

# *Retail Associate One-on-One Discussion*

**Greeting:** Good morning \_\_\_\_\_, how are you today?

**Explain Purpose of Meeting:** I'm meeting with each member of the Team to review our performance and sales skills to determine how we can make the most of the remainder of this fiscal year.

**Clarify Expectations:** As you know, offering Express Mail, Priority Mail and Special Services to our customers is critical to the USPS for increasing customer satisfaction, increasing revenue, and increasing earned work hours. Our goal is to sell Express and Priority services for 87% of all transactions, and to apply Special Services to at least 39% of those transactions.

**(Making goal)** You are doing an outstanding job of meeting these goals! What are some things you do or say to meet these targets so that I can share them with the others.

**(Not making goal)** What is preventing you from making these goals?

1. What is preventing you from making the goals?
2. How can I help you reach our goals?

One of the ways we measure if we are improving customer satisfaction and growing revenue is through the Retail Customer Experience shops. This tool enables us to assess and improve operations, which ultimately improves customer satisfaction and increases revenue. Each shop evaluation provides a customer "snapshot" of the service received at our office. I have a copy of the sales skills process we need to follow to maximize the opportunities each customer visit presents us. Please take a minute to review the steps and let me know if you have questions on any of the steps outlined here.

**Invite Feedback:** Our most recent RCE shop score was \_\_\_\_\_%. We lost points for \_\_\_\_\_

3. We have a pattern of missing these questions:  
\_\_\_\_\_

What could we have done to improve this shop and what can you personally do at the window to improve customer satisfaction and increase revenue? \_\_\_\_\_

4. What Can I do to assist in making this easier for you?  
\_\_\_\_\_

5. We have been working on communicating consistently and regularly with all the employees in our office. Are you satisfied with the amount of communication you receive from management? YES or NO.

HR-MIN	Begin	End	Begin	End
Hundreths	BT	OL	IL	ET
Omo, Natalie, R	9:94	14:80	15:31	18:50
Omo, Natalie, R	10:24	14:06	15:20	18:01
Rasmussen, Dav	5:23	11:08	12:07	16:25
Rasmussen, Dav	7:37	10:23	13:59	16:08
Colbert, Sharon,	8:29	12:25	13:25	17:37
Colbert, Sharon,	8:23	12:11	13:16	17:00
Montis, Michael,	9:50	13:58	14:58	18:50
Montis, Michael,	9:39	13:32	14:40	18:06
Shoppel	16:37	17:06		

**Instructions:**

Enter the RCE Times in the Burgundy Cells (Hours:Minutes)  
 Enter the TAOS Times in the Blue Cells (Hours:Hundreths) \*minimum 1 unit lunch mi  
 Shoppe begin and end times in the Green cells (Hours:Minutes)  
 \*From the time on the receipt, be sure to count back the wait time period to get the start time

HR-MIN	Begin	End	Begin	End
Hundreths	BT	OL	IL	ET
Omo, Natalie, R TA				
Omo, Natalie, R				
Rasmussen, David				
Rasmussen, David, B				
Colbert, Sharon, K				
Colbert, Sharon, K				
Montis, Michael, S				
Montis, Michael, S				

Comments

8.00  
8.25  
8.50  
8.75  
9.00  
9.25  
9.50  
9.75  
10.00  
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18.25  
18.50  
18.75  
19.00  
19.25  
19.50  
19.75  
20.00

## Retail Customer Experience Best Practices/Recommendations

### COMMUNICATION – RECOGNITION – ACCOUNTABILITY

#### COMMUNICATION

- Have Retail Associate (RA) on standby ready to open another window when needed
- Use buzzer or wireless chimes so RA can alert management for assistance.
- Post signs for local contract Postal Units.
- Implement huddles at each station – devote at least 5 minutes a week scheduled on same day/time to insure consistency. Communicate targets/expectations/achievements.
- Communicate on-on-one with RAs to discuss individual performance.
- Retail operations MUST receive equal attention and importance as delivery. “We must “sell” before we can process or deliver.
- Instill PRIDE in every employee.

#### RECOGNITION

- Recognize employees for exceptional performance at least weekly.

#### ACCOUNTABILITY

- Retail training was provided in June & July 2010 to every RA in EAS-18 and above Post Offices. Hold them accountable to use the skills.
- Implement internal secret shops or cross shops with a neighboring office. This will enable the shopper to immediately give feedback.
- Take appropriate action to insure sales skills questions are asked. If the questions are asked, there is never a doubt we missed any special services revenue opportunity.
- Be proactive with Retail – not reactive.
- Insure the Managers/Supervisors in the unit are knowledgeable of Retail operations. Be sure they can talk the talk with RAs with confidence and understanding.
- Utilize the information/tools/data available on the Retail Website.
- Are 4000A's and B's being completed? If they are – is the appropriate action/follow-up being taken to correct deficiency?
- Utilize the data and reports available to measure performance – have a discussion with the RA.
- Conduct observations and lobby sweeps – see and hear what the customer does.

