



Sales Skills Management Process

Participant's Guide

**Course 41201-00
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Employee Resource Management
Employee Development



Sales Skills Management Process

Participant's Guide

United States Postal Service
Employee Resource Management
Employee Development
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Washington, DC 202604215

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Contents

Module 1: The Retail Transaction

Module 2: Product Knowledge = Power***

Module 3: Coaching for Performance

Module 4: Observation/Recognition

Module I: The Retail Transaction

Objective: Participants will be able to describe and name the Quality processes involved with the Sales Skills effort and how the Action Plan tool is applied to implementation.

- Participants will be able to describe the Supervisory process for the Sales Skills effort inclusive of the point of receipt of original training, through their delivery of training and to ongoing program monitoring.
- Participants will understand both the PROCESS and the RATIONALE for standardization of the Retail transaction inclusive of GIST and the 'key' questions.
- Participants will be able to identify the USPS **CustomerPerfect!** Process Management System version of the standard retail transaction.
- Participants will be able to complete the Action Planning tool.

Time Allocated for Module:

- 2 hours

Instructional Methods:

- This module leverages the use of two **CustomerPerfect!** Formatted Process Management Systems. These methods include lecture, questions/answers, and transparency displays of graphics.

Summary:

- A lot of material is covered in a few pages in this module. There is the element of Process that is introduced and emphasized. Two distinct processes are covered; one which depicts the entire Sales Skills effort from District Coordinator training to ongoing program monitoring, and the other which is the actual standardized retail transaction process for how customers need to be served. The transaction process utilizes the GIST principles and key questions that we to ask our customers. The Action Plan Quality tool is introduced followed by an in-depth review of prescriptive items deemed necessary for completion of program deliverables.

Participant Material Used:

- **Participant's** guide

For Further Information

- Contact John Keith **Schwarz**, Quality Specialist, Quality Sales 8 Marketing Support, 202 268 7721

Administration

As with most programs, administrative information helps to guide users on implementation.

The Supervisor Retail Sales Skills “Matrix” and “Action Plan 1” are two such examples provided here for the Sales Skills effort.

Supervisor Retail Sales Skills Matrix

The Supervisor Retail Sales Skills Matrix outlines the series of events for this retail training effort. Essentially it describes the way in which information is ‘cascaded’ down through the organization to end-users and monitored flow progress to completion.

The third box mentions the Action Plan 1, which is described in more detail a little later in this document.

The **fifth** box from the top denotes a paradigm change from training to **orientation. This distinction is made because the original session held for District Coordinators, followed by those sessions they subsequently hold for their respective local Mgrs., Supvs., PM’s, etc. are the only formal ‘training’ settings for delivery of the entire Sales Skills course material. The information transference that occurs between the front-line Manager to Retail Clerks occurs as per orientation sessions, Retail talks, etc.**

The Sales Skills course prepares managers for the ability to deliver on those items mentioned in boxes six and eight. This includes standardized retail transaction process, recognition, coaching and product knowledge.

The final box describes the intent for ongoing monitoring of the results of Sales Skills training, coaching, recognizing, etc. via existing measures **such as RUP Index, CSI and Mystery Shopper.**

Retail Sales Skills Process Management System

A cross-functional team determined that a Sales Skills training **rollout** was necessary to utilize certain Quality tools including Process Management. Although time doesn't permit us to do an in-depth explanation of that discipline in this setting, certain Process Management Systems will be **introduced**.

The first is the Supervisor Retail Sales Skills Process, which expands upon the previously introduced Sales Skills Matrix. It defines the entire management of the Sales Skills effort from the point of the delivery of District Coordinator training through the ongoing monitoring of performance.

The upper left-hand box of the Supervisor Retail Sales Skills Process Management System describes the process. The lower right-hand corner **identifies the latest version of the process**.

The top line identifies the customer of the process, the valid requirements the customer should derive from the process and how it is delivered, quantitatively.

The main body of the Process Flowchart portion, which depicts all **necessary activity steps in sequence, and aligns them vertically as to** whom, is responsible. As an example, the District is responsible for three activities handled principally, by the District Coordinator.

It is believed the activities depicted here are self-explanatory. The Instructor leads participants through the process.

The flowchart has **two process indicators (P-measuring** execution of a portion of the process), and one result indicator (R-a measure of some output characteristic of the whole process). PI is a quantitative measure of those completing Sales Skills orientation, where P2 and RI integrate indicators currently systemic.

The miscellaneous column on the far right offers additional clarification to **content within the process chart**.

Finally, the far left-hand column splits the entire process in this case, into two steps. Each step has a time frame attached to it articulating expectations for that group of activities. You will note that as an example, it is expected that all targeted Retail Clerks will receive their respective standard Retail Transaction Process orientation by 1 **1/20/2000**.

Action Planning

This part of Administration contains a blank Action Plan template and a completed Action Plan 1 referred to previously in the Supv. Retail Sales Skills 'Matrix'.

The Action Plan is a very simple tool for documentation and monitoring a set of deliverables to completion.

The first focus is on the 'what' column and where to list out all of the items to be accomplished. Utilize local participants to gain input for buy-in of Action Plan items.

It is important to note the balance of the Action Plan items (how, who, time, and measure) should be completed for each individual 'what'.

'How' would refer to the method in which a particular 'what' item will be accomplished.

'Who' could refer to either the person(s) actually responsible for a particular 'what', or the person(s) responsible for getting it done through others.

'Time' could refer to either an actual elapsed time it takes to complete a particular 'what', or a calendar time frame for completion.

'Measure' is that element that allows us to know that the particular 'what' has in fact been completed.

Action Plan 1

Action Plan 1 describes those things that are necessary for the District Coordinator to do to execute their respective training for the original program roll-out (inclusive of training delivery and program monitoring).

Seven key 'whats' are performed in order, if possible.

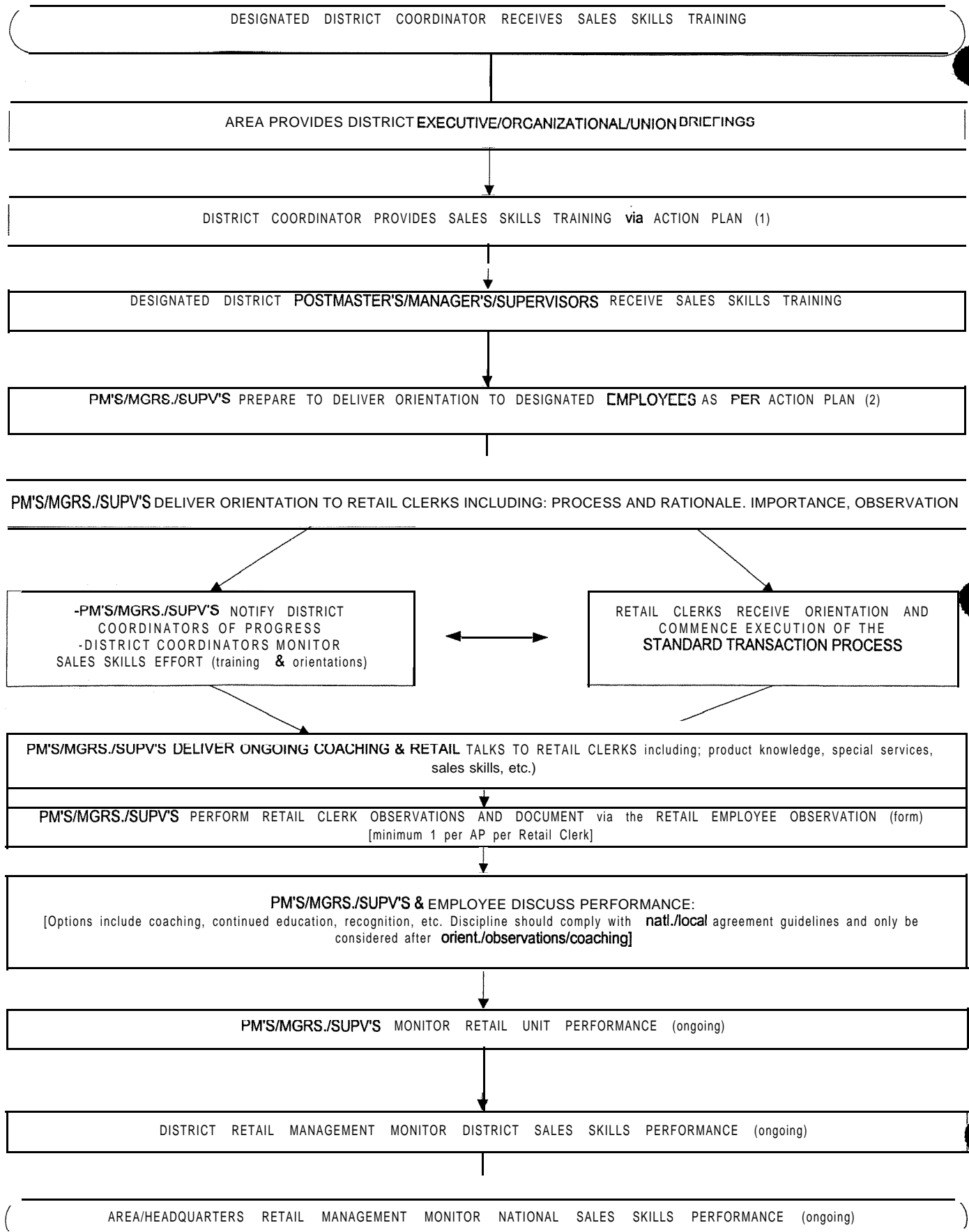
In order to meet the over-all target date of training/orientation by 1 1/20/00, complete items 1-5 within thirty days of completion of original District Coordinator training.

Item 4 materials would be an inventory of that already provided (such as tool-kit, texts, etc.), as well as whatever is deemed necessary to assemble locally too effectively rollout the program.

Item 8 allows for local discretion. Anything that would enhance local rollout should be considered.

SUPERVISOR RETAIL SALES SKILLS 'MATRIX

8/08/2000



USPS PROCESS MANAGEMENT SYSTEM

PROCESS OWNER: Nancy Latch 202 2685548
Lois Murphy 638 733-5132

QUALITY CONTACT: John K. Schwarz
PHONE NUMBER: 202 268-7721
FILE NAME: srss.vsd

Process Description: **Supv. Retail Sales Skills (2nd Level Macro)** Process Customer: **Retail Personnel, USPS Retail Operations** Customer Valid Requirements: **Timely, Efficient Sales Skills Deployment** Outcome Results Indicator(s): **100% Timely and Efficient**

Position Step/ Time	Process Flowchart			Process and/or Results Indicators		Checking			Misc. Information	
	District	Designated: Postmaster, Mgr. I Supv.	Retail Clerks	Process Control Charts	Control Limits	Checking Item	Frequency	Responsibility	Contingency Plan	Include: Abbreviations, Procedures, Remarks, etc.
DELIVER	Designated District Coord. receives Sales Skills Trng./Area provides District executive/organizational/union briefings Distr. Coord./Trainer provides 'Sales Skills' trng. via Action Plan 1	Designated USPS, PM, I, Mgr. I Supv. Receives 'Sales Skills' Trng. Prepare to deliver orient. to designated employees as per Action Plan (2) Deliver Orient. Inclusive of: -Message -Importance -Process -Evaluation Notify Distr. Coord. of Progress	Receives Orient. / Understands / Document	P1= % Orient. Completed	100%	Documents	Weekly	Distr. Coord.	Reminder	# = Options Include Coaching, Continued Education, Recognition, Etc. # = Discipline Should Comply with Natl. I Local Agreement Guidelines and only be considered after Orient. Observations I Coaching + = Minimum 1 Per AP Per Retail Clerk RUPI = Retail Unit Proficiency Index
	11/20/2000 Dist. Coord. Monitors Sales Skills Effort P1	Execute Ongoing Standard Transaction Proc. (Retail Sales Skills Micro) Perform Retail Personnel + 'Observations' and Document Management I Employee Discuss Performance # PM / Mgr. / Supv. Monitors Retail Unit Performance (Ongoing) P2		P2= Monitor Scores of Retail Unit	TBD	CSM, Mys. Shop., Cust. Ex. Interv. Etc!	AP	Unit Mgr / Supv. / P M	Improv. Effort	
MONITORING				P1= Sales Skill Dimension (RUPI) Total Score	Upward Trend TBD	RUPI, Mys. Shop., Cust. Exit Interview	Quarterly	Mgr. Retail Nkfr. Strat.	Improv. Effort	
	ONGOING	Dist. Retail Mgmt. monitors Dist. Sales Skills Perf. (ongoing) R1								

Rev #	Date	Revision Description	By	Appr.
1	5/10/00	First Draft	RS	Team
3	6/29/00	Revise P1	JKS	Team
4	7/13/00	change orient. in misc. column	J K B	Team
5	8/09/00	change Action Plan # box	JKS	Team

District Coordinator Action Plan (1)

<u>What</u> needs to be done	<u>How</u> to do the "what"	<u>Who</u> is doing the "what"	<u>Time</u> how much time for the "what"	<u>Measure</u> what is going to confirm the "what" got done
1. ID personnel to be trained	Prioritize units (mystery shop units first)	Dist Coord/designee	Within 30 days of National Training	Trainee List
2. Secure proper training location	*	Dist Coord/designee	Within 30 days of National Training	Location/space reserved
3. Schedule training	*	Dist Coord/designee	Within 30 days of National Training	Training scheduled
4. Secure all necessary materials (equip, texts, handouts, overhead, etc)	*	Dist Coord/designee	Within 30 days of National Training	All necessary materials secured
5. Prepare for training development	Review information, develop final presentation plan, etc.	District Coordinator	Within 30 days of National Training	Fully prepared to train
6. Conduct training	As per Sales Skills Facilitator's Guide	District Coordinator	NTE 11/20/00	ID personnel trained
7. Document training	Obtain local training documentation form & complete	District Coordinator	NTE 11/20/00	Training documentation available (National training database, NCED)
B. Other activities at local discretion	*	*	*	*
* Local Decision				

Retail Sales Skills Process

Through the years many evolutions have occurred in our Retail arena. We have instituted GIST, we have had numerous revenue generation campaigns of varying nature, we have recently instituted the 'key questions', the Mystery Shopper program, etc. What better way to incorporate all of these elements into the retail transaction than through the use of Process?

