UNITED STATES POSTAL SERVICE

Sales Skills
Management Process

Participant's Guide

Course 41201-00
NSN# 7610-05-000-4170
October 2000

Retail
Retail Operations/Retail Workforce Strategies

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Sales Skills Management Process

Participant's Guide

United States Postal Service
Retail
Retail Operations/Retail Workforce Strategies
475 L'Enfant Plaza SW
Washington, DC 20260-2442

Use of Training Materials

These training course materials are intended to be used for training purposes only. They have been prepared in conformance with existing USPS policies and standards and do not represent the establishment of new regulations or policies.

A Commitment to Diversity

The Postal Service is committed to fostering and achieving a work and learning environment that respects and values a diverse workforce. Valuing and managing diversity in the Postal Service means that we will build an inclusive environment that respects the uniqueness of every individual and encourages the contributions, experiences and perspectives of all people.

It is essential that our work and learning environments be free from discrimination and harassment on any basis.

In our classrooms, on the workroom floor, in casual conversation and in formal meetings, employees and faculty are asked to encourage an open learning environment that is supportive to everyone.

Course materials and lectures, classroom debates and casual conversation should always reflect the commitment to safety and freedom from discrimination, sexual harassment and harassment on any prohibited basis.

EAS training staff has a professional obligation to provide a safe, discrimination free and sexual harassment free learning environment. Instructors are expected to support this commitment. Class participants are asked to support the goal of zero tolerance of behavior that violates these commitments.

If you find course material that is presented in the classroom or in self-instructional format that does not follow these guidelines, please let an instructor know immediately.

If classroom discussions do not support these principles please point that out to the instructor as well.

Diversity is a source of strength for our organization. Diversity promotes innovation, creativity, productivity and growth, and enables a broadening of existing concepts.

The Postal Service's policy is to value the diversity of our employees, customers and suppliers, to do what is right for our employees and the communities we serve, thereby ensuring a competitive advantage in the global marketplace.

Contents

Module 1: The Retail Transaction

Objective: Participants will be able to describe and name the quality processes involved with the sales skills effort and see how the action plan tool is applied to implement these processes.

- Participants will be able to describe the supervisory process for the sales skills program.
- Participants will be able to describe both the PROCESS and the RATIONALE for standardization of the retail transaction, including elements 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

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 monitors progress to completion.

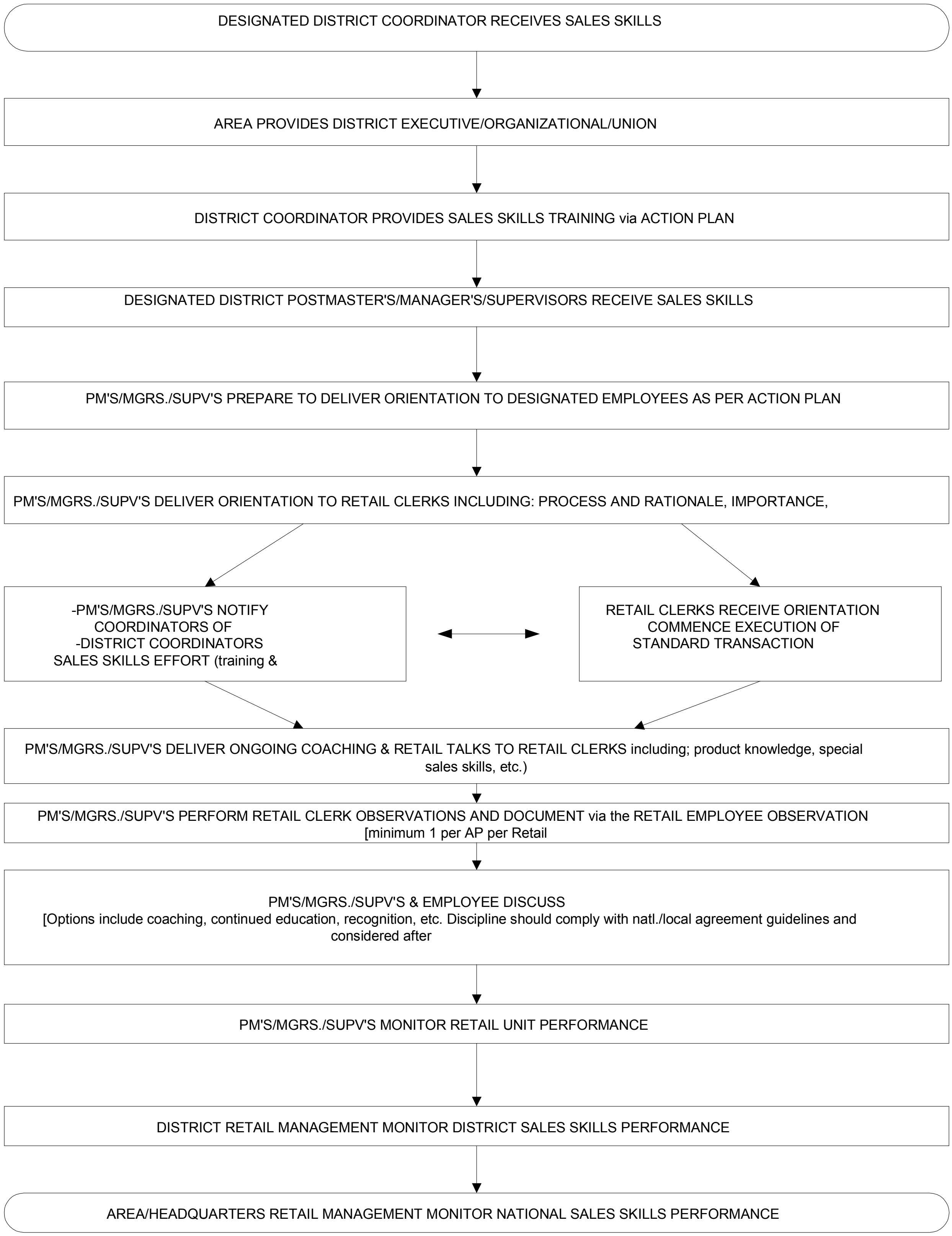
The third box of the matrix, Action Plan 1 will be described later in this document.

