

# Management Instruction

## Lead Sales and Services Associate Training, Course 23501-05

This management instruction establishes policies and procedures for the administration of "Lead Sales and Services Associate Training," Course 23501-05. This course is one component of the Lead Sales and Services Associate (LSSA) training program, which was created to meet the training needs of newly assigned LSSAs, as well as Window Services Technicians (T-6) and Clerks, Finance Station in need of brush-up or refresher training. (See "Course Overview" for a list of all components of the training program.)

### Development

This training program was developed by Retail Workforce Strategies (RWS) and Employee Development (ED) in conjunction with the American Postal Workers Union (APWU).

### Objectives

This jointly developed training course is designed to provide newly assigned LSSAs with the knowledge and skills needed to perform their duties. It is also designed for T-6 clerks and Clerks, Finance Station in need of brush-up or refresher training. It includes instruction in elements such as interpersonal skills, customer relations, employee scheduling, Postal products and services, and security of funds. The training will be administered through a classroom and a structured on-the-job training (SOJT) format. A certified retail coach will conduct the SOJT. (The title "retail coach" replaces "on-the-job trainer." The retail coach duties are more clearly defined later in this document.) The retail coach administers the SOJT in accordance with the Lead Sales and Services Unit Profile, which lists LSSA duties. During the SOJT, the future LSSA is trained on those LSSA duties that he/she will be required to perform at his/her bid or assigned retail unit. The LSSA training program helps establish and reinforce desirable work habits and commitment in the critical early stages of a new duty assignment.

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## ACRONYMS

<b>APWU</b>	American Postal Workers Union
<b>ED</b>	Employee Development
<b>ELM</b>	<i>Employee and Labor Relations Manual</i>
<b>LSSA</b>	Lead Sales and Services Associate
<b>RWS</b>	Retail Workforce Strategies
<b>SOJT</b>	Structured On-the-Job Training
<b>T-6</b>	Window Services Technician

## Policy and Scope

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All Postal Service employees newly assigned to LSSA positions must complete the LSSA training program. Newly appointed craft employees are required to receive training in craft skills according to the provisions of the *Employee and Labor Relations Manual* (ELM) 715.3.

## Organizational Responsibilities

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### Retail Workforce Strategies

Retail Workforce Strategies is responsible for updates and additions to the “Lead Sales and Services Associate Training” course content.

### Employee Development

Employee Development is responsible for overall management of the “Lead Sales and Services Associate Training” course.

### Districts

The Manager, Training (or designee) is responsible for implementing the training program and must do the following:

1. Ensure that training is administered and conducted according to policies and procedures.
2. Ensure that a Lead Sales and Services Unit Profile is completed for each station and branch in the district with a Lead Sales and Services Associate, T-6 clerk, or Clerk, Finance Station position.
3. Forward the Lead Sales and Services Unit Profile to the retail coach prior to each SOJT session.
4. Coordinate the selection of the classroom instructors and retail coaches with the Manager, Retail.
5. Coordinate the selection of the SOJT sites with the Manager, Retail.
6. Ensure the availability of classroom instructors and retail coaches for the LSSA training program.
7. Ensure that work-related interruptions of future LSSAs, instructors, and coaches are avoided.
8. Support LSSAs (as well as T-6 clerks and Clerks, Finance Station needing brush-up or refresher training) by having current materials such as manuals, handbooks, and bulletins available for employees to use at the worksite.
9. Follow procedures detailed in ELM 434.222a, 434.622e, and 438.242 when administering and conducting the training program.

# Course Overview

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## Components and Time Allotted

The LSSA training program consists of three components: classroom instruction, SOJT, and a qualifying examination. The classroom instruction is expected to take up to 1 day, and the SOJT may take up to 2 days — the duration of the SOJT will vary depending on the number of processes identified on the Lead Sales and Services Unit Profile. It is recommended that the SOJT immediately follow the classroom instruction, but the SOJT must be completed within 7 calendar days of the end of the classroom instruction (exclusive of the future LSSA's scheduled leave). The qualifying examination CBT Test 411 is computer-based and self-paced. It is recommended that the qualifying examination be administered immediately following the completion of the SOJT. If at least 2 hours remain in the workday at the completion of the SOJT, the qualifying examination can be administered at that time. Otherwise, it is recommended that the qualifying examination be scheduled on the first workday following the completion of the SOJT.