What better way to insure the ability to offer consistent, efficient, professional transaction at every location, everyday, by every retail Clerk through the use of a standard transaction process.

The Retail Sales Skills Process is the standard. This program will go a long way in assisting the Retail Clerk so they understand WHY it is important to greet properly, ask the key questions, etc. Therefore, the Process should be presented insuring comprehension of the steps and why we are standardizing the transaction.

For the very first time the USPS has a documented, standard process for the transacting of business in the Retail environment! What this means for the approximately seven million customers a day is the assurance that wherever they are, whenever they do business with us they will receive the same high level of experience in every aspect of the transaction from courtesy, to product/service offerings, to professionalism. For the business, we gain assurance of meeting customer need(s) while also generating maximum possible revenue. For our employees, they will gain a high level of confidence of meeting the customers needs with professional, courteous, and highly knowledgeable interaction at the retail counter.

This is really not about Mystery Shopper Program. It's about following a standard transaction that takes into account all the elements that have been desired to occur in the transaction between the USPS and the Customers. Therefore, transact properly with the customer each and every time and everybody wins the CUSTOMER, the USPS, and YOU.

In this part of module 1 the Retail Sales Skills Process is offered in **non-Process Management System** format. **Districts** can opt to **utilize** this format when/where Process Management may not be as recognizable (the Process Management version will be offered in the next part of module 1).

Talking Points on the Retail Sales Skills Process (review with process flowchart)

Step 1- Customer is at the retail outlet for service.

This is the typical and logical starting point for the retail transaction.

Step 2- Retail clerks greet customers pleasantly.

So why is it important to always greet customers pleasantly?

Survey data has revealed that customers will forgive issues such as having waited a little longer in line than desired if they are subsequently greeted in a professional, pleasant manner.

Step 3- Retail clerk inquiries to determine customer need(s)

Why is it so important to make an appropriate inquiry as to the need(s) of the customer?

Much research reveals that one of the principal reasons for customer need(s) not being fulfilled is that they are not clearly understood. The basis for fulfillment of customer need(s) has to begin with as thorough an understanding as possible of what the particular need is. This activity box begins that inquiry.

This a critical step where the **Retail** Clerk needs to gain full **understanding as to what the customer needs. The key factor is, does the customer** have an item to mail or not. All of the key questions are asked **only for customers with an item to mail. If on the other hand the customer simply desires stamps, information, pick up hold mail, etc. then move through step 4A (left box) and proceed down to step 9, or the S of GIST box.**

Again, if the customer has an item to mail, proceed to:

Step **4B-** (right box)- If the customer has an item to mail.

The Hazardous mail issue can come into play at this point for packages, complete a visual inspection of the item and follow Hazardous Mail acceptance procedures. This is a FAA requirement that is regulated by the Department of Transportation.

Step 5- Retail clerk asks, "When do you want the item to arrive?"

So why is it so important to ask the customer when he/she wants their item to arrive?

This question prevents the need to have to necessarily cover multiple mail classes and corresponding service standards for each.

Customers are sometimes confused about the mail classes we offer. Such things as price and time to deliver distinguish our mail classes. Asking this key question rapidly gets us to the point.

Receiving the customer response allows the Retail Clerk to best respond to the next activity in the transaction.

Step 6- Retail clerk recommends class of mail.

Knowing the time requirement of the customer best positions the Clerk to offer appropriate class(s) that fits the customer's expectations of when they want the item to get there. Where multiple services would meet the needs offer those options. Do not assume that a customer automatically wants the least expensive means of delivery. Remember that certain corresponding special services are only offered with particular mail classes so again, recommending more than an option, where appropriate, is most important.

Step 7- Retail clerk explains features and benefits.

So why is it important to explain the features of the recommended class of mail?

A clear understanding of expectations sets the stage for the best fit of services able to meet those needs. Explaining the features of the recommended class of mail gives one additional level of assurance that the right recommendation has been offered as the customer can accept or chose from another option, if available.

Step 8- Customer selects mailing option, offer special services.

Once the mail class has been appropriately selected the additional options available. Again, this is saving the need to cover special services not offered with the mail class of choice. Also, people often hold misconceptions about our services. As an example our Consumer Affairs offices have experienced instances where the customer was under the assumption that the USPS offers automatic insurance for up to \$100~00, or that an article has to be of a certain value to be insurable. One of the following questions would be "Do you need Insurance" or "how much insurance do need?" The process calls for all appropriate special services for the mail class of choice to be offered as again, another element of Suggest, of GIST.

The next step converges both the "item to mail" and the "non item to be mailed" of the process flowchart. Therefore, they to be considered for additional items to purchase as well as resuming wlth the rest of the activities designated in the Process.

Step 9- Retail clerks suggests one additional item.

Remainng high on the Postal Service's list of priorities is REVENUE GENERATION. When we have a customer to serve, there is a tremendous opportunity for both the USPS and the consumer. We have multiple products/services to offer to the customer. Now is the time to pursue the possible selling opportunity keeping in mind that we should do so to meet the needs of the customer. Recent

published information indicates that an additional TWO MILLION DOLLARS per accounting period of additional revenue could be realized by having insurance, delivery confirmation and return receipt sold on but three parcels a day in all of our retail outlets.

Please note- This is where customers who did not have an 'item to mail'. Therefore, they are considered for additional items to purchase as well as resuming with the rest of the activities designated in the Process.

Step 10- Retail clerk offers payment options

So why is it important to offer debit/credit card payment options?

We live in a credit card society. Most consumers do not want to carry cash. Many consumers still do not know that we now accept debit/ credit cards as a form of payment (one study taken indicated that only 19% of those surveyed were aware that the USPS accepts debit/credit cards). The cash back element of the on-line debit card transaction is very attractive to many customers. As for the USPS, debit/credit card payments cost less to process so these transactions make good business sense. Debit/Credit card transactions also reduce cash intake making closeout easier. Finally, where Liberty Cash Cards are available another possible selling opportunity arises.

Step 11- Retail clerk completes financial transaction.

Properly closing out the retail transaction makes sense for the consumer, the USPS and the Retail Clerk. Consumer integrity is maintained by offering proper change or proper handling of an administrative payment. For the USPS, revenue protection integrity is maintained. For the Retail Clerk, financial integrity is maintained for fixed credit audits.

Step 12A/B- Thank customer. Our customers leave USPS with services rendered.

So why is it important to thank a customer appreciatively at the conclusion of the transaction?

People remember the last impression given; therefore we want that to be a most positive one. As was stated earlier, the customer is why we exist. They have alternatives today like never before. New alternative 'mail services stores' thrive for a reason. When our customers leave our Retail Units satisfied we have gained the greatest assurance that **WE WILL SEE THEM AGAIN!**

Consider this question- "If every one of our Retail Clerks were to follow this process with every customer for every transaction, everywhere, everyday, what do you think our Mystery Shopper, Sales Skills, and Customer Satisfaction Measurement scores will look like?"

Positive scores either upward trends or satisfactory scores in general, should result.

RETAIL SALES SKILLS PROCESS

[8/08/2000]

Step 1- Customer is at USPS Retail outlet for service(s)

Step 2- Retail Clerk greets customer pleasantly (G of GIST)

Step 3- Retail Clerk Inquires to determine customer need(s) (I of GIST)

Step 4A- If the customer has other needs such as; money orders, mail pick-up, desire for stamps only, needs information only, etc., assist customer followed by proceeding to 'suggest at least one additional item' *

Step 4B- If the customer has an item to mail, follow each of the following steps depicted in this Process
**When accepting a parcel, refer to HAZARDOUS MAIL acceptance procedures

Step 5- Retail Clerk asks, 'When do you want the item(s) to arrive?' (I of GIST)

Step 6- Retail Clerk recommends class of mail (S of GIST)

Step 7- Retail Clerk explains features of the recommended class of mail

Step 8- Once the customer selects mailing option, Retail Clerk offers appropriate special services such as; Del. Conf., Cert., Regis., Ret. Receipt, Ins., Merch. Ret. Receipt., Restricted. Del., COD, Cert. of Mlg. (S of GIST)

Step 9- Retail Clerk suggests at least one additional item (S of GIST)

Step 10- Retail Clerk offers Debit/Credit payment option (cash, check(s), money orders, Liberty Cash Cards [where appropriate] are other options)

Step 11- Retail Clerk completes appropriate financial transaction.

Step 12A- Retail Clerk thanks customer appreciatively (T of GIST)

Step 12B- Our customer leaves USPS with service(s) rendered

Role Play

The Instructor then introduces two 'mock' transactions that are role-played. See attached

Retail Sales Skills Transaction Process Role Play #1

Task: Customer with item to mail

1 Sales and Services Associate: (smiling) "Good morning may I help you."

Customer: (indifferent) "Doing OK,"

2. Sales and Services Associate: (cheerful) " I see you have a package, "(inspect package for proper packaging, addressing, DOT labels or ORM-D markings) " Does it contain any thing potentially hazardous?"

Customer: "No its just some toys for my nephew"

Sales and Services Associate: " When would you like it to arrive"?

Customer: "Ah I don't know, sometime this week I guess."

. Sales and Services Associate: "Would two or three days be okay, or does it need to be there sooner."

Customer: " Yeah two days is great".

3 Sales and Services Associate: "May I suggest Priority Mail, your package should arrive in two days, and because it only weighs five pounds it doesn't cost any more to send it all the way to California, as it would if you were sending it in town here."

Customer: "That would be great."

4. Sales and Services Associate: " Would you like to insure your package?" " You can purchase up to \$50 worth for only **.85** cents."

Customer: "It's worth \$75 dollars."

Sales and Services Associate: " \$75 dollars of coverage is only \$1.80."

Customer: "Perfect, I'll take it."

Sales and Services Associate. "Delivery Confirmation is only **.35** cents, and allows you to know when your package was delivered."

Customer: "How?"

Sales and Services Associate:" You can access delivery information either through a 1-800 number or our web site which you'll find printed on your mailing receipt."

Customer: " Fantastic, I'll take it."

Retail Sales Skills Transaction Process Role Play #1 (cont.)

_____ 5 Sales and Services Associate: (Processes transaction using props if provided)

_____ 6 Sales and Services Associate: "Do you need any stamps today, or perhaps a phone card?"

Customer: "You know I could use a book of stamps."

_____ 7. Sales and Services Associate: "Would you like to use your debit or credit card to pay for your purchase?"

Customer: "I believe I'll just pay with cash."

Sales and Services Associate: "Your total is \$15.50 out of \$20" (count change back to customer)

Sales and Services Associate: "Thank you for choosing the Postal Service, and have a great day."

Retail Sales Skills Transaction Process Role Play #2

Task: Customer Transaction That Does Not Involve Mailing An Item

_____ 1. Sales and Services Associate: (cheerfully) " Good morning may I help you."

Customer: " Yes please, I need some stamps."

_____ 2. Sales and Services Associate: " How many do you need, and would you like to see some **commemoratives**. Perhaps the Celebrate the Century series."

Customer " I need the stamps for work, so just the **flags** will be OK, and I need 300 of them."

_____ 3. Sales and Services Associate: " Sure thing, I'll just zap three coils for you. Do you need any **stamps for yourself, or is there anything else I can get for you today?**"

Customer: " You know I probably do, let me take a look at those celebrate the whatever ones."

_____ 4 Sales and Services Associate: " Celebrate the Century has a sheet of 15 stamps for each decade of the twentieth century. People mailed in ballots to vote for the stamp subjects of the particular **decade. Here's the 1990's which features a stamp of the television show Seinfeld, as well as the movie Titanic.**"

Customer: " That's pretty cool, I would never expect Seinfeld to have a stamp. I'll take a sheet of those."

_____ 5 Sales and Services Associate: " Great I'll get you one. Would you like to pay for your purchases separately?"

Customer: " Yes I would."

_____ 6. Sales and Services Associate: " **Will** you be putting either of these purchases on a debit or credit card?"

Customer: " I **have** a company check **for** the **rolls** of **stamps**, and I'll use my debit card for my stamps."