The fifth box from the top denotes how the information is delivered at the local level. The designated local manager delivers this information to retail clerks by using retail service talks.

The Sales Skills course prepares managers to deliver the items mentioned in boxes six and eight. This includes the 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.

SUPERVISOR RETAIL SALES SKILLS 'MATRIX' 8/08/2000



Retail Sales Skills Process Management System

A cross-functional team used certain quality tools including Process Management. Some components of the Process Management Systems will be introduced as part of this program.

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, the valid requirements the customer should derive from the process.

The main body is the process flowchart, which depicts all necessary activity steps in sequence, and aligns them vertically in accordance to who is responsible. As an example, the district is responsible for three activities handled principally by the district coordinator.

Activities depicted here are self-explanatory.

The process chart 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). P1 is a quantitative measure of those completing Sales Skills orientation, where P2 and R1 integrate indicators currently systemic.

The miscellaneous column on the far right offers additional clarification of content within the flowchart.

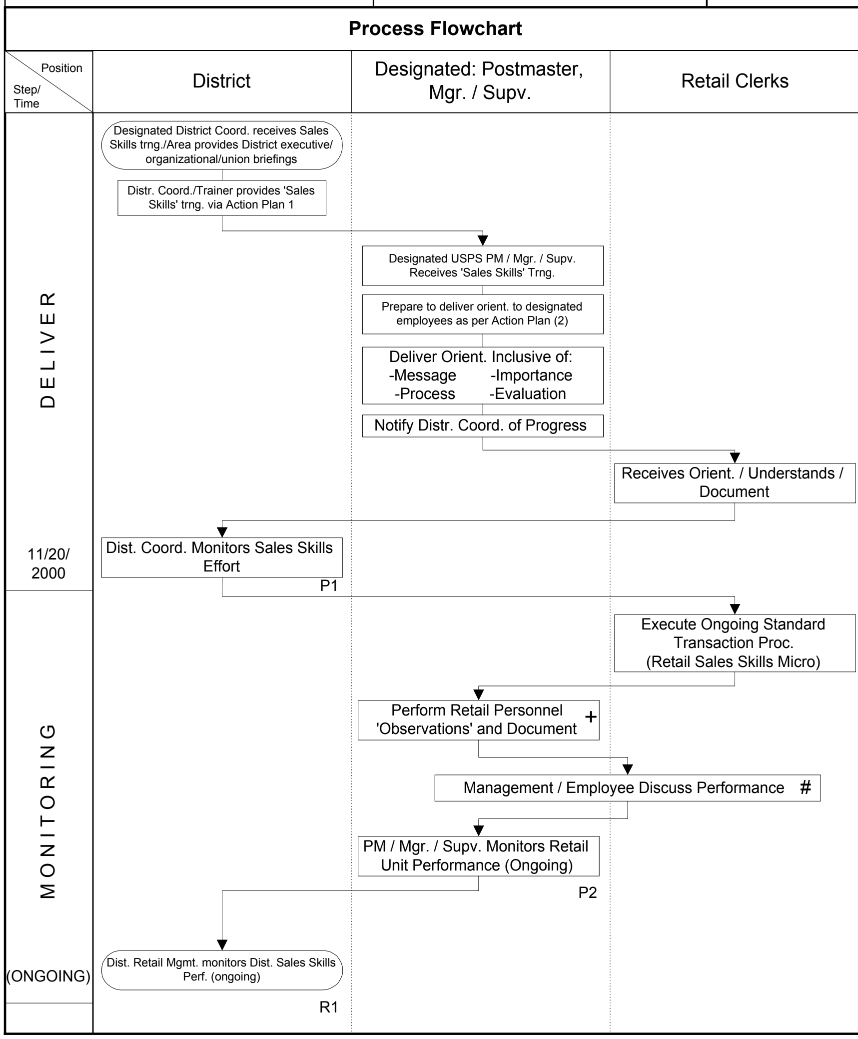
Finally, the far left-hand column splits the entire process in this case, into two steps. Each step has a time frame attached to it articulating expectations for that group of activities. You will note that as an example, it is expected that all targeted Retail Clerks should receive their respective standard retail transaction process orientation by 11/20/2000.

