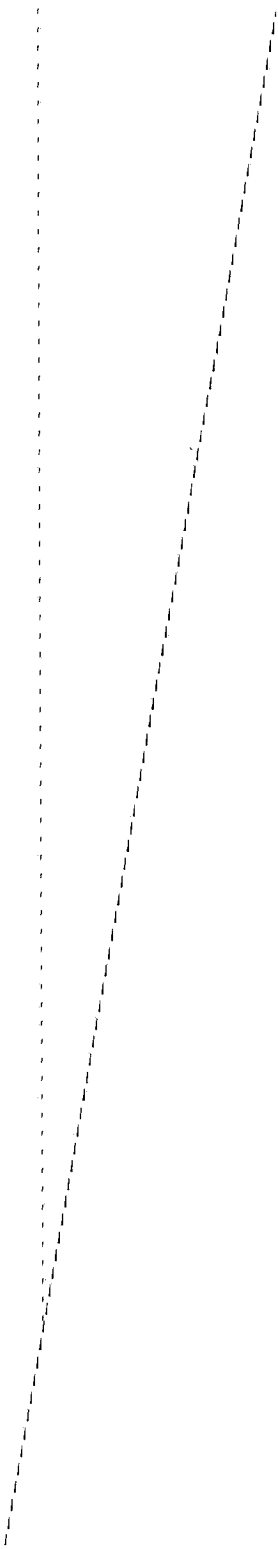
### OTHER

Was the employee wearing the complete uniform (ie, shirt & tie, or polo shirt, name tag)				
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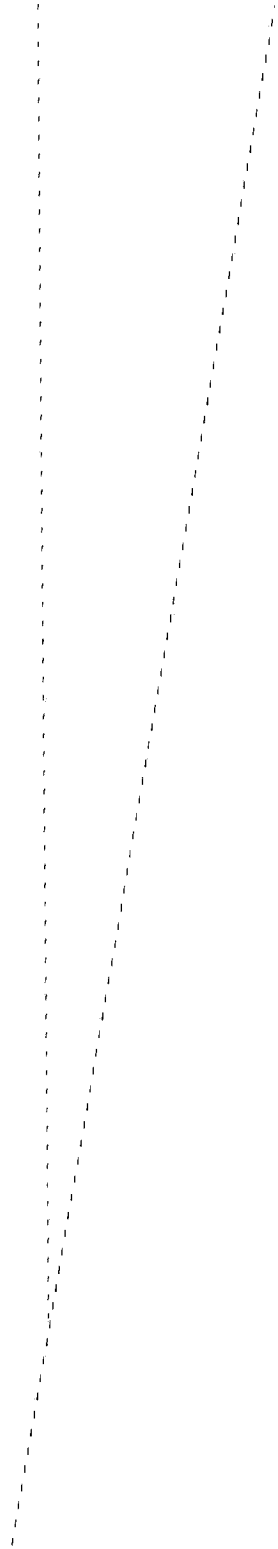
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Was the employee attentive during the entire transaction?				
Ended the transaction in a pleasant manner?				
Provided a receipt to the customer without having one requested?				
What actions will be taken to improve the areas that show deficiencies?				
Employee Comments:				
EMPLOYEE SIGNATURE (Date)			OBSERVER SIGNATURE (Date)	

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# Retail Employee Observation

Use this form to evaluate the retail employee's level of sales skills and product knowledge. It does not necessarily reflect the items on the Mystery Shopper Survey.

Employee Name	Office Name
Observer Name	ZIP Code®
	Date
	Time

On \_\_\_\_\_ you were observed by \_\_\_\_\_.

The customer you waited on mailed:

*(The product[s] or service[s] rendered are identified in blocks A. - E.)*

A.	B.	C.	D.	E.	Check marks show actions that were observed. Note: items 2 - 5.
					1. Greet customer pleasantly and make eye contact.
					2. Ask, "Does the parcel (item, article) contain anything liquid, fragile, perishable, or potentially hazardous?"
					Only for letters or packages presented at time of mailing.
					4. Explain features of the class(es) of mail offered.
					5. Offer insurance and Delivery Confirmation™.
					6. Explain or offer to explain features of special services offered.
					7. Suggest an additional item to purchase in addition to, or other than stamps.
					8. Provide receipt without customer having to request it.
					9. Remain attentive during entire transaction.
					10. End transaction in pleasant manner.