_____ 7. Sales and Services Associate: " That's \$99 dollars for the 300 hundred stamps." (Process the payment **for the rolls of stamps**) " One sheet of 1990 Celebrate the Century is \$4.95. Would you like cash back on your debit card purchase?"

Customer: " Wow the post office can do it all now. Sure I need some cash for lunch, give me \$20.

_____ 8. Sales and Services Associate: (Process payment) " Thank you, and have a great day"

Customer: "Thanks I will, and thanks for showing me those cool stamps!"

What key question(s) were not asked?

What lost opportunities do you feel were evident?

How do you think the customer felt at the conclusion of that transaction?

Were any elements of GIST short-changed or ignored altogether?

Retail Sales Skills Process Management System

This part of module 1 simply offers the identical Retail Sales Skills process covered in part (2) in Process Management System format. This will be for the discretionary use of those **offices** familiar with and preferring to leverage Process Management disciplines.

The essential process here in was reviewed in module I-part 2; the notes here **will simply** emphasize some of the **unique** characteristics that the Process Management System offers.

The narratives offered in this module in part 2 apply to the activity boxes in the **PROGRESS CHART** of part 3.

The vertical configuration of the **PROGRESS CHART** clearly distinguishes activities and who/whom is responsible for their **execution**.

The **PROGRESS CHART** has 7 process measures, all of which are corresponding to specific questions in the Mystery Shopper survey. This allows for integration and monitoring of this process against the Mystery Shopper program and the tracking of success.

The **PROGRESS CHART** has 1 result measure that again is already systemic and allows for the ongoing tracking of success of the entire output of this standardized retail transaction process.

Both sets of measures (P's & R) allow for the entire process to be managed, hence we truly realize usage of a Process Management System.

The **PROGRESS CHART's** miscellaneous column allows for an extensive array of information. These clarify several items within the process, such as the list of special services.

The left-hand column denotes the separation of the entire process's activities into 5 principal steps. This sets the stage for future analysis for the determination of time frames involved with process execution.

USPS PROCESS MANAGEMENT SYSTEM

PROCESS OWNER: Nancy Laich 202 268-5548
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FILE NAME: rss.vsd

Process Description: Retail Sales Skills (micro)	Process Customer: USPS Retail Customers	Customer Valid Requirements: Courteous, Knowledgeable, Helpful Transactions,	Outcome Results Indicator(s): 100% Courteous, Knowledgeable, Helpful Transactions
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Position Step/ Time	Process Flowchart		Process and/or Results Indicators		Checking			Misc. Information	
	CUSTOMER	RETAIL CLERKS	Process Control Charts	Control Limits	Checking Item	Frequency	Responsibility	Contingency Plan	include: Abbreviations Procedures Remarks, etc.
Open Trans	Customer at USPS Retail Outlet for Service		Outcome Results Indicator Charts	Specs/Targets	What to check	When to check	Who checks	Action Req'd for Exception	G.I.S.T. = Greet, Inquire, Suggest(s), Thank # = I.E. Passport Meter Setting, Stamps, Info. Etc * = Delivery Confirmation, Certified Registered, Return Receipt, Insurance, Merchandise Return Receipt, Restricted Delivery, C.O.D., Certificate of Mailing † = Debit / Credit Cards, Cash, Check(s), Money Orders, Liberty Cash Cards (where appropriate) \$ = When accepting a parcel, refer to HAZARDOUS MAIL acceptance procedures
Core Transaction	Greet Customer Pleasantly (G of GIST)								
	Inquire to Determine Customer Need(s) (I of GIST)								
	Other Customer Needs #	Have Item(s) to Mail \$							
	Ask: "When do you want the item(s) to arrive?" (I of GIST)								
	Recommend Class of Mail (S of GIST)								
Add. Trans.	Explain Features of Recommended Class of Mail								
	Customer Selects Mailing Option								
	Offer Appropriate Special Services (S of GIST) *								
Payment	Suggest At Least One Additional Item (S of GIST)								
	Offer Debit/Credit Payment Option †								
Close Trans.	Execute Appropriate Financial Transaction								
	Thank Customer Appreciatively (I of GIST)								
Customer Leaves USPS with Service(s) Rendered									

Rev #	Date	Revision Description	By	Appr.
	4/26/00	First Draft	RS	Team
1	5/19/00	change payment option box & R1	JKS	Team
2	6/15/00	change header to Retail Clerks, add HazMat footer	JKS	Team

Action Plan 2

This final part of module 1 contains a blank Action Plan template and a completed Action Plan 2 referred to previously in the Supv. Retail Sales Skills process and the Sales Skills matrix.

Action Plan 2 has previously been referred to in the Supervisor Retail Sales Skills Matrix and the Supv. Retail Sales Skills Process Management System. It is an important document in that it describes **those activities necessary to be completed by the designated Postmaster, Mgr., or Supv.** to complete the Sales Skills rollout. This Action Plan should be understood by all participants so that there is total understanding of what responsibilities individuals have to the over-all process.

Although it is felt that it is essential to complete items 1-5, item 6 and any additional ones are **left** up to local discretion. This is in an attempt to allow for the supplementing of the five items if any particular District feels there are more items they would like to accomplish in meeting their **ultimate Sales Skills objectives,**

This Action Plan contains items inclusive in both the Supervisor Retail Sales Skills Matrix, and covered extensively in the Sales Skills Training Program.

Field Action Plan (2)

<u>What</u> needs to be done	<u>How</u> to do the "what"	<u>Who</u> is doing the "what"	<u>Time</u> how much time for the "what"	<u>Measure</u> what is going to confirm the "what" got done
1. Orient/set expectations for execution of standard retail transaction process	Preferably, one-on-ones	Management	NTE 11/20/00	Documentation of all responsible clerks oriented
2. Plan/execute weekly interactive "Retail Talks"	Interactive one-on-ones or group setting	Management or Designee	Ongoing (weekly)	"Retail Talk's Log" documented
3. Conduct employee/lobby observations	Monitor transactions, observe lobbies	Management	1 per A/P, per clerk	Documented mandatory forms
4. Execute coaching techniques	One-on-one, team interactive, etc	Management	Ongoing	Indicators: positive CSM, RUP, Mystery Shopper Scores, increased revenue
5. Appropriately recognize	Exceptional performance should be awarded. Cumulative performance problems addressed via National/Local Agreement procedures. Look for other recognition opportunities.	Management	Ongoing	Local VOE Indicators
6. Other Activities (list):	*	*	*	*
* Local Decision				

Appendix

Standard Retail Transaction

Instructions

The following employee training is an important part of the Sales Skills Management Process.

Review with each retail clerk the RETAIL SALES SKILLS PROCESS (attached). Explain each step of the process, give examples and explain (attached are **talking points to assist you**).

When you have completed the explanation of the RETAIL SALES SKILLS PROCESS with the retail clerks AND THEY UNDERSTAND, proceed to the role plays.

Role-Plays: Attached **are** two role-play scenarios.

Scenario One: Involves customer transaction **WITH an item to mail**.

Scenario Two: Involves customer transaction **WITHOUT** an item to mail

Ask for volunteers and do a role play with both of these scenarios,

Proceed to next step.

Retail Talk:

The attached Retail Talk (Let's Talk Retail) will serve as official training for retail clerks (with a national course number assigned). Prior to delivery of the Retail **Talk, you** should ensure retail clerks understand that a result of this new process will be the standardization of customer transactions.

Give the Retail Talk to ALL retail clerks and ensure they understand the contents. Document this employee training in coordination with your local PEDC.



Let's Talk Retail

Standard Retail Transaction

- ❖ **What is a Standard Retail Transaction?** It is a way to ensure the ability to offer consistent, efficient, professional services at every location, every day, every time by every retail clerk.
- ❖ **Why have a Standard Retail Transaction?** Using a Standard Retail Transaction ensures that we cover all elements of GIST (Greet, Inquire, Suggest, Thank), maximizes customer satisfaction and provides the opportunity to add to our revenue base.
- ❖ **How does a Standard Retail Transaction work?** The retail transaction process provides a standard **roadmap** for all retail clerks to follow. Each step provides an explanation of the clerks action. However, retail clerks are afforded some flexibility based on the specific transaction. For example, a customer picking up "hold mail" does not need to be asked the question, "*When does it need to arrive?*" The retail clerk should, however, suggest an item to purchase such as stamps or phone cards. Also, questions may be put in the retail clerks own words providing the steps are not circumvented. For instance, a clerk might ask, "*How quickly do you want that to arrive?*"



Question: Is this just another use of Mystery Shopper?



Answer: No. It is about a Standard Transaction Process that involves all the GIST elements and produces a dialog between the retail clerk and the customer. With this process, everybody wins. The customer receives the same services every day from every retail clerk. The retail clerk demonstrates they are the ultimate professional and the USPS is recognized as the premiere provider of postal services in the 21st century.

Local Notes



Retail Sales Skills Transaction Process Role Play #1

Task: Customer with item to mail

_____1 Sales and Services Associate: (smiling) "Good morning may I help you."

Customer: (indifferent) "Doing OK,"

_____2. Sales and Services Associate: (cheerful) " I see you have a package, "(inspect package for proper packaging, addressing, DOT labels or ORM-D markings) " Does it contain any thing potentially hazardous"?.

Customer: "No it's just some toys for my nephew"

Sales and Services Associate: " When would you like it to arrive"?

Customer: "Ah I don't know, sometime this week I guess."

.Sales and Services Associate: "Would two or three days be okay, or does it need to be there sooner."

Customer: " Yeah two days is great".

_____3 Sales and Services Associate: "May I suggest Priority Mail, your package should arrive in two days, and because it only weighs five pounds it doesn't cost any more to send it all the way to California, as it would if you were sending it in town here."

Customer: "That would be great."

_____4. Sales and Services Associate: " Would you like to insure your package?" " You can purchase up to \$50 worth for only .85 cents."

Customer: "It's worth \$75 dollars."

Sales and Services Associate: " \$75 dollars of coverage is only \$1 .80."

Customer: "Perfect, I'll take it."

Sales and Services Associate: "Delivery Confirmation is only .35 cents , and allows you to know when your package was delivered."

Customer: "How?"

Sales and Services Associate:" You can access delivery information either through a 1-800 number or our web site which you'll find printed on your mailing receipt."

Customer: " Fantastic, I'll take it."

_____5 Sales and Services Associate: (Processes transaction using props if provided)

_____6 Sales and Services Associate: " Do you need any stamps today, or perhaps a phone card?"

Customer: " You know I could use a book of stamps."

_____7. Sales and Services **Associate**: " Would you like to use your debit or credit card to pay for your purchase?"

Customer: " I believe I'll just pay with cash."

Sales and Services Associate: "Your total is \$15.50 out of \$20" (count change back to customer)

Sales and Services Associate: "Thank you for choosing the Postal Service, and have a great day."

Training Worksheet

.8 OJI w i l l

Trainee will

.9.

.10 OJI w i l l

Trainee will

Certification

Trainer will restate the task, then the trainee will complete tasks from start to finish.

_____ Completed Steps

_____ Not Completed Steps

Comments: (please include those steps that were missed in this section):

Date: _____

Trainer: _____

Trainee: _____

Retail Sales Skills Transaction Process Role Play #2

Task: Customer Transaction That Does Not Involve Mailing An Item

_____ 1. Sales and Services Associate: (cheerfully) " Good morning may I help you."

Customer: " Yes please, I need some stamps."

_____ 2. Sales and Services Associate: " How many do you need, and would you like to see some **commemoratives**. Perhaps the Celebrate the Century series."

Customer " I need the stamps for work, so just the flags will be OK, and I need 300 of them."

_____ 3. Sales and Services Associate: " Sure thing, I'll just zap three coils for you. Do you need any stamps for yourself, or is there anything **else** I can get for you today?"

Customer: " You know I probably do, let me take a look at those celebrate the whatever ones."

_____ 4 Sales and Services Associate: " Celebrate the Century has a sheet of 15 stamps for each decade of the twentieth century. People mailed in ballots to vote for the stamp subjects of the particular decade. Here's the 1990's which features a stamp of the television show Seinfeld, as well as the movie Titanic."

Customer: " That's pretty cool, I would never expect Seinfeld to have a stamp, I'll take a sheet of those."

_____ 5 Sales and Services Associate: " Great I'll get you one. Would you like to pay for your purchases separately?"

Customer: " Yes I would."

_____ 6. Sales and Services Associate: " Will you be putting either of these purchases on a debit or credit card?"

Customer: " I have a company check for the rolls of stamps, and I'll use my debit card for my stamps."

_____ 7. Sales and Services Associate: " That's \$99 dollars for the 300 hundred stamps."
(Process the payment for the rolls of stamps) " One sheet of 1990 Celebrate the Century is \$4.95. Would you like cash back on your debit card purchase?"

Customer: " Wow the post office can do it all now. Sure I need some cash for lunch, give me \$20."

8. Sales and Services Associate: (Process payment) " Thank you, and have a great day"

Customer: "Thanks I will, and thanks for showing me those cool stamps!"

Training Worksheet

Task: _____

_____.8. OJI will

Trainee will

.9. O J I w i l l

Trainee will

.10 O J I w i l l

Trainee will

Certification

Trainer will restate the task, then the trainee will complete tasks from start to finish.