USPS PROCESS MANAGEMENT SYSTEM

PROCESS OWNER:	Nancy Laich	202 268-5548
	Lois Murphy	636 733-5132
QUALITY CONTACT:	John K. Schwarz	
PHONE NUMBER:	202 268-7721	
FILE NAME:	srss.vsd	

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

Process Flowchart



Process and/or Results Indicators: Process Control Charts / Outcome Results Indicator Charts	Checking: Control Limits / Specs/ Targets	Checking Item / What to check	Fre-quency / When to check	Respon-sibility / Who checks	Contingency Plan / Action Req'd for Exception	Misc. Information: Include: Abbreviations - Procedures - Remarks,etc.
P1= % Orient. Completed	100%	Docu-ments	Weekly	Dist. Coord.	Reminder	# = Options Include Coaching, Continued Education, Recognition, Etc.
P2= Monitor Scores of Retail Unit	TBD	CSM, Mys. Shop., Cust. Exit Interv. Etc!	AP	Unit Mgr. / Supv./ PM	Improv. Effort	# = Discipline Should Comply with Natl. / Local Agreement Guidelines and only be considered after Orient. / Observations / Coaching + = Minimum 1 Per AP Per Retail Clerk
R1= Sales Skill Dimension (RUPI) Total Score	Upward Trend TBD	RUPI, Mys. Shop., Cust. Exit Interview	Quar-terly	Mgr. Retail Wkfrc. Strat.	Improv. Effort	**RUPI** = **R**etail **U**nit **P**roficiency **I**ndex

Rev #	Date	Revision Description	By	Appr.
	5/10/00	First Draft	RS	Team
3	6/29/00	Revise P1	JKS	Team
4	7/13/00	change orient. in misc. column	JKS	Team
5	8/08/00	-change Action Plan 1 box	JKS	Team

Action Planning

This part of administration contains a blank action plan template and a completed Action Plan 1. This is a tool for documenting and monitoring a set of deliverables to completion.

The first focus is on the 'what' column as it is where to list out all of the items to be accomplished.

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.

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

What needs to be done	**How** to do the "what"	**Who** is doing the "what"	**Time** how much time for the "what"	**Measure** what is going to confirm the "what" got done

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).

The columns marked what are performed in sequential order, if possible.

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 to effectively rollout the program.

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

District Coordinator Action Plan (1)

What	**How**	**Who**	**Time**	**Measure**
needs to be done	to do the "what"	is doing the "what"	how much time for the "what"	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)
8. Other activities at your discretion (ie., Mgmt. Briefings)	*	*	*	*
* Local Decision				

Retail Sales Skills Process

Through the years many evolutions have occurred in our retail area. We have instituted GIST and have had numerous revenue generation campaigns. We have instituted the key questions and the Mystery Shopper program. What better way to incorporate all of these elements into the retail transaction than through the use of a structured documented process?

What better way to insure the ability to offer consistent, efficient, professional transactions at every location, everyday, by every retail clerk than 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 Retail Clerks so they understand WHY it is important to greet properly and ask the key questions. Therefore, the process should be presented to insure comprehension of the steps and explain why we are standardizing the transaction, step by step.