## Instructional Methodologies

The classroom instruction and SOJT include instructional methodologies, such as presentations, demonstrations, role-plays, mock lobby simulations, and hands-on practices supported by audiovisuals and print materials.

## Classroom Instruction

The classroom instruction is designed to deliver the basic training that an LSSA needs prior to the required SOJT (or that a T-6 clerk or Clerk, Finance Station needs for brush-up or refresher training). The SOJT is based on the mandatory core processes identified on PS Form 2528-L, *Structured On-the-Job Training (SOJT) Certification*. It is also based on non-core processes identified on the Lead Sales and Services Unit Profile of the gaining retail unit. The order in which the SOJT processes are presented may be changed to accommodate local needs. The qualifying examination is computer-based and self-paced.

## Classroom Environment

The classroom environment should simulate the job environment. Equipment and materials used on the job should also be available during the classroom instruction. Mock use of retail equipment and peripherals are designed to reproduce behavioral processes that an LSSA needs to perform his/her duties.

## **Structured On-the-Job Training (SOJT)**

SOJT should take place in the LSSA trainee's newly assigned office. If that is not feasible, SOJT may be conducted in the retail coach's unit. All processes from the trainee's newly assigned unit must be taught, and appropriate equipment must be used.

## **Qualifying Examination**

The qualifying examination CBT Test 411 is computer-based and self-paced. It should be administered immediately following the completion of the SOJT. (See "Components and Time Allotted" in this section for more information.) It must be administered by a certified test examiner. The qualifying examination must not be administered to those taking this training program as brush-up or refresher training.

## **Training Materials**

A Lead Sales and Services Associate Training Facilitator's Guide, Participant's Guide, SOJT Job Lesson Plans, and related handbooks and manuals must be used to conduct this training.

## **Recording Future LSSA's Time**

Record the future LSSA's time as follows:

1. Record and charge all time used for the classroom instruction and SOJT as training hours to the *gaining retail unit*. (See Handbook F-21, *Time and Attendance*, 424.71.)
2. Record and charge the time used for the qualifying examination to *training*.

## **Classroom Instructors**

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### **Importance**

The success of the LSSA training program depends on the professional integrity and high caliber of the instructors chosen to conduct the classroom sessions. An adequate number of certified instructors must be maintained so instructors are available to support the training requirements.

### **Selection**

#### **Announcement and Application**

As classroom instructors are needed, the Manager, Training and the Manager, Retail should post ad-hoc duty assignments and fill the assignments in accordance with the instructions herein. Retail

associates with 1 year of continuous retail experience occupying a retail duty assignment at the time of consideration are eligible to apply. Applicants must be able to demonstrate proficiency in the areas of interpersonal skills, customer relations, employee scheduling, Postal products and services, security of funds, and close out and audit procedures.

## **Review and Selection**

The Manager, Training and the Manager, Retail (or their designees) will select classroom instructors based on a combination of an employee's years of window service experience and the successful completion of the "Facilitative Instructor Workshop," Course 21258-00. They should select enough instructors to allow training responsibilities to be rotated. It is recommended that selected classroom instructors also complete "Job Instructor Training," Course 23501-01.

## **Preparation**

It is essential that a classroom instructor be provided proper training materials and adequate on-the-clock preparation time to successfully fulfill his/her responsibilities.

## **Duties**

Classroom instructors must do the following:

1. Review the "Lead Sales and Services Associate Training" materials. To conduct successful training sessions, instructors must be familiar with the training materials, retail equipment, and instructional methods used.
2. Ensure that all materials are current and available. When handouts and reference materials are needed, the instructor is responsible for having them ready to use and/or distribute.
3. Review the instructions in each module to ensure that needed classroom equipment and support materials are in place before class begins.
4. Provide the necessary learning experiences that actively engage the future LSSAs through adult learning techniques such as role-playing, hands-on simulations, etc.
5. Help update and maintain "Lead Sales and Services Associate Training" materials by using the current directives.