_____ Completed Steps

_____ Not Completed Steps

Comments: (please include those steps that were missed in this section):

Date: _____

Trainer: _____

Trainee: _____

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Module 2: Product Knowledge

OBJECTIVE: Upon completion of this module, the student will have increased awareness of products and services and related resource manuals and publications.

- The student will be able to discuss the importance of product knowledge
- The student will be able to enumerate the various types of products/services available
- **The student will be able to reference post office manuals and directives regarding products/services**
- The student will be able to list features and benefits of selected postal products

Time Allocated for Module:

- 2 hours

Instructional Methods:

- Lectures
- Discussions
- Handouts
- Role Play

Summary:

- This module reinforces knowledge of USPS Products and **Services. Its goal is to provide supervisors and managers with easy access to print and electronic media, enabling them to be used as an additional resource to our customers while enhancing their knowledge base.**

Participant Material Used:

- Consumers Guide (PUB 123)
- **Domestic Mail Manual**
- International Mail Manual
- Postal Bulletins

- Priority Mail Global Guaranteed Service Guide
- Retail Products and Services Handbook (PO-130)
- Sales Skills Tool Kit

For Further Information

Contact Cheryl DuBois, Retail Specialist, Northland District, 651-293-6143.

Importance of Product Knowledge

Product Knowledge

Product Knowledge is:

- Knowing our products/ services
- Having a willingness to share that knowledge
- Empowerment to employees to be able to make the 'Correct Sell'

It is important to have Product Knowledge because it gives our **employees personal satisfaction in helping a customer, as a manager** establishes creditability to employees, provides an interaction between the retail clerk and customer and creates a loyal, satisfied and returning customer.

Product Knowledge is:

- **Power**
- Being the Expert
- **Being** the Vendor of Choice

Pretest

1. The length and girth of an acceptable parcel cannot be over _____ inches.
2. Insurance is not available for international items paid at the S _____ P _____ rate of postage.
3. The three types of return receipts are:
(Match the first column to the second column)

A. International Return <u>Receipt</u>	1.PS3811
B Domestic Return Receipt _____	2.PS381 IA
C. Request for Return Receipt After <u>Mailing</u>	3.PS2865
4. All registered articles should be declared at f _____ v _____
5. Name the three types of stamps:

6. The holding time period of insured mail is _____ days
(unless time is initialed by mailer.)
7. A PS 8105-A is used when the same person purchases postal money orders of \$ _____ to \$ _____
8. c _____ O _____ D _____ is the mail service for customers who wish to mail articles for which they have not paid. The _____ pays the amount the mailer indicates is due when the article is delivered.
9. The D _____ M _____ M _____ contains rules, regulations and instructions regarding domestic postal services, classes and types of mail.

10. A Letter Card is a prepaid stored value **card used** to purchase postal products and services.
11. A money order may be purchased with cash, debit or credit.
12. Direct Deposit is the electronic money transfer from the U.S.A. to Mexico.
13. Philately is the collecting and study of postage stamps and other postal materials.
14. Priority Mail is the guaranteed two business day delivery to most locations in Western Europe countries and territories.
15. A special service that will provide easy to use access to delivery information at a low cost is Delivery Point Confirmation.
16. The electronic product that allows a customer to print on an envelope or mailing label is PostageNet postage.
17. Only Priority Mail and Parcel Post pieces that weigh less than 70 pounds and have a combined length and girth of more than 84 inches up to 108 inches are subject to the balloon rate. The parcel is charged the same amount as if it weighed 70 pounds, regardless of its actual weight.

Standard Mail (B)

Subclasses:

Surcharges incurred with Standard Mail (B):

Reference Manuals and Materials

Fill in the blanks from the selected manual and publication titles:

Priority Mail Global Guaranteed

Consumer's Guide to Postal Service and Products

Postal Products and Services (HB PO-I 30)

Domestic Mail Manual

Postal Bulletin

International Mail Manual

Notice 123-Ratefold

- _____
Contains current instructions and fast issuance of permanent directives to be placed into appropriate manuals when updated. This contains additional information such as stamp information, invalid corporate accounts, missing, lost, stolen money orders, military mail information and Retail "What's In Store" messages.
- _____
This is a 10 panel foldout that contains all domestic **rates** and fees in a concise and accessible manner.
- _____
This manual sets forth policies, regulations and procedures governing international mail services provided to the public by the U.S.P.S.
- _____
This Pamphlet is the principal consumer publication for the Postal Service. It contains easy-to-read information on a wide range of postal services and products.
- _____
This handbook is a simple guide to specific information about special and premium services, stamp and philatelic items, retail merchandise, money services, item numbers, and **AIC's**.
- _____
This book contains **guidelines** on participating countries in PMGG.
- _____
This manual **contains rules, regulations and instructions regarding the** postal service and classes and types of mail. It contains internal operating procedures.

Additional Publications

- PUB 2-Packaging for Mailing
- PUB 51-International Postal Rates & Fees
- PUB 52-Hazardous, Restricted & Perishable Mail
- PUB 124-Product Sell Sheets (Domestic and International Mail Rates in several languages)
- PUB 300A-Crime Prevention
- PUB 370-Extra Services
- Memo to Mailers-(<http://wwwnational.pcc.usps.com>)
Mailing address: **National Customer Support Center**
USPS
6060 Primacy Pkwy Ste. 201
Memphis TN 38188-I 001
- The Mailers Companion-(mcompani@email.usps.gov)
Mailing address same as Memo to Mailers
- Philatelic Catalog (www.stampsonline.com) or I-800-STAMP24

All items unless noted may be ordered from:

Material Distribution, Topeka KS I-800-332-031 7

Features and Benefits

A _____ is the component of a product or service.

A _____ is the way a product or service features can help the customer.

A customer **will** return if they have understood the features of the product and why it is beneficial to them. The close of each transaction is the beginning of the next.

- Features and Benefits of Domestic Mail Services

- Features and Benefits of International Mail Services

- Features and Benefits for Additional Products

Product Know/edge = power by being the experts who share that knowledge with our customers.

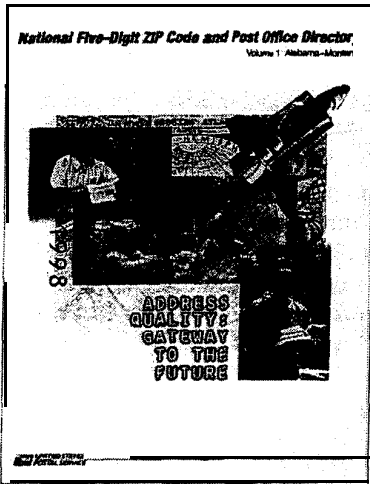
Domestic Mail Classes and Services

Class of Mail	First Class	Priority Mail	Standard B	Special Standard	Express
Service & Forms					
Certified PS3800	X	x			
Registered PS 3806	X	X			
Insured (\$50 or less) PS 3813	X	X	X	X	
Insured (More than \$50) PS 3813-P	X	X	X	X	Automatic \$500 on merchandise
Return Receipt PS 3811	X	X	X	X	X
C O D PS 3816	X	X	X	X	X
Registered COD	X	X			X
Certificate of Mailing PS 3817	X	X	X	X	
Delivery Confirmation PS 152		X	X	X	
Return Rec for Merchandise PS 3804		X	X	X	

International Classes of Mail

****Service & Timing Dependent upon Individual Countries**

Class	Priority Mail Global Guaranteed	International Express Mail	Global Priority	Air Parcel Post	Surface
Delivery Standard	2 business days	2-3 days	4-5 days	7-14 days	6-8 weeks
Type of Service					
Track & Trace	X	X			
Proof you mailed it	X	X**	X(additional fee)		
Guaranteed Delivery	X**				
Proof they received it	X**				
Insurance	X (\$100 document Reconstruction)	X (automatic \$500)		AirParcel Post to certain countries. Not letter, small packets, printed matter	Parcel Post to certain countries. Not letter, small packet or printed matter
Delivery Records	X (30 days)	X (6 months)			



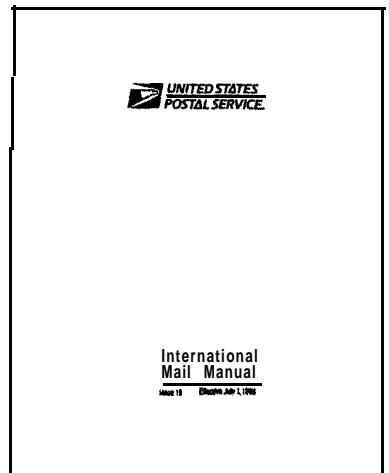
National Five-Digit ZIP Code and Post Office Directory

Pub. 65

This publication lists, by state, ZIP Codes for the entire United States. It also provides information on Postal Service organizations, with maps and mailing addresses of customer service and sales offices, processing and distribution facilities, Inspection Service offices, postal business centers, rates and classification service centers, airport mail facilities, and facilities service centers. It may be ordered from the Postal Service, National Customer Support Center (telephone: 1-800-238-31 50).

International Mail Manual

This manual explains the conditions and procedures for mail sent from the United States to other countries and received from other countries. It is available to the public by subscription from the Superintendent of Documents, U.S. Government Printing Office, 710 N. Capitol St., NW, Washington, DC 20402-9371 (telephone: 202-512-1 800).



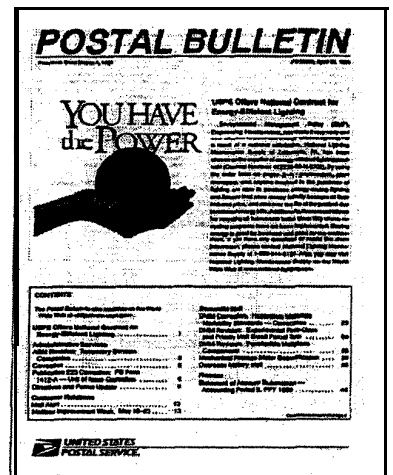
FIRST-CLASS MAIL		RATEFOLD	
Weight	Rate	Weight	Rate
1 oz	0.10	1 oz	0.10
2 oz	0.15	2 oz	0.15
3 oz	0.20	3 oz	0.20
4 oz	0.25	4 oz	0.25
5 oz	0.30	5 oz	0.30
6 oz	0.35	6 oz	0.35
7 oz	0.40	7 oz	0.40
8 oz	0.45	8 oz	0.45
9 oz	0.50	9 oz	0.50
10 oz	0.55	10 oz	0.55
11 oz	0.60	11 oz	0.60
12 oz	0.65	12 oz	0.65
13 oz	0.70	13 oz	0.70
14 oz	0.75	14 oz	0.75
15 oz	0.80	15 oz	0.80
16 oz	0.85	16 oz	0.85
17 oz	0.90	17 oz	0.90
18 oz	0.95	18 oz	0.95
19 oz	1.00	19 oz	1.00
20 oz	1.05	20 oz	1.05
21 oz	1.10	21 oz	1.10
22 oz	1.15	22 oz	1.15
23 oz	1.20	23 oz	1.20
24 oz	1.25	24 oz	1.25
25 oz	1.30	25 oz	1.30
26 oz	1.35	26 oz	1.35
27 oz	1.40	27 oz	1.40
28 oz	1.45	28 oz	1.45
29 oz	1.50	29 oz	1.50
30 oz	1.55	30 oz	1.55
31 oz	1.60	31 oz	1.60
32 oz	1.65	32 oz	1.65
33 oz	1.70	33 oz	1.70
34 oz	1.75	34 oz	1.75
35 oz	1.80	35 oz	1.80
36 oz	1.85	36 oz	1.85
37 oz	1.90	37 oz	1.90
38 oz	1.95	38 oz	1.95
39 oz	2.00	39 oz	2.00
40 oz	2.05	40 oz	2.05
41 oz	2.10	41 oz	2.10
42 oz	2.15	42 oz	2.15
43 oz	2.20	43 oz	2.20
44 oz	2.25	44 oz	2.25
45 oz	2.30	45 oz	2.30
46 oz	2.35	46 oz	2.35
47 oz	2.40	47 oz	2.40
48 oz	2.45	48 oz	2.45
49 oz	2.50	49 oz	2.50
50 oz	2.55	50 oz	2.55
51 oz	2.60	51 oz	2.60
52 oz	2.65	52 oz	2.65
53 oz	2.70	53 oz	2.70
54 oz	2.75	54 oz	2.75
55 oz	2.80	55 oz	2.80
56 oz	2.85	56 oz	2.85
57 oz	2.90	57 oz	2.90
58 oz	2.95	58 oz	2.95
59 oz	3.00	59 oz	3.00
60 oz	3.05	60 oz	3.05
61 oz	3.10	61 oz	3.10
62 oz	3.15	62 oz	3.15
63 oz	3.20	63 oz	3.20
64 oz	3.25	64 oz	3.25
65 oz	3.30	65 oz	3.30
66 oz	3.35	66 oz	3.35
67 oz	3.40	67 oz	3.40
68 oz	3.45	68 oz	3.45
69 oz	3.50	69 oz	3.50
70 oz	3.55	70 oz	3.55
71 oz	3.60	71 oz	3.60
72 oz	3.65	72 oz	3.65
73 oz	3.70	73 oz	3.70
74 oz	3.75	74 oz	3.75
75 oz	3.80	75 oz	3.80
76 oz	3.85	76 oz	3.85
77 oz	3.90	77 oz	3.90
78 oz	3.95	78 oz	3.95
79 oz	4.00	79 oz	4.00
80 oz	4.05	80 oz	4.05
81 oz	4.10	81 oz	4.10
82 oz	4.15	82 oz	4.15
83 oz	4.20	83 oz	4.20
84 oz	4.25	84 oz	4.25
85 oz	4.30	85 oz	4.30
86 oz	4.35	86 oz	4.35
87 oz	4.40	87 oz	4.40
88 oz	4.45	88 oz	4.45
89 oz	4.50	89 oz	4.50
90 oz	4.55	90 oz	4.55
91 oz	4.60	91 oz	4.60
92 oz	4.65	92 oz	4.65
93 oz	4.70	93 oz	4.70
94 oz	4.75	94 oz	4.75
95 oz	4.80	95 oz	4.80
96 oz	4.85	96 oz	4.85
97 oz	4.90	97 oz	4.90
98 oz	4.95	98 oz	4.95
99 oz	5.00	99 oz	5.00
100 oz	5.05	100 oz	5.05