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. The business gains assurance of meeting customer need(s) while also generating maximum possible revenue. Our employees will gain a high level of confidence in meeting the customer needs with professional, courteous, and highly knowledgeable interaction at the retail counter.

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

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

Step 1- ***Customer is at the retail outlet for service. This is starting point for the retail transaction.***

Step 2- Retail clerks greet customers pleasantly

So why is it important to always greet customers pleasantly?

____
____
____

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?

This a critical step where the retail clerk needs to gain full understanding as to what the customer needs. The key factor is whether the customer has 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, or wants to pick up hold mail, etc. then move through step 4A (left box) and proceed down to step 9, or the S of GIST box.

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. When a customer presents a package, the clerk should complete a visual inspection of the item and follow hazardous mail acceptance procedures. This is a Federal Aviation Administration 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?

Customers are sometimes confused about the mail classes we offer. Our mail classes are distinguished one from another by such things as price and time of delivery. Asking this key question rapidly gets us to the point. Receiving the customer response to this question positions 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 the appropriate class 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 one 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?

Step 8 - Customer selects mailing option, clerk offers special services

Once the mail class has been appropriately selected, the additional options are made 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 insured. One of the following questions would assist with that: "Do you need insurance?" or, "How much insurance do you need?" The process calls for all appropriate special services for the mail class of choice to be offered.

The next step converges both the "item to mail" and the "non item to be mailed" tracks of the process. There is one set of steps left for the entire balance of the process.

Step 9- Retail clerks suggests one additional item

Remaining 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 three parcels a day in all of our retail outlets.

Step 10- Retail clerk offers payment options

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

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 alternate "mail service stores" have sprung up for a reason. When our customers leave our retail units satisfied, we have gained the greatest assurance that WE WILL SEE THEM AGAIN!

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

Retail Sales Skills Transaction Process Role Play #1

Task: Customer with item to mail

_______1Sales 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 anything 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. It 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:

Process 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 was reviewed in module 1-part 2; the notes here will simply emphasize some of the unique characteristics that the process management system offers.

The narratives in part 2 of this module are applicable to like activity boxes in the process chart of part 3.

The vertical configuration of the process chart clearly distinguishes activities and tells who is responsible for their execution.

The process chart has seven process measures, all of which correspond to specific questions in the Mystery Shopper survey. This allows for integration and monitoring of the process against the Mystery Shopper program and the tracking of success.

The process chart has one result measure that is already systemic and allows for the ongoing tracking of success of the entire output of this standardized retail transaction process.

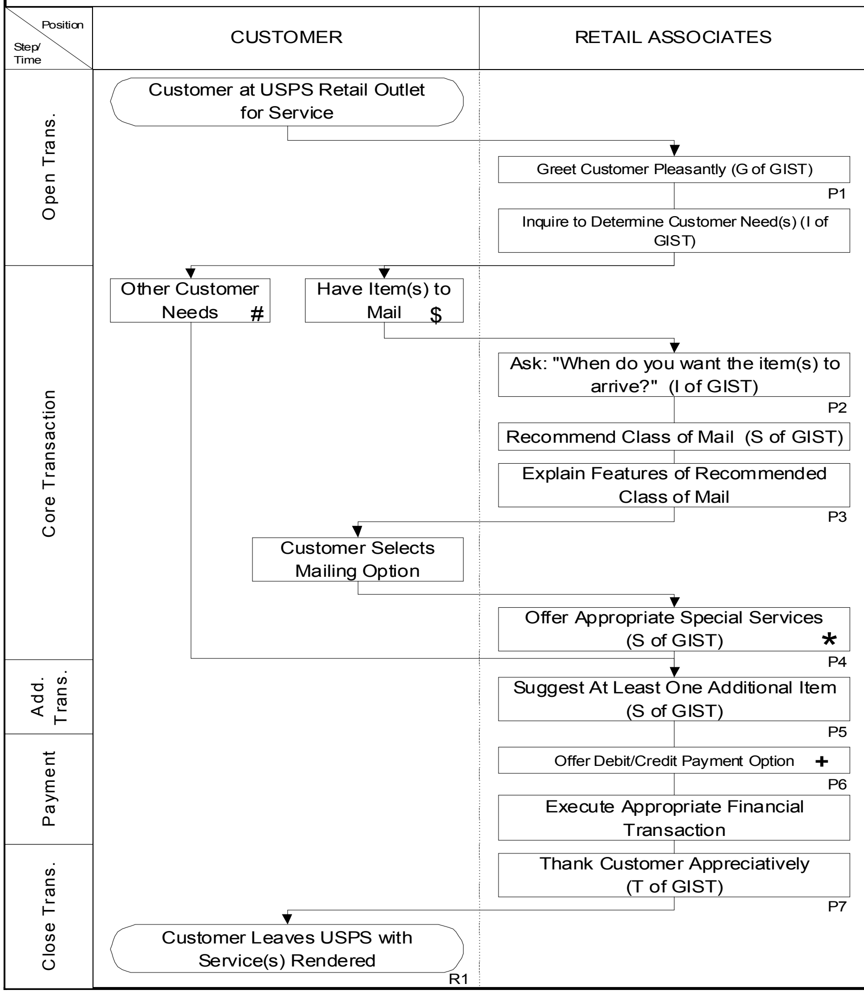
Both sets of measures (P's & R) allow for the entire process to be managed. Thus, we truly realize usage of a process management system.