Observer's Comments

Observer's Signature	Observer's Title
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Supervisor's Action Taken

Supervisor's Signature	Date	Employee's Signature	Date
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## Instructions

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The purpose of an employee observation is to:

Record the level of employee's sales skills and product knowledge. It serves as a communication tool between management and the retail clerk/sales associate. Perform an employee observation at least once per month, per retail clerk. Observe interactions between the retail clerk and five consecutive customers.  
NOTE: Units not meeting targets should provide more frequent observations.

Management reviews results of the observation with the clerk within 24 hours.

- Compare the employee's performance with previous observations.
- Congratulate the clerk for a job well done if achieves 100% or meets local sales skills goal. Local recognition programs are encouraged.
- If not met, coach employee on ways to improve knowledge and performance.
- When accepting a parcel, refer to **hazardous mail** acceptance procedures.
- File at unit for two years.

## **Retail Employee Observation PS Form 4000-B Updated:**

The Retail Employee Observation PS Form 4000-B is a communications tool used by management to observe and record retail employee performance when employees are interacting with customers. Management will use the 4000-B to identify opportunities for recognition and/or training and coaching if local hazmat, product offering and product explanation targets are not being met.

Employee Observation Top Section to record Office Name, Employee Name, Date, ZIP Code, Observer, and Time remains unchanged. Format changed slightly.

### **Wait Time in Line:**

(New Added Section).

4000-B has been updated to include a section for comments captured if wait time exceeds 5 minutes. Form identified number of Clerks Working and number of customers in line. Both Start (entering line) and Stop times (served by clerk) will be recorded. Form identifies item being mailed (letter, large envelope or parcel). Observation captures if clerk greeted customer pleasantly and made eye contact.

### **Hazmat Section:**

(Originally listed as Question 2 in PS Form 4000-B, October 2005).

Section updated to be separate from Product Offering and Product Explanation questions. Evaluators are instructed to take immediate action to hold discussion with employee's supervisor if clerk fails to ask mandatory Hazmat question to customer. USPS is required by FAA to ask this question on all mailing flats or small-large packages.

### **Product Offering Section:**

(New Section replaces Q3 – Q7 in PS Form 4000-B, October 2005).

Express Mail and Priority Mail Offering questions are now separate questions as compared to the prior PS-Form 4000-B (October 2005) Q3 which read "*Offer Express Mail or Priority Mail and state the service standard.*" Clerks must offer Express Mail First since Express Mail is our premier product. Clerks must offer insurance and tracking with the Express Mail Offer and explain the benefits of insurance and tracking since focus group findings have shown customers are not aware of our features and benefits. This change replaces question #4 "*Explain features of the class(es) of mail offered.*" as listed on the prior PS Form- 4000-B, October 2005.

Priority Mail is the second offering to customers along with an offering of Extra Services to include Delivery Confirmation, Signature Confirmation, Insurance, Certified, and Return Receipt. This offering replaces Q5-6 on the prior PS-Form 4000B.

Additional Items offered include stamps, packaging products, PO Boxes, Money Orders and Passport. Clerks must state the name of the additional items offered. This replaces Q7 "Suggest an additional item to purchase in addition to or other than stamps" on the Oct. 2005 PS-Form 4000-B.

Dimensional Weight shops are included to determine if clerks are capturing the revenue the Postal Service pays for in transportation costs. The previous Form did not include observations on DIM Weight. Observation questions include "If Priority Mail destined for Zones 5 thru 8, did the employee measure for DIM Weight postage?" and "Was DIM Weight Postage Applied? If not, why not?" Additionally, observers will answer the question, "If DIM Weight shop and correct postage was not collected, was DIM Weight reviewed with the employee as soon as possible?"

**Product Explanation Section:**

(New Section replaces Q4 & Q6 in PS Form 4000-B, October 2005).

Previous question "Explain features of the class(es) of mail offered" have been replaced with "Were the benefits/features for Express Mail explained? (i.e. Next Day Delivery, Free packaging, quickest deliver). Both Express and Priority Mail questions are separate. If reference to Priority Mail the new questions reads, "Were the benefits/features for Priority Mail explained? (i.e. Flat Rate, 2-3 Days, Free packaging, more affordable than competitors). For Extra Services question, "Were the benefits/features for the Extra Services explained? Indicate which Extra Services included any explanation." This question "Explain or offer to explain features of special services offered." replaces Q6 on the October 2005 PS-Form 4000-B.