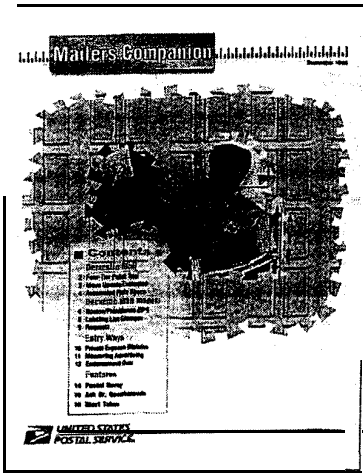
Notice 123

Notice 123, *Ratefold*, is a 1 O-panel foldout that contains all domestic rates and fees in a concise and accessible manner. Available from postal business centers (see G041) or account representatives.

Postal Bulletin

This periodical is published every 2 weeks and mailed to Postal Service installations and public subscribers. It communicates instructions and changes in policy and standards. Notices are effective for 1 year unless they revise permanent standards or specify a different period. The *Postal Bulletin* is available to the public by subscription or single issue from the Superintendent of Documents, U.S. Government Printing Office, 710 N. Capitol St., NW, Washington, DC 20402-9371 (telephone: 202-512-1 800).





The Mailers Companion

A free monthly USPS newsletter that provides the latest USPS information essential for effective mailings. It includes up-to-date information about *Domestic Mail Manual* revisions, Classification Reform, mail processing networks, postage payment systems, address management, mailing standards, rulings, interpretations, and other relevant issues as well as a column for readers' questions and comments. To receive this newsletter, mail a request that includes the name of your organization to The Mailers Companion, U.S. Postal Service, 6060 Primacy Pkwy., Ste. 201, Memphis, TN 38188-0001; or fax the information to The Mailers Companion, 901-681-4582.

Memo to Mailers

Memo to Mailers is a free monthly newsletter from Postal Service Corporate Relations for mailers and mailing specialists. It provides information about Postal Service products and services, as well as changes taking place in the mailing industry. To receive this newsletter, write to: Memo to Mailers, National Customer Support Center, 6060 Primacy Pkwy., Ste. 201, Memphis, TN 38188-0001.



Postal Addressing Standards

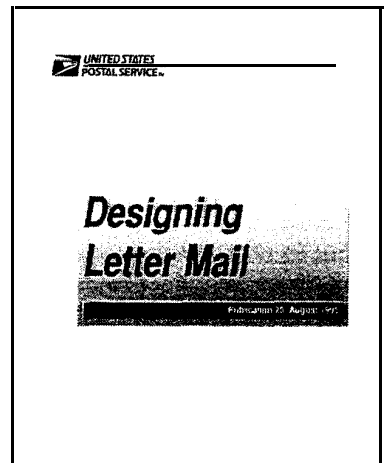
Pub. 28

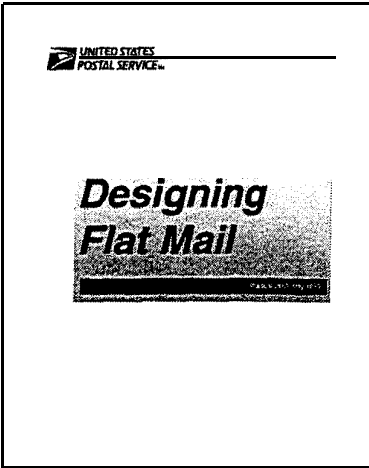
This publication describes standardized address formats for mail. Developed by the Postal Service and the mailing industry, standardized addresses enhance mail processing and delivery while reducing undeliverable-as-addressed mail. This publication includes standard abbreviations for streets, counties, highways, and business terms. It also includes Address Information Systems products and services. Available from postal business centers (see G041) or account representatives.

Designing Letter Mail

Pub. 25

This publication shows how to design letter-size business mail for improved service and postage savings. It includes specifications for graphic artists, printers, envelope manufacturers, form designers, and computer programmers. Available from postal business centers (see G041) or account representatives.





Designing Flat Mail

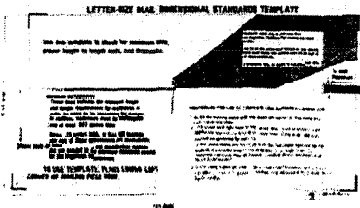
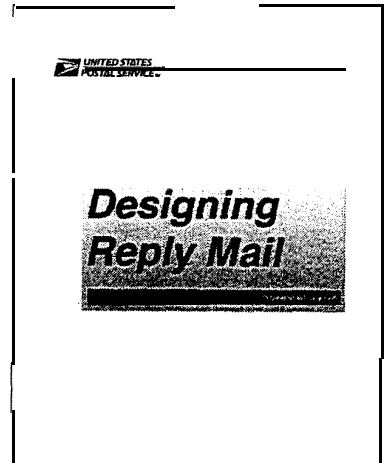
Pub. 63

This publication shows how to design flat-size mail to qualify for postage discounts. It includes guidelines for designing flat-size mail to meet the physical characteristics and address standards of Postal Service flat sorting machines. Available from postal business centers (see G041) or account representatives.

Designing Reply Mail

Pub. 353

This publication explains the two basic types of reply mail: business reply mail (BRM) and courtesy reply mail (CRM). By using these special reply formats and features, you can increase response time for your mailing. **This publication includes detailed specifications for designing BRM and CRM cards, window envelopes, and self-mailers.** Available from postal business centers (see G041) or account representatives.



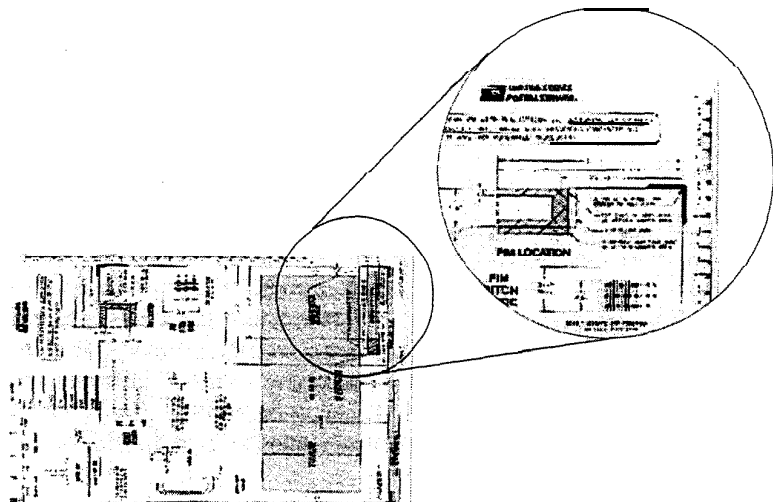
Letter-Size Mail Dimensional Standards Template Notice 3A

This tool shows the minimum and maximum sizes for letter-size mailpieces and explains when a nonstandard surcharge is required. Available from postal business centers (see G041) or account representatives.

Automation Template

Notice 67

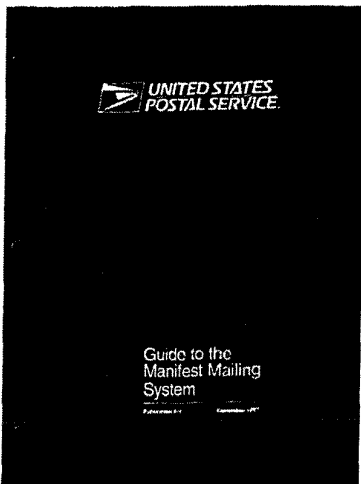
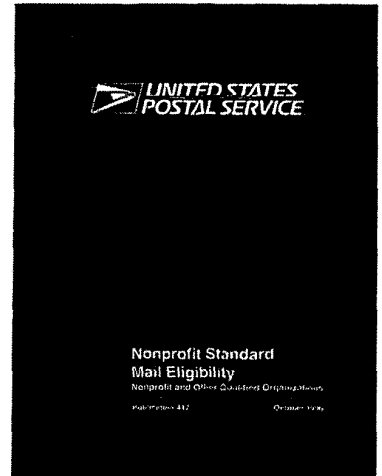
This plastic tool aids in designing letter-size mail for automated processing. It includes mailpiece dimensions, placement guides for key information, and print specifications. Available from postal business centers (see G041) or account representatives.



Nonprofit Standard Mail Eligibility

Pub. 417

This publication discusses eligibility, authorization, and mailing rules for the Nonprofit Standard Mail rates. It explains the categories or organizations that are eligible for the rates, how to request authorization, and how to determine whether a mailing meets the general standards for the rates. The publication also contains case studies and questions and answers about applying the content-based restrictions. Available at postal business centers (see G041).



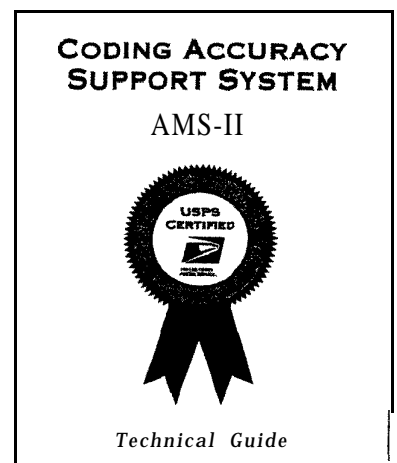
Manifest Mailing System

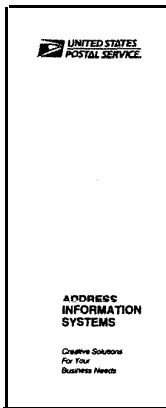
Pub. 401

This step-by-step guide provides all the information needed to participate in the Manifest Mailing System (MMS). For mailers who send 200 pieces per mailing, MMS can simplify postage payment. By following these guidelines, your system not only will meet the Postal Service technical and administrative standards but will also provide you with other benefits manifest mailing offers. Available from postal business centers (see G041) or account representatives.

Coding Accuracy Support System

This guide covers the Coding Accuracy Support System (CASS), a service that allows mailers, service bureaus, and software vendors to verify the accuracy of ZIP+4 codes, Carrier Route Information System data, and 5-digit coding. Sample addresses are provided for coding to evaluate the accuracy of your own in-house matching software. The guide shows how to obtain CASS certification. It may be ordered from the Postal Service, National Customer Support Center (telephone: 1-800-233-31 50).





Address Information Systems

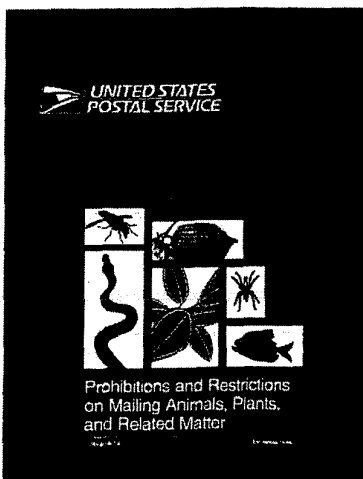
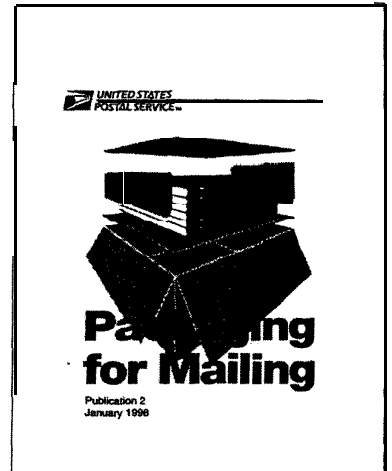
Pub. 40

This pamphlet describes the address list services available through the National Customer Support Center to help mailers improve the deliverability and effectiveness of their mailing lists. Available from postal business centers (see G041) or account representatives.

Packaging for Mailing

Pub. 2

This publication contains technical information on proper packaging materials and instructions on cushioning and sealing specialty items. Available at post offices.