The process chart's miscellaneous column allows for an extensive array of information. This information can 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 five 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; Lois Murphy 636 733-5132	QUALITY CONTACT: John K. Schwarz; PHONE NUMBER: 202 268-7721; 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

Process Flowchart



Process and/or Results Indicators: Process Control Charts / Outcome Results Indicator Charts	Checking: Control Limits / Specs/ Targets	Checking: Checking Item / What to check	Checking: Frequency / When to check	Checking: Responsibility / Who checks	Checking: Contingency Plan / Action Req'd for Exception	Misc. Information: Include: Abbreviations - Procedures - Remarks,etc.
P1=Mystery Shopper (? 14) Score	100%	Mystery Shopper	Quarterly	Hdqtrs. Retail Opns.	TBD	**G.I.S.T.= G**reet, **I**nquire, **S**uggest(s), **T**hank
P2=Mystery Shopper (? 5) Score	100%	Mystery Shopper	Quarterly	Hdqtrs. Retail Opns.	TBD	# = I.E. Passports, Meter Setting, Stamps, Info., Etc.
P3=Mystery Shopper (? 8) Score	100%	Mystery Shopper	Quarterly	Hdqtrs. Retail Opns.	TBD	* = Delivery Confirmation, Certified, Registered, Return Receipt, Insurance, Merchandise Return Receipt, Restricted Delivery, C.O.D., Certificate of Mailing
P4=Mystery Shopper (? 9) Score	100%	Mystery Shopper	Quarterly	Hdqtrs. Retail Opns.	TBD	
P5=Mystery Shopper (? 11) Score	100%	Mystery Shopper	Quarterly	Hdqtrs. Retail Opns.	TBD	
P6=Mystery Shopper (? 13) Score	100%	Mystery Shopper	Quarterly	Hdqtrs. Retail Opns.	TBD	+ = Debit / Credit Cards, Cash, Check(s), Money Orders, Liberty Cash Cards (where appropriate)
P7=Mystery Shopper (? 19) Score	100%	Mystery Shopper	Quarterly	Hdqtrs. Retail Opns.	TBD	
R1=Mystery Shopper Sales Skills & Product Knowledge District score	Upward Trend TBD	Mystery Shopper	Quarterly	Hdqtrs. Retail Opns.	Improv. Effort	$=When accepting a parcel, refer to HAZARDOUS MAIL acceptance procedures

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 footnote	JKS	Team
3	7/27/00	title change to Retail Associates	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 Supervisor Retail Sales Skills process chart and the Sales Skills matrix.

Action Plan 2 has previously been referred to in the Supervisor Retail Sales Skills Matrix and the Supervisor 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, manager, or supervisor to complete the sales skills rollout. This action plan must be introduced to all participants with a thorough explanation of each item so that there is total understanding of what responsibilities that individual has 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 allows for supplementing the five items if a District feels there are more items they need to accomplish in meeting their 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)

What	**How**	**Who**	**Time**	**Measure**
needs to be done	to do the "what"	is doing the "what"	how much time for the "what"	what is going to confirm the "what" got done
1. Orient/set expectations for execution of standard retail transaction process	Preferrably, one-on-ones	Management	NTE 11/20/00	Documentation of all responsible Associates 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** peformance problems addressed via National/local Agreement procedures. Look for **other recognition** opportunities.	Management	Ongoing	Local VOE Indicators
6. Other Activities (list):	*	*	*	*
* Local Decision				

Instruction for Giving the Retail Transaction Talk, Course # 41201-02

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

Review with each retail clerk the retail sales skills process on the next page. Explain each step of the process, give examples and explain. The talking points that follow will 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: Two role-play scenarios were developed using the Sales and Services Associate Training Course structured on the job format.