**Other Section:**

(New Section replaces Q8 – Q10 in PS Form 4000-B, October 2005).

A new question has been added to observe "Was the employee wearing the complete uniform (i.e. shirt & tie, or polo shirt, name tag)?"

A replacement question "Was the employee attentive during the entire transaction?" replaces the older Q9 that reads, "Remain attentive during the entire transaction?"

The question "Ended the transaction in a pleasant manner?" remains unchanged from the previous PS Form. Additionally, "Provided a receipt to the customer without having one requested?" remains the same.

New question to this section includes feedback on the observer's plans to correct deficiencies. The question reads, "What actions will be taken to improve the areas that show deficiencies?"

Both the Employee and the Observer will sign the observation PS-Form 4000-B.

United States Postal Service      FY      Month      Date Observed:

**Retail Lobby Observation**

The purpose of a lobby observation is to review the total retail facility. This form may be completed by local, district, area, or headquarters managers or their designee. Complete this form at least once a month.

Office Name: \_\_\_\_\_ Postmaster/Manager Name: \_\_\_\_\_

District: \_\_\_\_\_ Reviewer Name: \_\_\_\_\_

No.	Checklist	Y	N	N/A	Comments	Date Addressed
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**Wait Time in Line (1-5)**

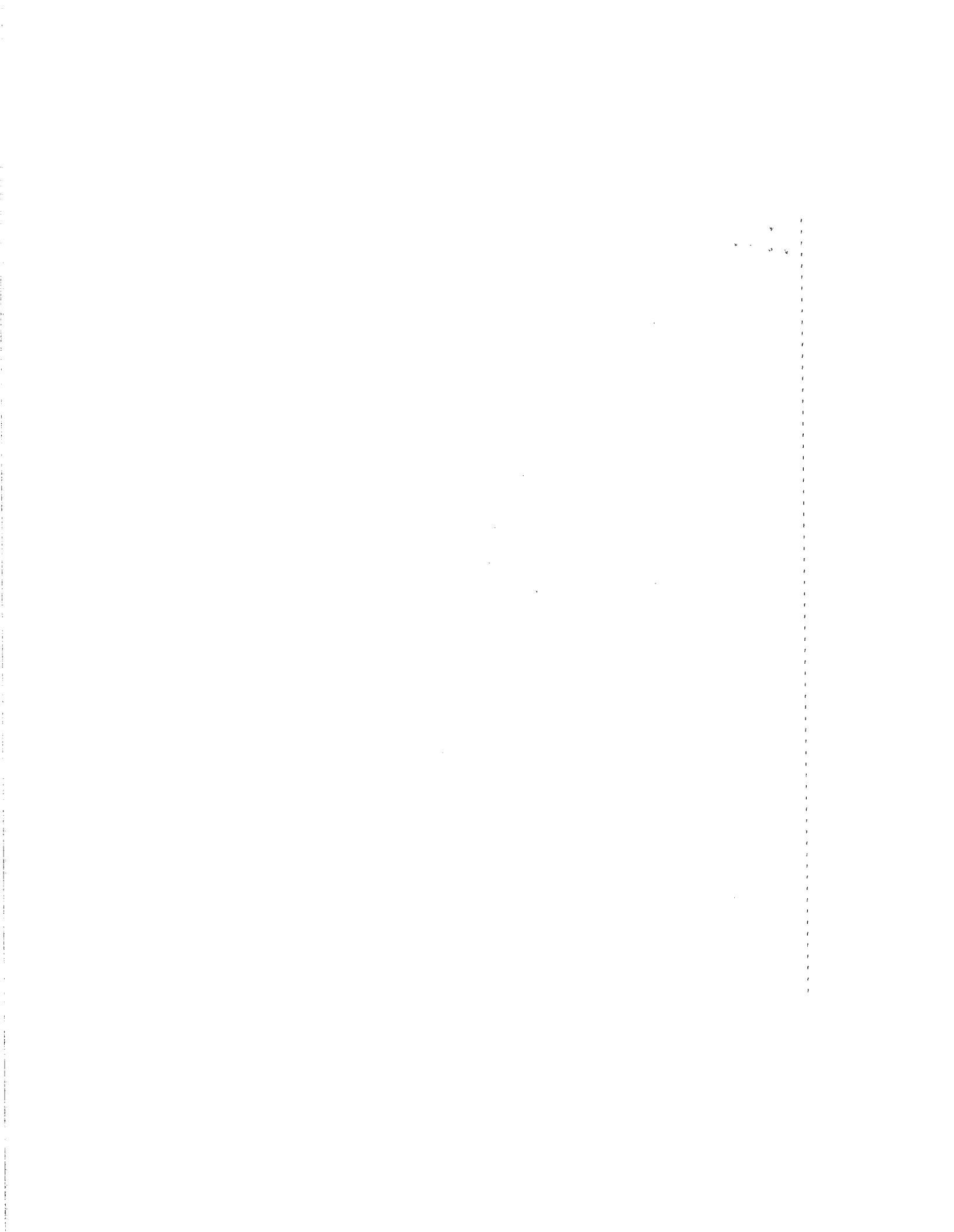
1	Did the customer wait in line 5 minutes or less? Min: _____ Sec: _____					
2	How many customers were in line ahead of the customer you were observing? _____					
3	How many workstations were open? _____					
4	How many workstations were available? _____					
5	Were there any employees assisting customers in the lobby area or from behind the counter prior to the customer reaching the counter?					