## SSRD Findings for Des Moines MOS RCE Service Evaluation 11-12-2010

The retail transaction for the RCE service evaluation occurred at 17:04:04. The Mystery Shopper waited in line for 10 minutes and 34 seconds, so the WTIL started at 16:53:30. Three clerks were clocked in on TAC during the evaluation (Natalie Omo, Sharon Colbert, and Michael Montis).

Here is a break down of the retail transactions during the RCE Service Evaluation:

Natalie Omo: Did not have any retail transactions from 15:24:23 to 17:03:11. She returned to the window shortly before the Mystery a shopper was waited on (17:04:04).

Sharon Colbert: Had a lag time of 6 minutes and 25 seconds at 16:50:37, starting three minutes before the Mystery Shopper got into line, and returned at 16:57:02. When Sharon returned she waited on a customer shipping a package parcel post. The evaluated time for this transaction was 1 minute 19 seconds. The actual visit time took 3 minutes and 48 seconds. The transaction difference was over by 2 minutes and 29 seconds while the Mystery Shopper waited in line. This was Sharon's last transaction for the day. She had no more retail transactions after 17:00:50. She closed the window.

Michael Montis: He was evaluated by the Mystery Shopper at 17:04:04. He failed the service evaluation with a score of 37%. Michael had a non-revenue transaction at 16:47:13 about 6 minutes before the Mystery Shopper got in line. This non-revenue transaction lasted for 11 minutes and 29 seconds. The Mystery Shopper got in line while Michael was away from the window. Michael's next transaction was at 16:58:42 and the Mystery Shopper had been waiting in line for about 5 minutes. According to the comments and the time away from the window, it appears Michael left the window to go find some help. After he returned to the window he had three transactions before the RCE Service Evaluation. He had lag times of 0:57, 0:47, and 0:43 seconds between each customer. We know the Mystery Shopper was waiting in line and there was about a minute lag time between each customer. This supports the comment from the Mystery Shopper stating that there seems to be a lack of urgency for the number of customers in line. Why the lag time when we know there are customers waiting in line.

Here are the comments from the RCE Service Evaluation:

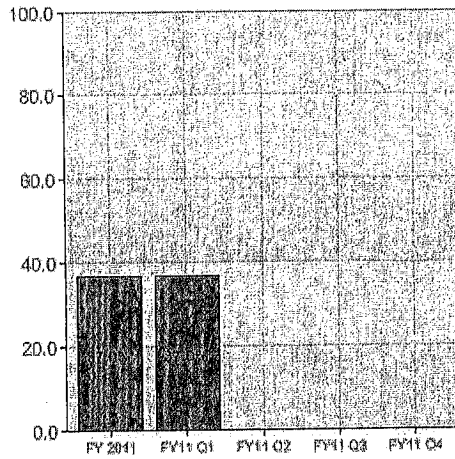
**WTIL** - There were only two workstations open and one of them closed while I was in line. One customer took over seven minutes. The clerk had to go into the back to get someone else to work at the counter. There seemed to be a lack of urgency shown for the number of customers in line.

**IMAGE** – Employee did not greet me pleasantly; Employee did not make eye contact at the beginning of the transaction; Employee did not end transaction in a pleasant manner;

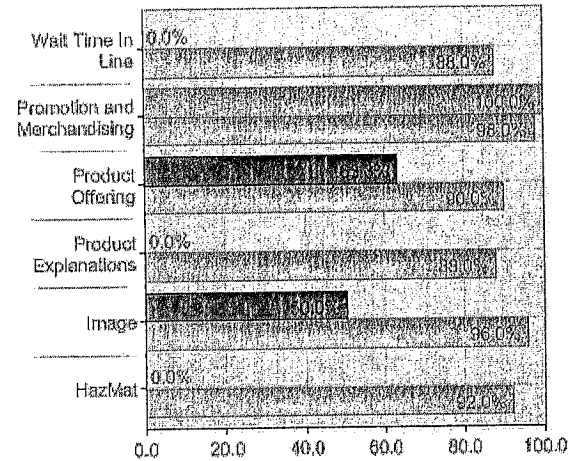
**OVERALL EXPERIENCE** – The clerks did not seem concerned about the people waiting in line. I was not greeted or thanked.