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.

RETAIL SALES SKILLS PROCESS

[8/08/2000]

The following pages contain all information needed to provide the Retail Sales Transaction Talk.

STANDARD RETAIL TRANSACTION –Talking Points

Step 1- The typical and logical starting point for the transaction.

Notes:____
____
____
____

Step 2- Demonstrate some form of positive and friendly greeting to each customer. For example:

Good morning or afternoon.

Call customer by name if known.

Why- Pleasant greetings are important to customers. Surveys reveal that customers are more forgiving for long waits, etc. if greeted pleasantly.

Notes:____
____
____
____

Step 3- A critical step where the retail clerk needs to gain full understanding as to what the customer needs. To set up the next step, the clerk determines whether it is an item to mail, or something else.

Why- Most customers don't know our full range of products and services, and they shouldn't be expected to know. It is the clerk's job to ask the right questions that will help them understand what the customer really needs.

Notes:____
____
____
____

Step 4A- This is for a customer WITHOUT AN ITEM TO MAIL. Other needs are dealt with at this point, for example, a customer who is picking up mail or purchasing a money order.

Notes:____
____
____
____

Step 4B- This is for the customer who HAS A SPECIFIC ITEM TO MAIL. If a package, do a visual inspection and follow HAZARDOUS MATERIALS procedures. Appropriate questions might be to ask; "Are the contents perishable or fragile, or contain anything potentially hazardous?" or "Does the package contain anything potentially hazardous?"

Why - This is a FAA requirement that is regulated by the Department of Transportation.

Notes:

Step 5- The associate should ask "When do you want it to arrive?" or "How soon do you want it to get there?"

Why - This sets up the ability to make the right recommendation for the class of mail.

Notes:

Step 6- The associate should offer appropriate classes, which would fit the customer's expectation of when they want it to get there. For example, Express Mail or Priority mail service, if speed is desired.

Why - This gives the customer options for them to make a selection based on their needs and what they're willing to pay.

Notes:

Step 7- The associate should explain features and benefits of the recommended classes of mail. For example, Express Mail premium service offers overnight guaranteed service, while Priority would be in the 2 to 3 day range without a guarantee.

Why - This step helps insure that the associate and customer have agreed on the right choice.

Notes:

Step 8- Following along with ITEM TO BE MAILED and the choice of class of mail, any additional special services available with that class of mail should be offered. For example, Delivery Confirmation, Certified, or Return Receipt, depending upon the particular class of mail chosen. With regard to the insurance option, a recommended question might be, "How much insurance do you need?"

Why - This question or another kind of inquiry can clear up customers possible misconception that we always offer automatic insurance or that an item has to be of a certain value to be insured. Be mindful of the nominal fee for insurance.

Notes:____
____
____
____

Step 9- The two tracks of the process now converge at step 9.

Why- because we have revenue generation possibilities for both at this step by offering at least one additional item. For example: offer current/popular commemoratives, phone cards, extra stamp booklets, etc.

Notes:____
____
____
____

Step 10- Not all of our customers know we accept debit/credit cards for payment. Where available, Liberty Cash Cards are also a potential method of payment. For example, might be; ask the question, "Would that be cash or charge" or "Would you like to pay with a debit/credit card?" or if customer presents cash for purchase educate customer by asking, "Are you aware that we accept debit/credit cards for payment?" If a customer is paying with on-line Debit Card (where a pin # is required) always offer cash back, as an option.

Why - It may be convenient for the customer, and it costs less to process for the Postal Service

Notes:____
____
____
____

Step 11- The retail clerk must offer correct change, process debit/credit/Liberty Cash accurately and secure all funds.

Why - This maintains business, clerk and customer integrity.

Notes:____
____
____
____

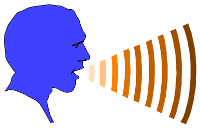
Steps 12A/B- This is where we professionally thank and otherwise closeout the transaction by saying "Thank You for your business today," or "It has been our pleasure to serve you today!"

Why - Customers are why we exist. We want them to leave our retail outlets pleased with the services rendered. In recent research when customers were asked what is the one thing the Postal Service can do for you, the overwhelming response was "appreciate my business."