**Hazmat (6)**

6	Did the employee ask whether the item/article contained anything Fragile, Liquid, Perishable, or Potentially Hazardous? Please circle all that apply.					
	Fragile      Liquid					
	Perishable      Potentially Hazardous					

**Product Offering (7-11)**

7	Did the employee offer a mail class? Specify the mail class(es) that were offered by employee. Circle all that apply. Express Mail    Priority Mail    Other: _____					
8	Did the employee offer Express Mail (by name) first before any other mail class? If no, specify the class of mail offered first: _____					
	Did the employee explain both the tracking and insurance features of Express Mail?					
9	Did the employee offer Priority Mail (if Express Mail was declined or not offered) by name?					
10	Did the employee offer Insurance and Delivery Confirmation or any extra services by name? If "Yes," specify the extra services offered by circling all that apply.					
	Delivery Confirmation    Insurance    Signature Confirmation					
	Certified Mail    Return Receipt    Other: _____					
	Did the employee explain any features of the extra services offered to the customer? If "Yes," specify the extra services offered by circling all that apply.					
	Delivery Confirmation    Insurance    Signature Confirmation					
	Certified Mail    Return Receipt    Other: _____					
11	Did the employee suggest any additional items to the customer? (Stamps, Packaging/Shipping Supplies, Post Office Box Rental, Passports, or Money Orders.) If "Yes," circle all the service(s) offered by the employee.					
	Money Order    Passport    PO Box Rental					
	Ready Post    Stamps    Other: _____					
12	Did the employee provide or offer a receipt without the customer asking for it?					





**Product Explanations (13-15)**

13	When Express Mail was offered, did the employee mention that Insurance and Tracking was included?				
14	Did the employee explain the features or benefits of Priority Mail?				
	Specify the feature or benefit that was explained? (ie, Flat Rate, 2-3 Days, Free Packaging, More affordable than most of our competitors, Other)				
15	Did the employee explain any features of the extra services offered to the customer? If "Yes," specify the extra services offered by circling all that apply.				
	Delivery Confirmation    Insurance    Signature Confirmation Certified Mail    Return Receipt    Registered				

**Promotion and Merchandising (16-20)**

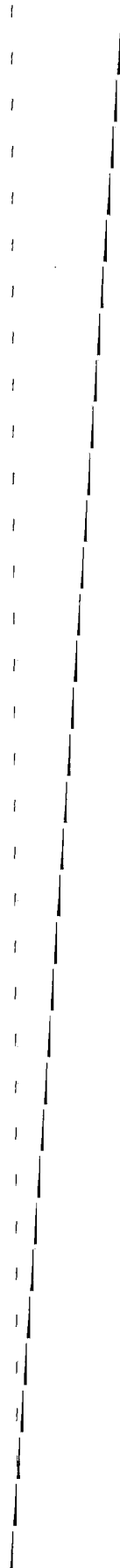
16	Were you able to locate the Extra Service Forms in the lobby? If yes circle all that apply.				
	Delivery Confirmation    Insurance    Signature Confirmation Certified Mail    Return Receipt				
	Are Ready Post retail packaging/shipping supplies prominently displayed and fully stocked in the full service area?				
18	Are complimentary expedited shipping supplies (Express Mail & Priority Mail) at APC?				
	Are complimentary expedited shipping supplies displayed and available in the full service and lobby area?				
19	Are Continuity and Promotional menu boards displayed side-by-side, directly above or behind the retail counter?				
20	Are Promotional POP menuboards for the <i>current time period</i> the <b>ONLY</b> ones displayed?				