Prohibitions and Restrictions on Mailing Animals, Plants, and Related Matter

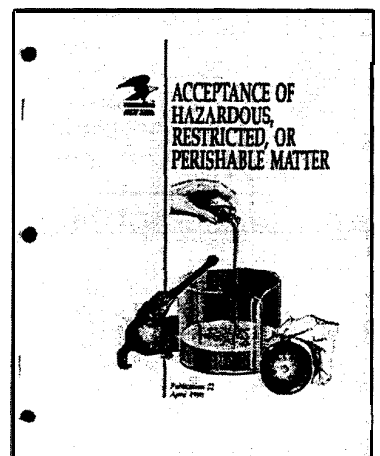
Pub. 14

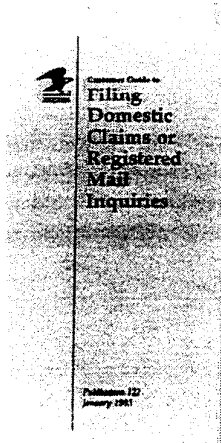
This publication highlights federal and state restrictions on mailing plants and plant products within the United States. In general, plants and plant products are mailable within the United States, its territories, and its possessions. To prevent the spread of plant pests, diseases, and insect infestations, shipping plants through the mail is subject to certain rules and inspections. Available at post offices.

Acceptance of Hazardous, Restricted, or Perishable Matter

Pub. 52

This publication is for mail acceptance employees, marketing specialists, and others who must decide whether and under which conditions hazardous, restricted, and perishable materials are mailable. The book outlines general and specific mailability standards for harmful materials that present significant danger or are frequently presented for mailing. An appendix lists these materials. Available at post offices.





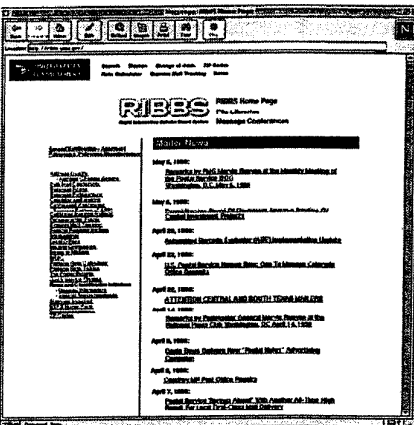
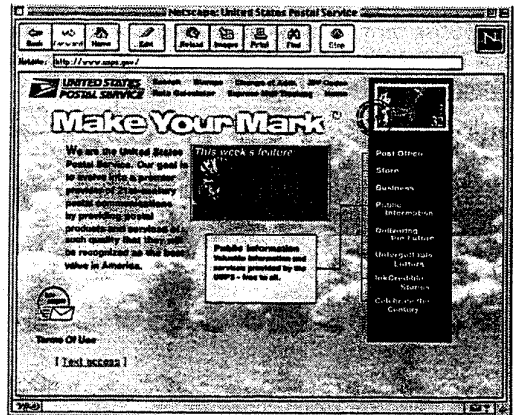
Customer Guide to Filing Domestic Claims or Registered Mail Inquiries

Pub. 122

This step-by-step guide provides instructions for filing a postal insurance inquiry or claim for lost or damaged domestic mail. Following these steps ensures an expeditious processing and settlement of claims. This guide contains checklists on time limits for filing a claim and explains which forms to use. Available at post offices.

USPS Home Page

The USPS World Wide Web Home Page provides a wealth of postal information including: Classification Reform updates; address quality information (including addressing products and services, CASS- and NCOA-certified vendors, MLOCR service bureaus, and ZIP+4 code lookup); mailing forms; publications (including *The Mailers Companion*, *Postal Bulletin*, and *Memo to Mailers*); stamp information; news releases; and links to foreign postal administrations. The USPS Home Page is at <http://www.usps.gov>.

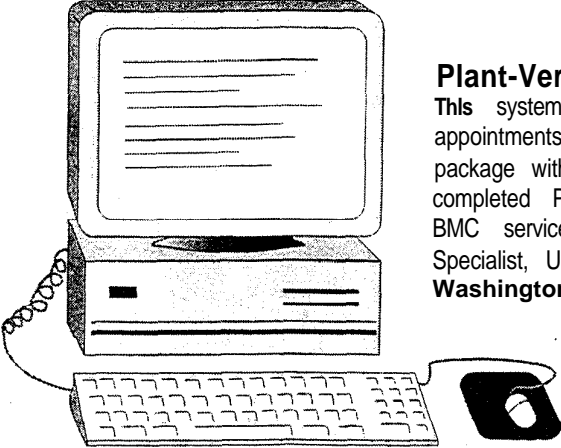


Rapid Information Bulletin Board Service (RIBBS)

RIBBS allows customers to access postal information, ask and receive answers to questions on products and services, and discuss postal issues with other customers and postal employees. RIBB may be accessed on the World Wide Web at <http://ribbs.usps.gov/public/default.htm> or through a direct dial-up connection using the following configuration:

Data Bits	8
Parity	None
Stop Bits	1
Terminal Emulation	ANSI (if not available, try VT100 or VT102)
Phone Number	1-800-262-9541. Include any prefixes required for outside lines
Baud Rate	2,400 to 14,400

Available information includes address list management services, press releases and speeches, postal rates, weather conditions affecting delivery, BMC condition reports, and *Federal Register* notices. To obtain a RIBBS User's Guide, call the National Customer Support Center at 1-800-238-31 50.

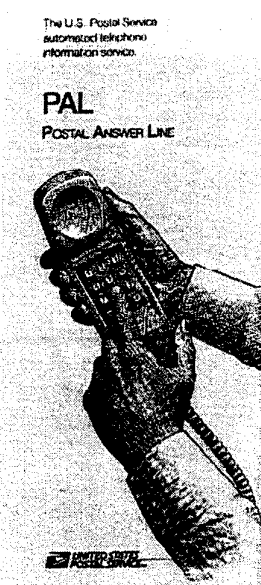
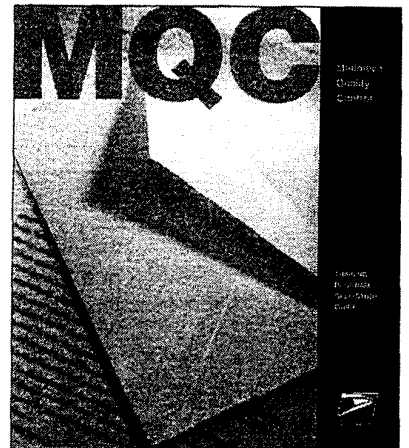


Plant-Verified Drop Shipment Appointment System

This system provides mailers with direct, electronic access for making appointments for plant-verified drop shipments. A communications package with modem and baud rate of 2,400 to 14,400 is required. Submit completed PS Form 1357, available from account representatives and BMC services specialists, to: Leonard J. Wierzbicki, Transportation Specialist, U.S. Postal Service, 475 L'Enfant Plaza SW, Rm. 7676, Washington, DC 20260-7117 (fax: 202-268-4368).

Mailpiece Quality Control (MPQC) Training Program

A self-study course to aid in designing mailpieces with an emphasis on automated mail processing. Includes workbook, video, DMM, and reference materials. Required for Systems Certification participants, but recommended for all mailers. Available from rates and classification service centers (see G042).



Postal Answer Line

Pub. 349

This brochure introduces consumers to the Postal Answer Line, an automated telephone information service that provides recorded responses to common inquiries. The system can also calculate postage rates, 24 hours a day, 7 days a week. This brochure is available at post offices in areas served by the Postal Answer Line.

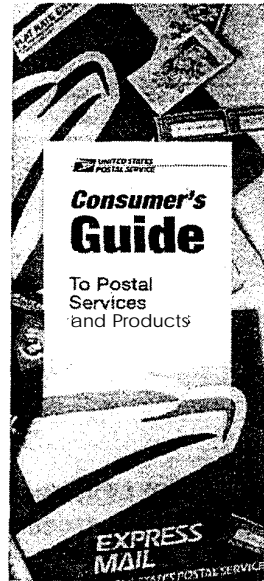


Crime Prevention

Pub. 300, *A Consumer's Guide to Postal Crime Prevention*

Pub. 301, *Postal Crime Prevention: A Guide for Businesses*

These publications explain mail fraud, mail theft, chain letters, lotteries, mailroom security, and mail bombs. Also published in Spanish. Available at post offices.



A Consumer's Guide to Postal Services and Products

Pub. 201

This pamphlet is the principal consumer publication for the Postal Service. It contains easy-to-read information on a wide range of postal services and products. This pamphlet covers mail classes, instructions for addressing and packaging mail, and lists of special services. It is also published in Spanish. Available at post offices.

*Mailing Free Matter
For Blind and Visually
Handicapped Persons
Questions and Answers*



Mailing Free Matter for Blind and Visually Handicapped Persons

Pub. 347

This pamphlet answers the most common questions about free matter for the blind and other visually handicapped persons. Most problems can be resolved by calling or visiting your local post office. Questions on policy issues may be sent to the Consumer Advocate, USPS Headquarters.



The Postal Service Guide to U.S. Stamps

This guide contains over three hundred pages of color pictures and information about every U.S. postage stamp issued since 1847. Its reference section explains stamp collecting words and phrases, organizations, publications, resources, and a list of the 460 USPS philatelic centers. Ordering information is also included for first day covers, ceremony programs, souvenir pages, commemorative panels, and the standing order subscription service.

Product Features and Benefits

Product	Features	Benefits	
Express	Fastest Set-vice Guaranteed next day (dependent on location)	*Proof of Mailing *Delivery Records kept 6 months *Proof of receipt with an extra charge,	*Free Supplies: labels, envelopes, boxes *Tracking of delivery status at 800-222-1811
Priority	Two to three day targeted delivery	* Speedy service at a low price *Proof of mailing and return receipt available for an additional fee	*Free Supplies: Mailing labels, envelopes, boxes *Free Saturday delivery
Delivery Confirmation	Economical proof of mailing	*Verbal or electronic delivery information *Proof of Delivery receipt (available for an additional fee) *Electronic delivery records kept 180 days	*May be combined with Insurance, COD, Registered Mail. *Available on Priority or Standard Mail (B) only.
Return Receipt	Card mailed back to you showing who signed for the article and delivery date	*Proof of receipt *Delivery records kept when used with Certified, Registered Mail, Express Mail, COD and Insured Mail over \$50.	"Delivery Confirmation available for a fee with Priority or Standard Mail (B)
Return Receipt for Merchandise	Economical proof of mailing copy of delivery information returned to you	*Proof of mailing *Proof of Receipt *The smart way to send merchandise you do not need to insure	*Delivery records kept for one year.
Registered Mail	Safest, most secure service for valuables	*Proof of mailing *Proof of receipt and Delivery Confirmation available for a fee *Insurance available for up to \$25,000	*Delivery records kept for two years at recipients post office *Smart way to send jewelry, gold, irreplaceable items
Certified Mail	Proof of mailing, signature required upon delivery	*Smart way to send tax and legal documents *Second notice is left if recipient not available for signature on delivery	*Article held for 15 days *Records kept at recipients post office for two years
Certificate of Mailing	Economical way to prove when an item was mailed	*Inexpensive way to provide proof of when an item was mailed and to whom. *No additional services available	*No delivery records or proof of receipt is available
Insurance	Item can be insured for up to \$5,000	*Peace of mind *Proof of mailing *For an additional fee - restricted delivery	*Proof of receipt, electronic and delivery status available.
Collect on Delivery	Merchandise sent to customers who do not wish to pay in advance	*Sender must pay postage and COD charges *Postage along with merchandise charges reimbursed after articles is delivered *Items held for 30 days unless other arrangements made	*For an additional fee - proof of receipt, electronic and verbal delivery status available *COD service has \$5000 maximum * Delivery records held for 2 years

FirstClass Phonecard

- **Competitively** priced with other flat rate cards within our retail category
- **As a flat rate card, is a better value when used for placing short calls** (90% of all calls placed with a phone card are under 5 minutes)
- Has no hidden fees
- Has only a one minute pay phone usage fee
- Rounds up to the next minute, not two or three minutes
- Can be recharged giving customers the convenience of using same access and PIN and limiting trips to purchase new cards
- Has **24/7** customer service
- **Has a reputation** with customers that “Minutes last a lot longer!”

Remember, every time you send your customer to a competitor, you are giving them poor value and losing revenue for the P o s t a l Service.

* Prices quoted 6-26-00

Retailer	Advertised Per-minute charge*	Connection Fee*	Pay phone usage fee*	Total cost of a 1 minute call*	Total number of minutes used fo 1 minute call*	Type of card
7 - 11	.029 cents per minues	.69 cents	2 minutes	.77 cents	26 minutes	Surcharge
ifxxon	.059 cents per minute	.79 cents	2 minutes	.97 cents	16 minutes	Surcharge
FirstClass PhoneCard	.25 cents per minute	None	1 minute	.50 cents	2 minutes	Flat Rate
James & Noble	.25 cents per minute	None	1 minute	.50 cents	2 minutes	Flat Rate
AMEX Travel Offices	.33 cents per minute	None	1 minute	.66 cents	2 minutes	Flat Rate
CVS Drug	.33 cents per minute	None	2 minutes	.99 cents	3 minutes	Flat Rate

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Module 3: Coaching For Performance

Terminal Objective:

Upon completion of this module, the student will be able to coach, set goals and provide feedback to retail clerks under his/her supervision.