## **Compensation**

### **Rate**

Classroom instructors are paid at the PS – 6 rate of pay.

## **Mileage and Other Expenses**

Appropriate reimbursement for lodging, per diem, and travel is authorized in accordance with Handbook F-15, *Travel and Relocation*, and ELM 716. To claim reimbursement for any travel expenses incurred, classroom instructors must use the eTravel system or PS Form 1164, *Claim for Reimbursement for Expenditures on Official Business*, as appropriate. If an overnight stay is required, classroom instructors must use PS Form 1011, *Travel Advance Request and Itinerary Schedule*, to get an advance, or PS Form 1012, *Travel Voucher*, to claim reimbursement for expenses incurred.

## **Instructor Training Time**

When a classroom instructor is assigned a full workday in other than the “Lead Sales and Services Associate Training” academy, his/her time must be recorded to the proper operation and pay location.

## **Retail Coaches**

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### **Importance**

Retail coaches reinforce classroom training concepts by training new LSSAs (as well as T-6 clerks or Clerks, Finance Station in need of brush-up or refresher training) in a retail unit. This training also provides retail coaches with experiences that will enable them to serve as classroom instructors when vacancies or absences occur. To serve as classroom instructors, retail coaches must successfully complete the “Facilitative Instructor Workshop,” Course 21258-00.

### **Selection**

The Manager, Training (or designee), along with other appropriate managers, will select a cadre of retail coaches. Retail associates with 1 year of continuous retail experience occupying a retail duty assignment at the time of consideration are eligible to apply. Applicants must be able to demonstrate proficiency in the areas of interpersonal skills, customer relations, employee scheduling, Postal products and services, security of funds, and close out and audit procedures. Any volunteer must successfully complete “Job Instructor Training,” Course 23501-01, before being considered qualified to conduct SOJT.

### **Preparation**

It is essential that a retail coach be provided adequate on-the-clock preparation time to successfully fulfill his/her responsibilities. A retail coach must have general knowledge of the Facilitator’s Guide, as well as the SOJT training documentation from the “Lead Sales and Services Associate Training” course. The SOJT training documentation includes

the Lead Sales and Services Unit Profile and Job Lesson Plans, the SOJT certification worksheet (PS Form 2528-L), and PS Form 2548, *Individual Training Record*.

## **Duties**

A retail coach must do the following:

1. Review the Lead Sales and Services Unit Profile of the future LSSA's assigned retail unit to determine which Job Lesson Plans will be used during the SOJT.
2. Review the instructions in each Job Lesson Plan to ensure that the appropriate training materials, retail equipment, and instructional methods are used.
3. Ensure that all materials are current and available. When handouts and reference materials are needed, the retail coach is responsible for having them ready to use and/or distribute.
4. Provide the necessary learning experiences that actively engage the future LSSA through adult learning techniques such as role-playing, hands on simulations, etc.
5. Help update and maintain "Lead Sales and Services Associate Training" materials by using the current directives. Retail coaches must use the Job Lesson Plans to guide them in conducting the SOJT.

## **Compensation**

### **Rate**

Retail coaches are paid at the PS – 6 rate of pay.

### **Mileage and Other Expenses**

Appropriate reimbursement for lodging, per diem, and travel is authorized in accordance with Handbook F-15, *Travel and Relocation*, and ELM 716. To claim reimbursement for any travel expenses incurred, retail coaches must use the eTravel system or PS Form 1164, *Claim for Reimbursement for Expenditures on Official Business*, as appropriate. If an overnight stay is required, retail coaches must use PS Form 1011, *Travel Advance Request and Itinerary Schedule*, to get an advance, or PS Form 1012, *Travel Voucher*, to claim reimbursement for expenses incurred.

### **Retail Coach Training Time**

When a retail coach is assigned a full workday of LSSA coaching duties, his/her time must be recorded to the proper training operation and pay location and rate of pay. These hours should be transferred to the future LSSA's *gaining retail unit*.

## Quality Control

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The Manager, Training (or designee), Retail Workforce Strategies, and Employee Development are to monitor the quality control and follow-up of these essentials for “Lead Sales and Services Associate Training.”