**Image (21-28)**

21	Did the employee greet the customer pleasantly, make eye contact at the beginning of the transaction, and end the transaction in a pleasant manner.				
22	Was the employee attentive during the entire transaction?				
23	Was the employee wearing the complete uniform (i.e., shirt & tie or polo shirt, and name badge)?				
26	Were all signs and displays professional in appearance, including posting and lettering? If no specify the problem.				
27	Is the interior neat, clean and well maintained (including counters, floors, walls, windows, ceiling) and trash cans not overflowing? If not, specify.				
30	Is the exterior (including doors, landscaping, etc.) neat, clean and well maintained?				

**Local Observations**


Instructions



The purpose of a lobby observation is to review the total retail environment which includes: Wait Time in Line, HAZMAT, Product Offering and Product Explanations, Promotion and Merchandising, and Image. Actions on the lobby observation will result in additional revenue opportunities and increased customer satisfaction. This form may be completed by local, district, area, or headquarters managers or their designee. A district staff member may also complete this form and share results with unit manger. At a minimum, this form must be completed once a month. Units not meeting targets, should perform observations more frequently. If not met, coach employees on ways to improve knowledge and performance.

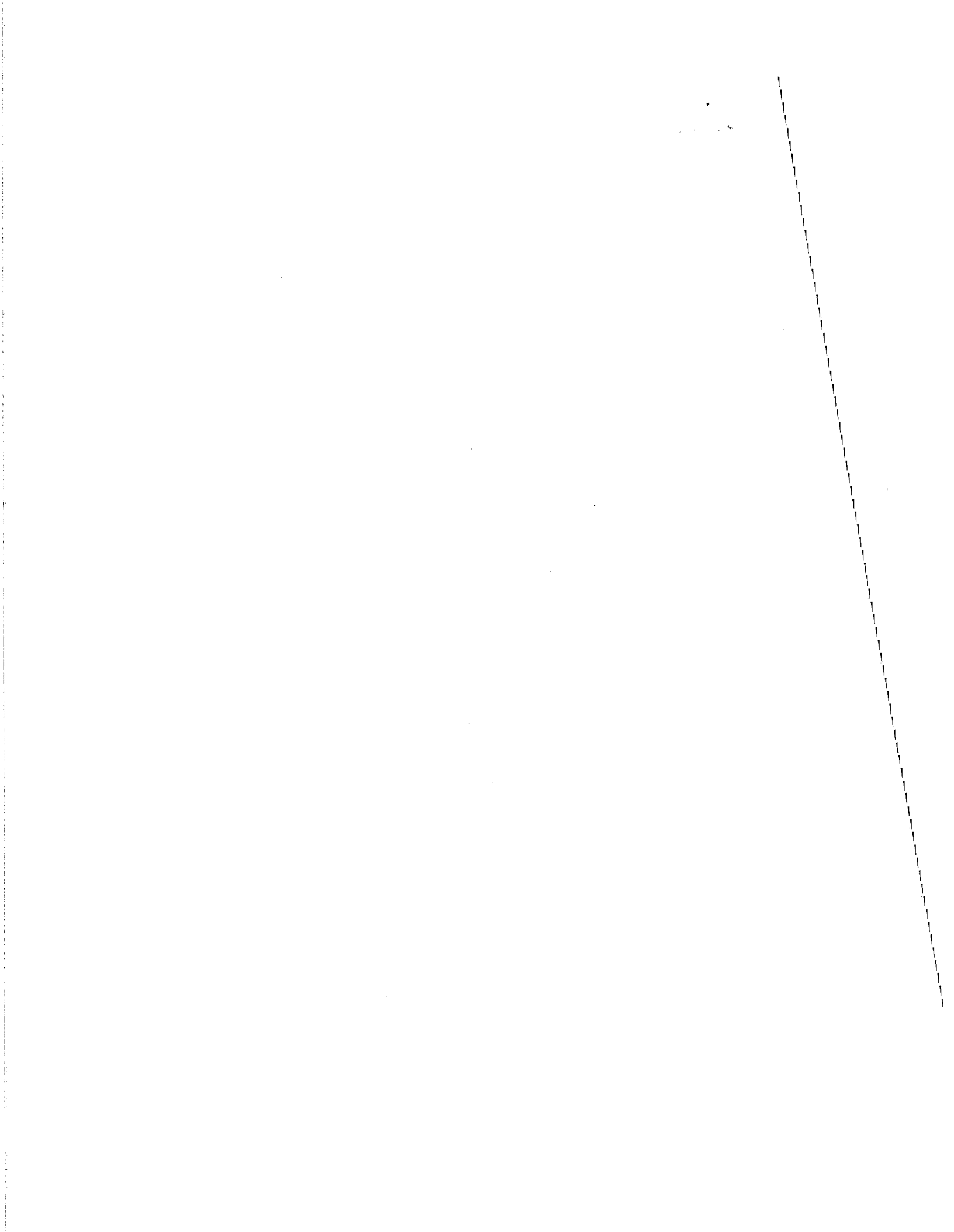
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PS Form 4000-A, February 2009 (Page 2 of 2)