# Location Action Report for 050318 Des Moines IA - Main Office Sta - FY11 Q1 Shop

**Overall Score Trend**



**Category Scores**



050318 Des Moines IA - Main Office Sta	37.0	37.0			
National Goal 90.7%	X	X			

National Goal	Lower Than Goal	Higher Than Goal
■	■	■

<b>Current Score</b> <b>37.0%</b>	<b>YTD Score</b> <b>37.0%</b>	<b>Improvement</b> <b>0.0%</b>	<b>WTIL</b> <b>10:34</b>
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<b>Revenue Results:</b> (70% compliance)	<b>Revenue Results Detail:</b> <ul style="list-style-type: none"> <li><input checked="" type="checkbox"/> ReadyPost Available</li> <li><input checked="" type="checkbox"/> Offering Priority after Express offered</li> <li><input checked="" type="checkbox"/> Offering Express First</li> <li><input checked="" type="checkbox"/> Offering Express and Priority</li> <li><input checked="" type="checkbox"/> Extra services offered</li> <li><input checked="" type="checkbox"/> Offering Additional Products</li> <li><input checked="" type="checkbox"/> ReadyPost Items All Stocked</li> <li><input type="checkbox"/> Mention Insurance / Tracking with Express</li> <li><input type="checkbox"/> Extra services explained</li> <li><input type="checkbox"/> Explain Priority Mail Benefits / Features</li> </ul>
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<b>Strengths by Category</b> Promotion and Merchandising	<b>Opportunities by Category</b> Wait Time In Line Product Offering Product Explanations Image HazMat
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# USPS Retail Customer Experience Service Evaluation

50318 Des Moines IA - Main Office Sta  
 Visit ID: 2539754-2220810

Date: Friday, 11/12/2010  
 Overall Score: (37/100) 37.0%

## Evaluation Information

Please enter your shop date	Friday, 11/12/2010
Day of the week shop performed (e.g., Tuesday):	Friday
Time entered the post office	16:52
Time exited the post office	17:06
Time Band in which Shop was Completed	Afternoon
Was your type of shop a Dimensional Weight shop?	No
Was your type of shop a ReadyPost shop?	No
Were one of the 4 ReadyPost packages listed in your Reference Guide Available?	-
Were you charged for your ReadyPost package?	-
Post Office Zip Code on Receipt:	50318
Mail Class Amount:	11.90
ReadyPost package Amount:	0.00
Delivery Confirmation Amount (if purchased):	0.70
Insurance Revenue Amount (if purchased):	0.00
Total Amount on Receipt:	12.60
Delivery Confirmation Revenue Loss	0.00
Insurance Revenue Loss	1.75
Total Revenue Loss	1.75
Evaluation Scenario	FY11 Q1 Shop

## Wait Time In Line

Q01	How long was your wait in line?		10:34
Q02	Select the category that includes your wait time.	0/25	>6:00
Q02a	If your wait time was longer than 5 minutes, please provide comments on why your wait time was so long.		There were only two workstations open and one of them closed while I was in line. One customer took over seven minutes. The clerk had to go into the back to get someone else to work at the counter. There seemed to be a lack of urgency shown for the number of customers in line.
Q03a	How many workstations were there (including all areas where a register is available)?		5
Q03b	What was the highest number of workstations staffed from the time you entered the line until completion of the transaction?		2
Q03c	When you entered the line, how many customers were in line ahead of you?		4
Q04	When you entered the line, how many customers appeared to be conducting transactions at the counter?		2
Q05	Were there any employees assisting customers in the lobby area or from behind the counter prior to customers reaching the counter?		No
Q05a	On a scale of 1 to 10 with 1 being 'Not Reasonable' and 10 being 'Very Reasonable', 'How reasonable was the amount of time you waited in line, given the effort put forth from the staff?'		3

Wait Time In Line (0/25) 0.0%

## HazMat

Q06	Did the employee ask whether the parcel (item, article) contained anything fragile, liquid, perishable, or potentially hazardous?	0/8	No
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Q06a	If No, which part(s) of the question did they miss?		Liquid; Fragile; Perishable; Hazardous;
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**HazMat (0/8) 0.0%**

**Product Offering**

Q07	Did the employee offer a specific product for you to mail your package?		Yes
Q07a	Specify which product(s) were offered by the employee to mail your package. [Not necessarily in the order offered.]	6 / 6	Express; Priority; Parcel Post;
Q07b	Which product did you purchase?		Priority
Q08	Was Express offered 'First'? (Before any other mail class)	4 / 4	Yes
Q09	Which product did the employee offer 'first', excluding Express? [Points only given for Priority Mail.]	3 / 3	Priority
Q10	Did the employee offer any Extra Services?		Yes
Q10a	Specify the Extra Service(s) offered by the employee. [Maximum of 10 points provided for combinations of any of the following Extra Services]	4 / 10	Delivery Confirmation;
Q10b	Which Extra Service(s) did you purchase?		Delivery Confirmation;
Q11	Specify additional product(s) offered: [Points given for Stamps, Packaging/Shipping products, P.O. Box Rental, Passports and Money Orders]	0 / 5	None of the above;
Q12	Did the employee provide or offer a receipt without you having to ask for one?	2 / 2	Yes