Enabling Objectives:

The student will be able to:

- Define coaching
- Identify the benefits of coaching
- Describe the supervisors/managers role of coach and motivator
- Explain the dynamics of building an effective team
- Set SMART goals
- Evaluate employee performance using tools from the Sales Skills Toolkit.

Time Allocated for Module:

- 2 hours

Instructional Methods:

- **Lecture**
- **Discussion**
- **Role-play**

Participant Material Used:

- Participant's Guide

For Additional Information Contact:

Marilynn Hertz, A/Manager, Retail Gateway District, 314 436 6505 or Cheryl Thompson, Retail Operations Analyst, 636 733 5027.



*Coaching is the
process of letting
people know that
what they do
matters to you.*

Why does this matter? How do you show it? What skills do you need to do it well?



UNITED STATES
POSTAL SERVICE

PERFORMANCE ISSUES WHEN TO USE TRAINING VERSUS COACHING

TRAINING IS USED WHEN:

THERE ARE CHANGES IN EQUIPMENT
THERE ARE CHANGES IN PROCEDURES
THERE ARE CHANGES IN RESPONSIBILITIES

COACHING IS USED WHEN:

ABILITY EXCEEDS PERFORMANCE
FINE TUNING OF SKILLS IS NEEDED
ERRORS INCREASE



So you see, coaching is used to help employees overcome the barriers that keep them from performing at acceptable or peak levels; employees already have the knowledge or abilities, but performance is not at the desired level.

The Practical Coach

Key Points

Coaching is letting people know that what they do
_____ to you.

Coaching should be done:

1 _____

2 _____

3 _____

Never let good work go unnoticed. When **you** _____ it,
_____ it. Be _____

The Two Minute Challenge

1. State what you've _____
2. Wait for a _____
3. Remind individual of the _____
4. Ask for a specific _____
5. Agree _____

When delivering a "Two Minute Challenge", _____
_____ a step.

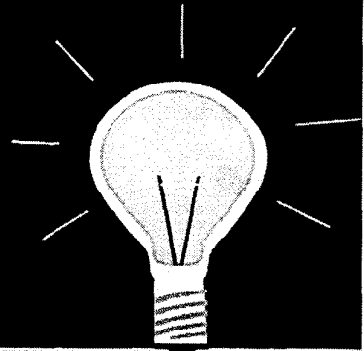
patient high-principled understanding illuminating interested inventive
CONCERNED inspiring clear caring ethical staunch up front helpful trusted unfailing
CONTAGIOUS friendly To the point Accepting clever up front helpful trusted stimulating
honest dedicated true Inviting moral positive
judicious Collaborative involved reflective
Dependable assured Consistent conscientious allegiant empathic scrupulous exciting
decent consistent evenhanded respected logical forthright flexible
impartial amiable discreet enthusiastic Responsive challenging innovative
imaginative straightforward candid adaptive
valued Effective excited loyal prudent appreciative persuasive direct observant
supportive cordial creative fair resourceful reliable
engaging intelligent encouraging guiding refreshing
CONFIDENT

patient high-principled understanding illuminating interested inventive unfailing
CONCERNED inspiring clear caring Accepting staunch ethical trusted
CONTAGIOUS friendly To the point clever up front helpful stimulating
honest dedicated Capable true Inviting positive
judicious moral involved reflective
Dependable assured Collaborative tactful scrupulous exciting logical flexible
decent conscientious allegiant empathic respected
impartial discreet evenhanded enthusiastic Responsive forthright sincere
amiable imaginative straightforward challenging innovative
constant valued Effective excited loyal candid adaptive
supportive prudent appreciative persuasive direct observant
engaging cordial creative fair resourceful reliable CONFIDENT
intelligent encouraging guiding refreshing



SMART GOALS

SPECIFIC
MEASURABLE
AGREED TO
REALISTIC
TIMED



Three Areas to Evaluate Retail Clerks

1. Sales/Customer Relations

Greets customers when they approach counter
Demonstrates product/service knowledge
Suggests additional products/services
Reinforces customer's decision and thanks them

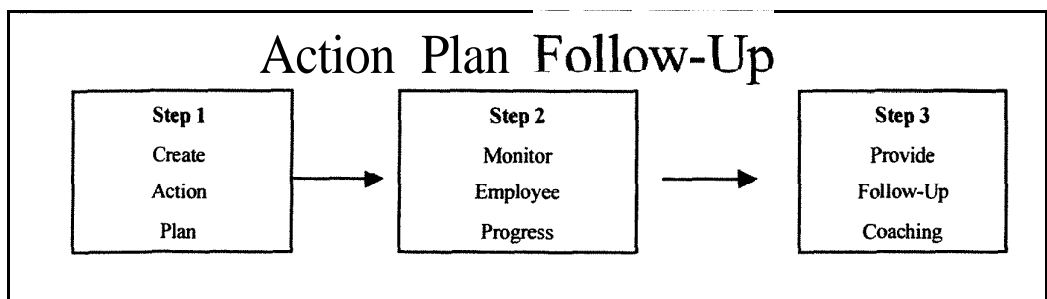
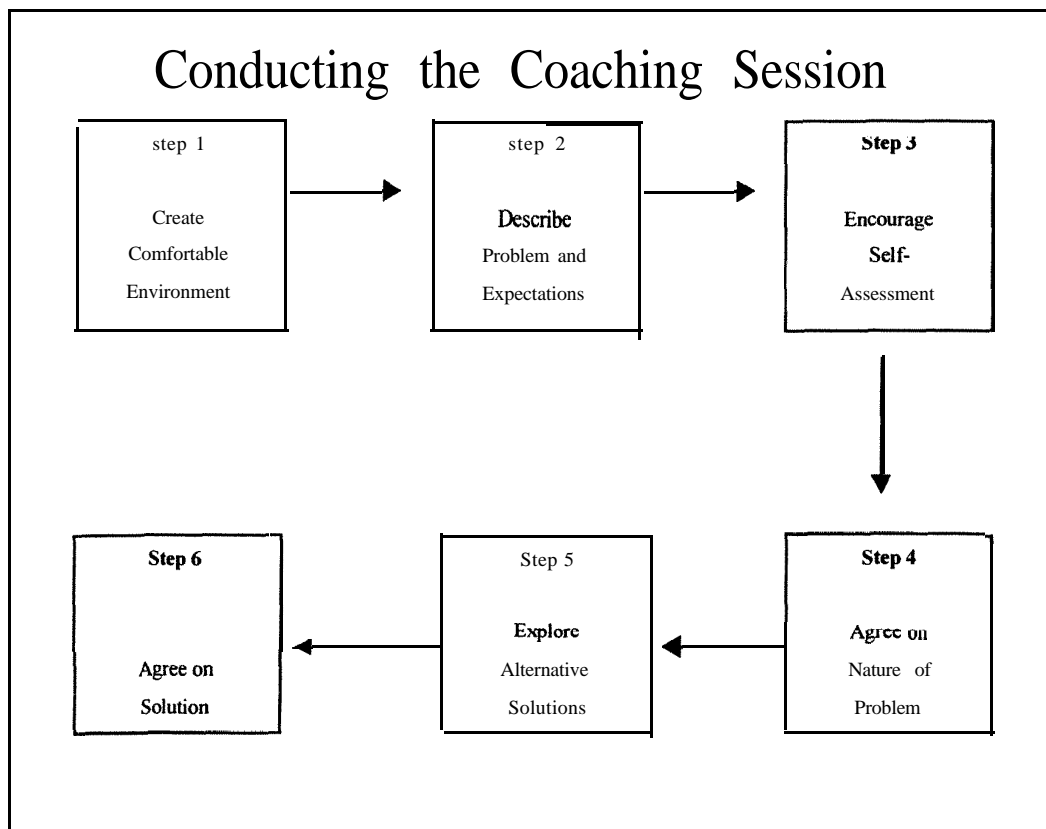
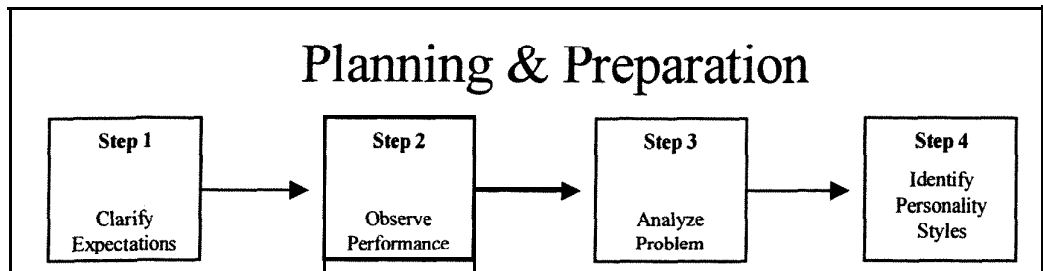
2. Operations

Lobby/counter appearance – free from clutter
Loss prevention – maintain security
Product display/merchandise control
Adheres to policy and procedures

3. Compliance

Uniform/Appearance

The Coaching Process



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Retail Employee Observation

Employee Name Emma Worker	Office Name Yourtown IL
Supervisor Name John Doe	ZIP Code 99999-9999
	Date 07/14/00 Time 3:15 PM

O n 07/14/00 you were observed by Supv . Doe
 The customers you waited on mailed:

A. Priority Pkg.	B. Letter	C.	D.	E.
OK	X			
NO	X			
NO	X			
NO	NO			
NO	NO			
NO	NO			
NO	NO			

Check marks show actions that were observed.
Note: items 2-4.

Only for letter or packages presented at time of mailing	1. Greet customer pleasantly.
	2. Ask "When do you want the item(s) to arrive"
	3. Recommend class of mail and explain feature and benefits.
	4. Offered any special services.
	5. Suggested an additional item to purchase.
	6. Informed the customer of the acceptance of debit/credit cards.
	7. Thank customer appreciatively.

Observer's Comments
 Got to tell her about that gum

Observer's Signature	Observer's Title
----------------------	------------------

Supervisor's Action Taken

Supervisor's Signature	Date	Employee's Signature	Date
------------------------	------	----------------------	------

Instructions

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. Management performs an employee observation at least once per accounting period, per retail clerk. Observes 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.

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Module 4: Observation/Recognition

Objective: Upon completion of this module the student will have the necessary tools to complete a valid observation, monitor performance, provide positive feedback to employees

Time Allocated for Module:

- 2 hours

Instructional Methods:

- Role Play
- Lecture
- Discussion

Summary:

- During this module we will review the following forms:
Retail Employee Observation Form
Employee Observation Log
Retail Lobby Observation Form
Customer Interview Log
- We will also explore the who, what, when, where, why and how of positive reinforcement

Participant Material Used:

- Student Workbook
- Retail Employee Observation Form
- Employee Observation Log
- Retail Lobby Observation
- Customer Interview Log
- Employee and Labor Relations Manual (ELM)

For Further Information

- Contact Jane Rahenkamp at 412-359-7571 or Mark Kielbasa at 860-285-7104

UNDERSTANDING PERFORMANCE - WE NEED TO KNOW HOW WE ARE DOING

Measuring Performance – It is like a report card!

The reason we measure performance is to know how we are doing. Measuring performance is something that many other companies do in many ways. Simply stated, thinking back to our school days, it is really like a report card. We may not always want to receive it all the time, but it brings news that we need to know about how we are doing-how we are performing in retail.

Sometimes we are comparing this performance to our achievement against goals. We also review how we are doing regarding customer related ways of measuring service, such as Mystery Shopper or CSM-R. Other times we are looking at business measurements, and looking at opportunities and how well we did in generating revenue. We are also looking at how well we are doing in providing consistent and quality service to our retail customers.

We review our performance scores to see which offices are performing well and those who can benefit from positive reinforcement and coaching. We want to spread success! The positive reinforcement and coaching is done, with an end in mind, to provide more consistent retail service to our customers.

Mystery Shopper is an important measure, showing us how we are doing

- Serving our customers
- Following key retail procedures

It provides a customer "snapshot" of retail service, based on a 'customer' evaluators visit to a post office and completion of a questionnaire about their visit.

Because all of the information is input in a computer Internet web site, Mystery Shopper evaluations, and report are available to you within 3 business days.

You may have heard about the Malcolm Baldrige Award through the **Postal Service, or through the news in some way. The award program** was established by Congress to recognize U.S. organizations for their achievements in quality and performance excellence.

The Postal Service received a great deal of feedback when we competed for the Baldrige Award, but did not receive it. We learned in the Baldrige Feedback Report that the Mystery Shopper program was considered strength for the Postal Service because it ties contact with customers directly with retail units and with our postal strategies.

Let's talk for a few minutes about how you can use Mystery Shopper as a process improvement tool.

Mystery Shopper reports five categories of information, with an overall score. In the interest of time, we are going to take one of the categories, Sales Skills and Product knowledge, and talk about how you can use the information to provide a useful tool. Mystery Shopper is one key measurement to show improvement when you go back to your offices and implement the things you will learn this week.