This form is available on the Intranet at [blue.usps.gov](http://blue.usps.gov)

Original: Keep locally

Provide copies to: District Retail Manager



United States Postal Service®  
**Retail Lobby Observation**

FY \_\_\_\_\_ Month \_\_\_\_\_ Date Observed \_\_\_\_\_

The purpose of a lobby observation is to review the total retail facility. This form may be completed by local, district, area, or headquarters managers. Retain for two years. Complete this form at least once every month.

Office Name	Postmaster/Manager Name
District	Reviewer Name

No.	Checklist	Y	N	N/A	Comments	Date Addressed
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**Operational Efficiency (1-3)**

1.	Did you wait in line five (5) minutes or less? If "No," how long did you wait? _____ How many service counters were open? _____					
2.	Did vending machines appear to be in proper working order?					
3.	Were all vending machines fully stocked with no "Sold Out" signs? (All slots must have been full and not have required exact change.)					

**Hazmat (4)**

4.	Did the employee follow the standard procedure to determine if item accepted meets HAZMAT regulations?					
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**Sales/Skills/Product Knowledge (5-13)**

5.	Did the employee ask when the item needed to arrive OR offer Express Mail® or Priority Mail® Services, AND state service standards?					
6.	Specify class(es) of mail offered: <input type="checkbox"/> Express Mail <input type="checkbox"/> Priority Mail <input type="checkbox"/> Other: _____					
7.	Did the employee offer the correct class of mail?					
8.	Did the employee explain any features of the recommended class of mail?					
9.	Did the employee offer any special services?					
10.	If "Yes," specify the services offered: <input type="checkbox"/> Certified Mail <input type="checkbox"/> Proof of Mailing <input type="checkbox"/> Signature Confirmation™ <input type="checkbox"/> Insured Mail <input type="checkbox"/> Other: _____ <input type="checkbox"/> Return Receipt <input type="checkbox"/> Delivery Confirmation™					
11.	Did the employee explain or offer to explain any features of the recommended special services?					
12.	Did the employee suggest an additional item to the purchaser?					
13.	Specify additional items offered:					

**Courtesy and Professionalism (14-19)**

14.	Did the employee pleasantly greet the customer when the customer reached the counter?					
15.	Was the employee wearing the complete uniform?					
16.	Did the employee end the transaction in a pleasant manner? If "No," what was said (Specify): _____					
17.	Did the employee pay attention to the customer during the entire transaction?					
18.	Did the employee(s) serving other customers appear to interact in a pleasant and courteous manner?					
19.	Was the interior (including counters, floors, walls, windows, ceiling) neat, clean and well-maintained, and trash cans not overflowing?					

**Retail Products and Services (20-21)**

20.	Check the items that were NOT available in the lobby: <input type="checkbox"/> Certified Mail Forms <input type="checkbox"/> Express Mail Envelopes <input type="checkbox"/> Insured Mail Forms <input type="checkbox"/> International Supplies <input type="checkbox"/> Delivery Confirmation Labels <input type="checkbox"/> Signature Confirmation Labels <input type="checkbox"/> Domestic Return Receipt <input type="checkbox"/> Other: _____ <input type="checkbox"/> Priority Mail Envelopes					
21.	Were packaging supplies displayed and professionally labeled?					