**Product Offering (19/30) 63.3%**

**Product Explanations**

Q13	When Express mail was offered did the employee mention that 'Insurance' and 'Tracking' was included?		0 / 5	No
Q14	Did the employee explain any benefits or features of Priority Mail?		0 / 4	No
Q14a	Specify the benefits or features of Priority Mail that were explained:			
Q14b	If Other, please explain:			
Q15	Did the employee explain any features of the Extra Service(s)?			No
Q15a	Specify the Extra Service(s) for which features were explained: [Points provided for explaining any of the Extra Services offered in Q10a.]		0 / 6	

**Product Explanations (0/15) 0.0%**

**Promotion and Merchandising**

Q16	Were you able to locate the form for the Extra Service you were instructed to find in the lobby PRIOR to being served?	2 / 2	Yes
Q16a	Which forms were you able to locate in the lobby.		Delivery Confirmation; Insurance \$200 and Under; Insurance over \$200; Signature Confirmation; Certified; Return Receipt;
Q17	Were ReadyPost retail packaging/shipping supplies displayed in the full service lobby?		Yes
Q17a	If question 17 is 'No', were ReadyPost Packaging/shipping supplies behind the service counter?		
Q17b	If question 17 is 'Yes', did the display appear neat and orderly?	2 / 2	Yes
Q17c	Were all ReadyPost items stocked?	3 / 3	Yes
Q18	Were Complimentary shipping supplies displayed (Express Mail, Priority Mail)?		Yes
Q18a	If question 18 is 'Yes', did the display appear neat and orderly?	2 / 2	Yes
Q18b	If question 18 is 'Yes', were all items stocked?	3 / 3	Yes
Q19	Were ALL Continuity menuboards that were present in the office Current and ONLY displayed side-by-side, directly above or behind the retail counter?	1 / 1	Yes
Q19a	If No, please specify why:		
Q20	Were ALL Promotional Messaging menuboards that were present in the office Current and ONLY displayed side-by-side, directly above or behind the retail counter?	1 / 1	Yes
Q20a	If No, please specify why:		

**Promotion and Merchandising (14/14) 100.0%**

**Image**

Q21	Did the employee greet you pleasantly, make eye contact at the beginning of the transaction, and end the transaction in a pleasant manner?	0 / 2	No
Q21a	If No, which part(s) of the question did they miss?		Employee did not greet me pleasantly; Employee did not make eye contact at the beginning of the transaction; Employee did not end transaction in a pleasant manner;

Q2	Was the employee attentive during the entire transaction?	0 / 2	No
Q22a	If No, which problems were observed?		Other distraction or interruption;
Q23	On a scale of 1 to 10 with 1 being 'Not at all valued' and 10 being 'Very Valued', 'How valued as a customer did the employee make you feel?		5
Q24	If you were a customer with little or no previous understanding of the USPS products and services, on a scale of 1 being 'Left with little or no additional understanding', and 10 being 'Left with good understanding', 'How would you rate your level of understanding, based on this specific experience?'		3
Q25	Was the employee wearing the complete uniform?	1 / 1	Yes
Q25a	If No, what was the Clerk NOT wearing?		
Q26	Were all signs and displays professional in appearance, including posting and lettering?	2 / 2	Yes
Q26a	If No, which problems were observed?		
Q26b	Please specify what signage or display(s) had problems:		
Q27	Was the interior neat, clean and well maintained?	1 / 1	Yes
Q27a	If No, please explain why		
Q27b	Were all displays present, neatly maintained and stocked?		Yes
Q28	Was the exterior neat, clean and well maintained?		Yes
Q28a	If No, please explain why		

Image (4/8) 50.0%

### Overall Experience

Q29	On a scale of 1 to 10 with 1 being 'Not at all Positive' and 10 being 'Extremely Positive', 'How would you rate your Overall Experience as a customer at this location?'	4
Q30	On a scale of 1 to 10 with 1 being 'Did not Meet' and 10 being 'Exceeded,' 'Please rate how this particular experience measured up to your expectations.'	4
Q31	On a scale of 1 to 10 with 1 being 'Not at all Likely' and 10 being 'Extremely Likely', based just on this particular experience, 'How likely would you be to return to this location for personal business?'	4
Q31a	Please provide a comment explaining your 'Likelihood to Return' rating of question 31.	The clerks did not seem concerned about the people waiting in line. I was not greeted or thanked.