Notes:____
____
____
____

The Toolkit
Information for Retail Personnel

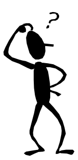
Retail Talk # 1
DATE: ____________, 2000



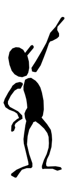
Let's Talk Retail

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 clerk's 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 clerk's own words providing the steps are not circumvented. For instance, a clerk might ask, *"How quickly do you want that to arrive?"*

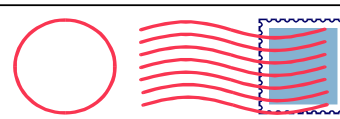


Question: **Is this just another use of Mystery Shopper?**



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 anything 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. Because it only weighs five pounds it doesn't cost any more to send it all the way across the country, than it would to send it across town."

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. It 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:

Process 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!"

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 additional resources 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

Importance of Product Knowledge

<u>Product Knowledge</u>

Product Knowledge is:

- Knowing our products/ services
- Having a willingness to share that knowledge
- Empowering 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 customers. As a manager, your own product knowledge establishes creditability to employees. Additionally, a good base of product knowledge allows for positive interaction between the retail clerk and customer, creating loyal, satisfied and returning customers.

<u>Product Knowledge is:</u>

- 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 Receipt_____	1.PS3811
B. Domestic Return Receipt_____	2.PS3811A
C. Request for Return Receipt After Mailing_____	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 L___________ C_________ C____________ is a prepaid stored value card used to purchase postal products and services.

11. D_____________ S______________ is the electronic money transfer from the U.S.A. to Mexico.

12. ________________ is the collecting and study of postage stamps and other postal materials.

13. _________ ___________ ____________ ______________ is the guaranteed two business day delivery to most locations in Western Europe countries and territories.

14. A special service that will provide easy to use access to delivery information at a low cost is D__________ C______________.

15. The electronic product that allows a customer to print on an envelope or mailing label is ___________ _______________ postage.

16. Only Priority Mail and Parcel Post pieces that weigh less than ________________ 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 _________ pounds, regardless of its actual weight.

One of the most misunderstood mailing options is Standard Mail (B) and the surcharges associated with it.

Does anyone know the definition of Standard Mail (B)?

Standard Mail (B) consists of:

Subclasses include:

Surcharge apply when:

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-130)

Domestic Mail Manual

Postal Bulletin

International Mail Manual

Notice 123-Ratefold

- ________________

  Contains current instructions and fast issuance of permanent directives to be place 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 for 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 38188-1001
- The Mailers Companion-(mcompani@email.usps.gov)

  Mailing address same as Memo to Mailers
- Philatelic Catalog (www.stampsonline.com) or 1-800-STAMP24

All items (unless noted) may be ordered from:
Material Distribution, Topeka KS 1-800-332-0317

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 Knowledge = power.

We give our customers power by sharing information with them and build the relationship that causes us to be their provider of choice.

Refer to the Domestic Mail Manual pages 1-8

Product Features and Benefits

Product	Features	Benefits	
Express	Fastest Service 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 $600 maximum * Delivery records held for 2 years

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			
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)			

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, when a customer chooses to go to a competitor it's a lost opportunity for the organization.

* 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 of 1 minute call***	**Type of card**
7 - 11	.029 cents per minutes	.69 cents	2 minutes	.77 cents	26 minutes	Surcharge
Exxon	.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
Barnes & 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

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?

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 exceed 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

State what you've ____________________
Wait for a ___________________________
Remind individual of the _______________
Ask for a specific ____________________
Agree ______________________________

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

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

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

SMART Goals

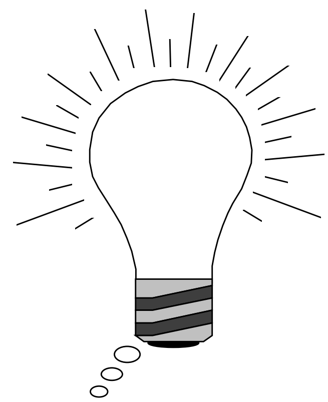
Specific

Measurable

Agreed To

Realistic

Timed



Three Areas to Evaluate Retail Clerks

Sales/Customer Relations

- **Greets customers when they approach counter**
- **Demonstrates product/service knowledge**
- **Suggests additional products/services**
- **Reinforces customers decisions and thanks them**