**Facility (22-24)**

22.	Was the exterior (including doors, landscaping, etc.) neat, clean and well maintained?					
23.	Were all signs professionally lettered and properly posted?					
24.	Was the employee workstation neat and clean?					

## Instructions

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The purpose of a lobby observation is to review the total retail environment. This includes:

- Operational efficiency;
- Sales skills / Product knowledge;
- Courtesy and professionalism;
- Retail products and services; and
- Facility condition.

Actions on the lobby observation will result in additional revenue opportunities and increased customer satisfaction.

Management or designee completes this form.

A District staff member may also complete this form and share the results with the unit management.

File at unit and retain for two years.

DEAN J. GRANHOLM  
Vice President  
RETAIL AND PART OFFICE OPERATIONS



December 22, 2010

VICE PRESIDENTS, AREA OPERATIONS

SUBJECT: Retail Customer Experience Evaluation Changes

As all of you are aware, we currently use the Perfect Transaction workflow when engaging the customer in our retail lobbies. The questions are designed to allow clerks to match products and services to meet specific customer needs. The results of these questions are reported to us in the Retail Customer Experience (RCE) report categories of Product Explanation and Product Offering.

I am convinced that after literally years of asking these questions and evaluating the category metrics, we need to revisit the logistics of these two categories. I still believe the Perfect Transaction workflow is necessary. I also have great confidence in our Sales and Service Associates' (SSA) knowledge of postal products, as well as the needs of their most frequent customers and their ability to sell to those needs.

I also believe that our SSAs are aware of the company's financial situation and trust them to continue to make the necessary decisions to protect revenue and continue to grow the business. Therefore, beginning in Postal Quarter II, SSAs are not required to use the Perfect Transaction, and instead can customize the questions to best address individual customer needs.

This small change benefits our SSAs, our customers, and will continue to help us address Wait Time In Line issues. Those scores improved again in Quarter I, up four percentage points. A full 84 percent of our customers wait less than five minutes in line. Streamlining the questions also is a customer convenience and a small way of recognizing their continued support of the Postal Service.

Further, beginning with Postal Quarter II, the Product Offerings and Product Explanation categories will be removed from the RCE evaluation scoring. The HAZMAT question will still be required for an entire customer visit, but not for each individual package.

Finally, the weights of the four remaining RCE categories will be revised as depicted in the attachment.

Please ensure all Districts are made aware of this decision and Happy Holidays to all.

A handwritten signature in black ink, appearing to read "Dean Granholm".

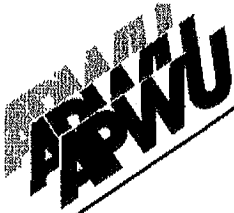
Dean Granholm

Attachment

475 L EIGHTH PLAZA SW  
ROOM 7017  
WASHINGTON, DC 20260-7017  
TEL 202-268-8900  
FAX 202-268-3341  
WWW.USPS.COM

<b>RCE Category</b>	<b>Current Weight towards overall RCE score</b>	<b>New Weight towards overall RCE Score</b>
WTIL	25%	40%
HAZMAT	10%	15%
Product Offering	25%	0%
Product Explanation	20%	0%
Promotion & Merchandising	10%	25%
Image	10%	20%
<b>Total Weight</b>	<b>100%</b>	<b>100%</b>





## American Postal Workers Union, AFL-CIO

1300 L Street, NW, Washington, DC 20005

**Greg Bell**  
Executive Vice President

202-842-4250 (Office)  
202-842-4297 (Fax)

December 29, 2010

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John H. Dirzlus  
Coordinator, Northeast Region

Princella Vogel  
Coordinator, Southern Region

Omar M. Gonzalez  
Coordinator, Western Region

**To: Rob Strunk**

**From: Greg Bell** *B*

**Subject: USPS Will Be Making Changes to the Retail Customer Experience Program (RCE) Previously Known as Mystery Shopper Program (Notification No. GCCC20100768)**

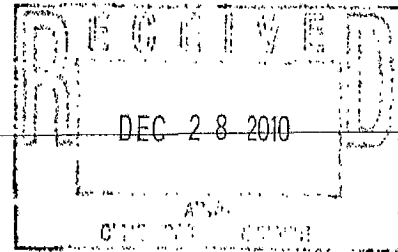
Please find attached a copy of a letter dated 12/27/2010 from John Dockins, regarding the above reference matter.