These Mystery Shopper reports, are several which will tell you how your **offices we doing in asking each of the sales skills** questions:

Response Distribution report

Category Ranking report

Analyzing the Category Ranking and Response Distribution reports in Mystery Shopper can tell you in detail how the post offices in your district are performing. You can quickly identify locations for recognition and coaching!! If you do not have these reports available to you directly from the Mystery Shopper web site, contact your Mystery Shopper District Coordinator who can assist you in getting the reports that you need.

The Postal Service has found that lobby observation and employee observation greatly improve the consistency and quality of service to our retail customers, especially in the sales skills and product knowledge area category. A key part of lobby observation and employee observation is to further analyze the information after you have completed the observations. Then compare it further to the performance measurement information you have, to see how you have improved.

As we discussed before, Mystery Shopper is like a report card, and we do need to know how we are doing. Mystery Shopper reports tell us about revenue opportunities that the Postal Service could achieve.

Why do we need to do these additional observations, doesn't Mystery Shopper do this for us?

instructions

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.

Retail Lobby Observation

FY

A/P

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 A/P.

Office Name _____	Postmaster/Manager Name _____
District _____	Reviewer Name _____

No.	Checklist	Y	N	N/A	Comments	Date Addressed
-----	-----------	---	---	-----	----------	----------------

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.)					

Sales/Skills/Product Knowledge (4-12)						
4.	Did the employee ask when the item needed to arrive?					
5.	Specify class(es) of mail offered: <input type="checkbox"/> Express Mail <input type="checkbox"/> Priority Mail <input type="checkbox"/> Other: _____					
6.	Did the employee offer the correct class of mail?					
7.	Did the employee explain any features of the recommended class of mail?					
8.	Did the employee offer any special services?					
9.	If Yes", specify the services offered: <input type="checkbox"/> Certified Mail <input type="checkbox"/> Return Receipt <input type="checkbox"/> Delivery Confirmation <input type="checkbox"/> Insured Mail <input type="checkbox"/> Proof of Mailing <input type="checkbox"/> Other: _____					
10.	Did the employee suggest an additional item to the purchaser?					
11.	Specify additional items offered:					
12.	Did the employee inform the customer that the USPS Accepts debit/credit cards?					

Courtesy and Professionalism (13-17)						
13.	Did the employee pleasantly greet the customer when the customer reached the counter?					
14.	Did the employee smile and make eye contact?					
15.	Did the employee present a clean, professional appearance?					
16.	Was the employee wearing the complete uniform?					
17.	Did the employee say "Thank you" or "Thanks"? If "NO", what was said (Specify): _____					

Retail Products and Services (18 - 19)						
18.	Check the items that were NOT available in the lobby: <input type="checkbox"/> ZIP Code Books <input type="checkbox"/> CI Domestic Return Receipt <input type="checkbox"/> CI Certified Mail Forms <input type="checkbox"/> CI Priority Mail Envelopes <input type="checkbox"/> CI Insured Mail Forms <input type="checkbox"/> Express Mail Envelopes <input type="checkbox"/> Delivery Confirmation Labels <input type="checkbox"/> International Supplies <input type="checkbox"/> Other: _____					
19.	Were packing supplies displayed and professionally labeled?					

Facility (20-23)						
20.	Was the exterior (including doors, landscaping, etc.) clean and well maintained?					
21.	Was the interior (including counters, floors, walls, windows, ceiling) clean and well-maintained, and trash cans not overflowing?					
22.	Were all signs professionally lettered and properly posted?					
23.	Was the employee's counter clean and well-maintained?					

instructions

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. Management performs an employee observation at least once per accounting period, per retail clerk. Observes 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

Employee Name	Office Name
	ZIP Code
Observer Name	Date
	Time

On _____ you were observed by _____
 The customers you waited on mailed:

A.	B.	C.	D.	E.	
					Check marks show actions that were observed. Note: items 2-4.
					1. Greet customer pleasantly.
					Only for letter or packages presented at time of mailing
					3. Recommend class of mail and explain feature and benefits.
					4. Offered any special services.
					5. Suggested an additional item to purchase.
					6. Informed the customer of the acceptance of debit/credit cards.
					7. Thank customer appreciatively.
Observer's Comments					

Observers Signature	Observers Title
---------------------	-----------------

Supervisors Action Taken

Supervisors Signature	Date	Employee's Signature	Date
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Employee Observation log

Unit Name: _____

Supervisor's Name: _____

EMPLOYEE OBSERVATION LOG													
Employee Name	Qtr I			Qtr II			Qtr III			Qtr IV			
	A/P 1	A/P 2	A/P 3	A/P 4	A/P 5	A/P 6	A/P 7	A/P 8	A/P 9	A/P 10	A/P 11	A/P 12	A/P 13
1													
2													
3													
4													
5													
6													
7													
8													
9													

Employee Observations:

Minimum ONE Observation form per Clerk, per A/P. Record date of review and initial box,

Retain 2 years

PERFORMANCE COACHING AND EMPLOYEE COOPERATION

The Average Employee

In general, about 90% of any given workforce come to work wanting to do a good job and willing to cooperate with management. This segment of the workforce needs you to provide them clear expectations and limits regarding work and behavior at work. They might not always perform at a stellar level but they try to give eight hours work for eight hours pay. As work processes change, this group will require coaching to assure smooth transition.

There is other information in your participant's guide referring to the other 10% and the Postal Services Expectation for Management. You can review this information at your leisure, as it is important to know.

Pygmalion Effect: we tend to set the behaviors we ask for by our words and our actions.

If we only expect poor performance, and only acknowledge poor performance, we will get more poor performance to deal with. When you make the "positive assumption" about the work motivation of most workers you will not be disappointed. Most people can tell when we "expect" good performance. Creating a work climate where positive reinforcement is freely given encourages more and more commitment to top performance and cooperation levels.

Sample Positive Reinforcements

INDIVIDUAL

- Verbal:** Personal conversations
"Thank you." "I appreciate your help."
Greeting people by name
Asking for advice
Conversations inquiring about interests in advancement
- Non-Verbal:** Smile, head nod, and handshake
Notes, postal trinkets,
Letters of Commendation
Special Achievement or SPOT Awards
Evaluations
Promotions
Gift certificates to restaurants
- Other:** Approving leave, even when busy
Employee of the Month
Special Projects or assignments
Having your manager come by the unit and thank the employees

WORK UNIT

- Verbal:** Stand up talks – keeping people informed
Applause for unit performance
Personal visits by senior managers
- Non-Verbal:** Articles in Postal publications, pictures or names in postings
Bulletin board postings of unit performance
Plaques or certificates of unit performance
- Other:** Coffee and donuts, pizza party, popcorn
Having your manager come by the unit and thank the employees

POSITIVE REINFORCEMENT: GUIDELINES

- Performance accomplishment as well as behavioral compliance with work place expectations must be recognized. The employee/team must formally hear the manager's /supervisor's appreciation.
- Performance **recognition** should be specific. Rather than "you did a good job" you should mention exactly what impressed you and why it's important to the job and work group.
- DO NOT use this discussion opportunity to bring up a new performance-coaching problem. Focus on the positive and adjourn.
- This formal recognition may take only a few minutes. No need to stretch it out.
- If the achievement level has been reached consistently in the employee's /teams work history, indicate that you appreciate the consistent model of leadership provided and possibly provide an award or other special recognition.

Another way to provide positive reinforcement is by using feedback and input from employees.

One of the most powerful ways to create a positive work place is to encourage and use feedback and input from employees. Employee input works to improve overall performance because it is:

- **Job focused**
- Benefits the customer
- **Saves money and improves efficiency**
- **Gives employees a sense of ownership**
- **Allows opportunities for advancement**
- **Improves your performance and team performance**

Methods to gather input:

9 Idea programs

- **Process improvement teams to study problems**
- **Standup meeting**
- **Informal discussion during breaks or meals**
- **Asking for ideas during walk-arounds**

Points to stress

- It is difficult to utilize employee input without a plan.
- In most cases you will not be successful if you rely on circumstance to get feedback
- Never use “coaching” situations as a means to get feedback
- Effective feedback discussions occur when you initiate the discussion
- Helpful input must be recognized: “thank you”, “that’s helpful,” “I didn’t know that.”
- Helpful input leading to action make sure you tell the employee what happened to the input.

Positive Reinforcement

- Describe the Performance Behavior Specifically: Indicate Appreciation
- Explain how it Helped the Organization, Team and Customer
- Indicate that you Expect the Behavior to Continue
- Provide Specific Expectations for Future Events
- If applicable: Use a Postal Service Aware, trinket, etc.
- Let the employee know you will be alert to reward future events
- indicate your confidence in the employee

Addressing Difficult Employees with Positive Reinforcement

Receiving positive reinforcement is a “choice” that should be the logical alternative to negative consequences for an employee. The more available and visible positive reinforcement is in your work unit the more attractive a choice it will become.

Given a choice between positive and negative consequences what would you take?

Employees must be more aware of the positive consequences than the negative if you are to achieve outstanding performance.

Positive consequences are generally public and visible. The more **positive energy you create in your work group the more positive the work place will become.** If you work hard at recognizing people for doing things right, you will find that negative behavior will decrease significantly.

Resistance and Defensiveness

Resistance may appear in the form of an employee who appears to hear your clarification of expectations but then continues to misbehave or not perform adequately.

Understand that we all carry around a tendency to be defensive when we feel our actions and behavior are being criticized or we're being treated **unfairly. You should not be surprised** when less cooperative employees react defensively, nor should you overreact to their behavior.

Defensiveness is acted out in many ways. Some people clam up and pout. Others will offer up lots of excuses such as “no one told me” “everyone else does it” or “the union steward will take care of this”.

Effectively dealing with Resistance and Defensiveness

Dealing with resistance and defensiveness of the uncooperative employee requires attention to the Four C's

- 1. Choice** Understand the employee always has a choice: compliance or consequences! You must emphasize that the employee has a choice and outline what the choice is. Choices are usually between "accepting accountability" for expectations or, choosing to accept the consequences of not meeting expectations.

- 2. Consequences** There must be consequences immediately after an employee chooses to disregard your coaching instruction or limit setting. The "employee consequence must be something the employee doesn't like but complies with article 16.

- 3. Consistency** You must be consistent in your treatment of employees. You must be consistent in follow through with coaching and consequences. You must be consistent in your coaching behavior and **style. You must** consistently act on violations of work and behavior exceptions.

- 4. Calm** Assertive coaching must be delivered in a calm, matter-of-fact manner, without hostility, without raising your voice. **You** control your behavior and your reaction. Don't let the defensiveness of the employee cause you to also behave inappropriately.

Consequences and the Postal Service Discipline Procedure

Outlined below are the elements of the Postal Service discipline procedure: these are not a Code of Penalties! They represent informal and formal personnel consequences for unacceptable performance agreed to in contract by the union and the Postal Service. They are typical elements of discipline found in other organizations.

Postal Service Discipline Procedure

FIRST	Discussion
SECOND	Letter of Warning
THIRD	7 DAY Suspension *
FOURTH	14 Day Suspension *
FIFTH	Removal *
* Higher level approval is required beyond a letter of Warning	

Instructions

The purpose of the customer interview form is to obtain customer feedback regarding their experience with a specific retail clerk

This includes:

- sales skills
- product knowledge
- courtesy & professionalism

Form Completion:

- Unit Manager or Designee
- Interviews to be conducted at varying times of the day
- Manager will provide both positive and negative feedback to employee
- Use this form in conjunction with the employee observation form

Step by Step Interview Techniques:

- Make sure your appearance is professional-wear a name tag
- Be customer selective-if customer appears angry or rushed do not select them
- Smile and introduce yourself include name and title
- Let customer know their opinion is important to you, and we work to continually improve service
- Request permission to question customer about services received
- Thank customer for their valued input

File and retain this form in the unit for at least 6 months

Customer Interview Form

Customer Interview # 1	Yes	No	COMMENTS	Employee Coached?
Retail Clerk:				<u>Yes/No</u>
Were you treated courteously & professionally?				
Were you asked when your item needed to arrive?				
Were any products, services or additional items suggested to you?				
Were you informed that we accept credit and debit cards?				
Do you mind the clerk asking you a series of questions?				
Customer Interview # 2	Yes	No	COMMENTS	Employee Coached?
Retail Clerk:				<u>Yes/No</u>
Were you treated courteously & professionally?				
Were you asked when your item needed to arrive?				
Were any products, services or additional items suggested to you?				
Were you informed that we accept credit and debit cards?				
Do you mind the clerk asking you a series of questions?				
Customer Interview # 3	Yes	No	COMMENTS	Employee' Coached?
Retail Clerk:				<u>Yes/No</u>
Were you treated courteously & professionally?				
Were you asked when your item needed to arrive?				
Were any products, services or additional items suggested to you?				
Were you informed that we accept credit and debit cards?				
Do you mind the clerk asking you a series of questions?				
Customer Interview # 4	Yes	No	COMMENTS	Employee Coached?
Retail Clerk:				<u>Y e s / N o</u>
Were you treated courteously & professionally?				
Were you askec when your item needed to arrive?				
Were any products, services or additional items suggested to you?				
Were you informed that we accept credit and debit cards?				
Do you mind the clerk asking you a series of questions?				
Comments:				
Supervisor: _____ Date: ____/____/____ Unit Name: _____				

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