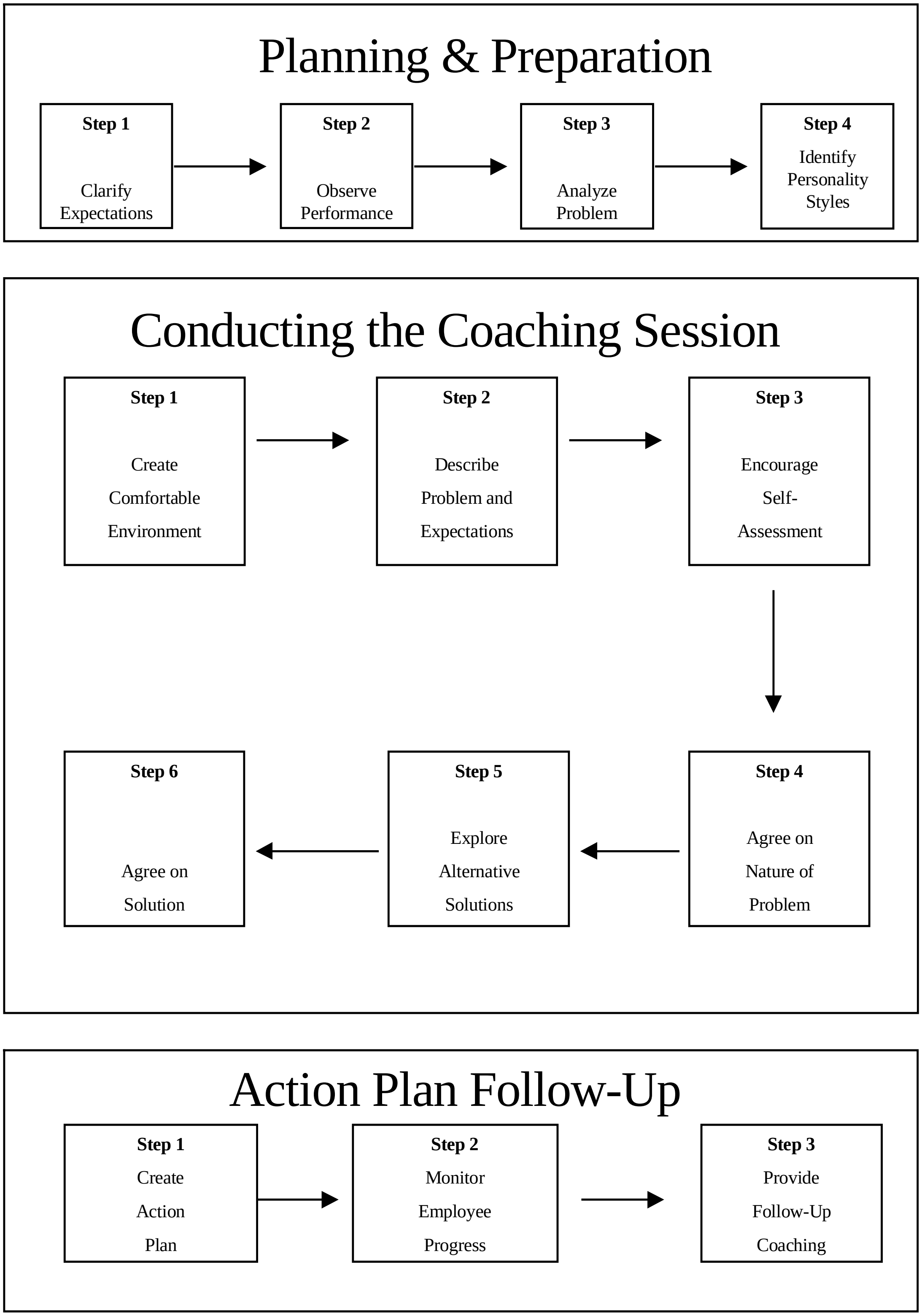
Operations

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

Compliance

- **Uniform/Appearance**

The Coaching Process



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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)

UNDERSTANDING PEFORMANCE – 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" evaluator's 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 reports are available to you within three business days.

You may have heard about the Malcolm Baldridge 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 completed the material required to apply for the Baldridge Award, although we are not eligible to compete for it as a government entity. We learned from the Baldridge Feedback Report that the Mystery Shopper program was considered a 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.

Two Mystery Shopper reports will tell you how your offices are 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. Result from these reports help you to 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 will assist you in getting the reports.

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 areas of sales skills and product knowledge. Use lobby observations and employee observations to further analyze performance measurement information.

As we discussed, Mystery Shopper is like a report card, and we do need to know how we are doing. Mystery Shopper Reports give us an indicator of potential revenue opportunities.

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

Refer to forms in the Toolkit

Lobby Observation Form
Employee Observation Form
Employee Observation Log

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.

<u>Pygmalion Effect: we tend to get the behaviors we ask for by our words and our actions.</u>

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 ob 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:

- **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.

Refer to instructions for Customer Interview Form from Toolkit

Refer to Customer Interview Form from Toolkit

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