You are designated as the APWU contact person in this matter. Contact the USPS representative as soon as possible for discussion, if appropriate. Please provide notification of your review to me by 1/31/2011.

Please note: Your secretary should update the Notification Tracking Module in Step 4 CAS as necessary.

Attachment

GB/lbb  
opeiu #2/af-cio



December 27, 2010

Mr. Cliff Guffey  
 President  
 American Postal Workers  
 Union (APWU), AFL-CIO  
 1300 L Street, NW  
 Washington, DC 20005-4128

Certified Mail Tracking Number:  
 7099 3400 0009 0514 9040

Dear Cliff:

As a matter of general information, please be advised that the Postal Service will be making changes to the Retail Customer Experience Program (RCE), previously known as the Mystery Shopper Program, which will start in January 2011.

Currently, Retail Associates (RAs) use the Perfect Transaction method for all customers who are mailing packages, in which RAs ask scripted questions offering specific products, explaining their features and benefits. Results of these questions are reported in the RCE Product Offering and Product Explanation categories.

Based on a confidence in RAs product knowledge, the following changes will be made:

- RAs will no longer be required to use the Perfect Transaction method.
- RAs can customize their questions to best address individual customer needs.
- Product Offerings and Product Explanation categories will no longer be scored.
- RCE Shopper comments for these categories will be provided for informational purposes only.

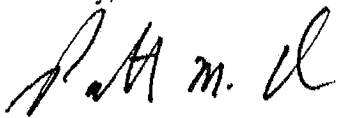
In addition, the HAZMAT question will still be required, but instead of asking the question for each individual package, the question will now be asked for the entire customer visit.

The scoring weights of RCE categories will be revised as follows:

RCE Category	Current Weight towards overall RCE score	New Weight towards overall RCE Score
WTIL	25%	40%
HAZMAT	10%	15%
Product Offering	25%	0%
Product Explanation	20%	0%
Promotion & Merchandising	10%	25%
Image	10%	20%
<b>Total Weight</b>	<b>100%</b>	<b>100%</b>

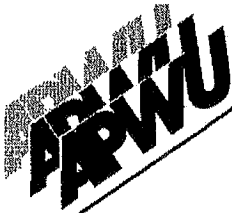
If you have any questions or concerns regarding this program, please contact Labor Relations Specialist Patrick Devine at (202) 268-5421.

Sincerely,

A handwritten signature in black ink, appearing to read "J. W. Dockins". The signature is fluid and cursive.

*for* John W. Dockins  
Manager  
Contract Administration (APWU)

(CA2010-848)



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1300 L Street, NW, Washington, DC 20005

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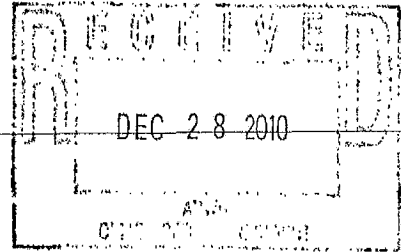
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GB/ibb  
opeiu #2/af-cio



December 27, 2010

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 Union (APWU), AFL-CIO  
 1300 L Street, NW  
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Certified Mail Tracking Number:  
 7099 3400 0009 0514 9040

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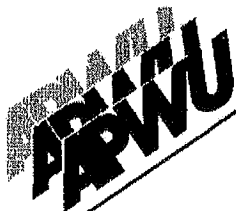
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Contract Administration (APWU)



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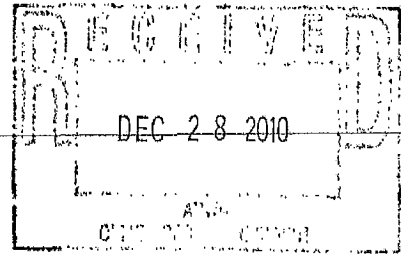
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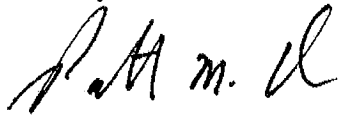
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