



# **Sales Skills Toolkit**

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**Retail  
Retail Operations/Retail Workforce Strategies**

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# **Sales Skills Toolkit**

United States Postal Service  
Retail  
Retail Operations/Retail Workforce Strategies  
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Washington, DC 20260-2442

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

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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.

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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.

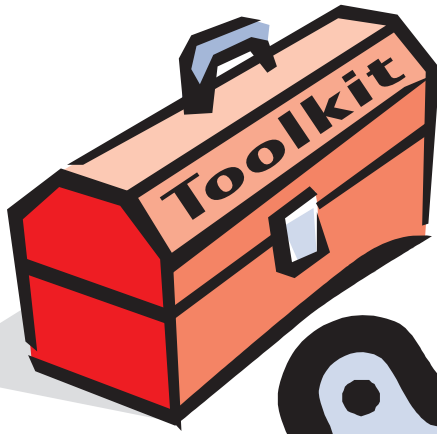


# Sales Skills Toolkit



# Table of Contents

<b>I. Introduction / Mission</b>	<b>3</b>
<b>II. Coaching</b>	<b>6</b>
■ What is Coaching?	6
■ Employee Evaluations	7
■ Feedback	8
<b>III. Communication</b>	<b>10</b>
■ Sales Skills Retail Talks	10
■ Retail Talk Log	11
<b>IV. Implementation of Sales Skills Strategies &amp; Tools</b>	<b>26</b>
■ Employee Observation Form & Log	26
■ Lobby Observation	29
■ Customer Interview Form	31
■ Retail Performance Report	33
■ Activity Checklist	34
<b>V. Resources</b>	<b>36</b>
■ Mystery Shopper – GIST Letter	36
■ “Options” Booklet	39
■ Best Practices	44
■ MS Survey	49
■ Process Management System Information	50



# Introduction/Mission

## I. Introduction / Mission

### II. Coaching

- What is Coaching?
- Employee Evaluations
- Feedback

### III. Communication

- Sales Skills Retail Talks
- Retail Talk Log

### IV. Implementation of Sales Skills Strategies & Tools

- Employee Observation Form & Log
- Lobby Observation
- Customer Interview Form
- Retail Performance Report
- Activity Checklist

### V. Resources

- Mystery Shopper – GIST Letter
- “Options” Booklet
- Best Practices
- MS Survey
- Process Management System Information



# Introduction

The Postal Service has 100,000 retail employees serving more than seven million customers every business day at 38,000 retail locations. That means we have over seven million opportunities daily to establish the Postal Service as the premier provider of our customers' mailing needs. One dollar of each four, or \$15.4 billion annually, generated by the Postal Service is retail revenue.

The retail arena has historically been treated as a secondary unit to the primary objective of moving the mail. Retail Operations presents an opportunity to directly impact the "face" of the Postal Service.

## SALES SKILLS

### WHY USE SALES SKILLS?

Postmasters, supervisors and managers have a multitude of duties to perform which they constantly strive to prioritize. The time spent ensuring sales skills are being learned and utilized by retail personnel will reap benefits in the targeted areas of customer satisfaction and revenue generation.

The "sales skills habit" requires a combination of knowledge of the products, ability to interact with customers and desire to do the job, along with follow-up by the supervisor/manager. This book contains the necessary tools to assist you in successfully developing the sales skills habit among your employees.

Proper use of sales skills at your office **can** make the difference in whether your office achieves its revenue goals and customer satisfaction targets.

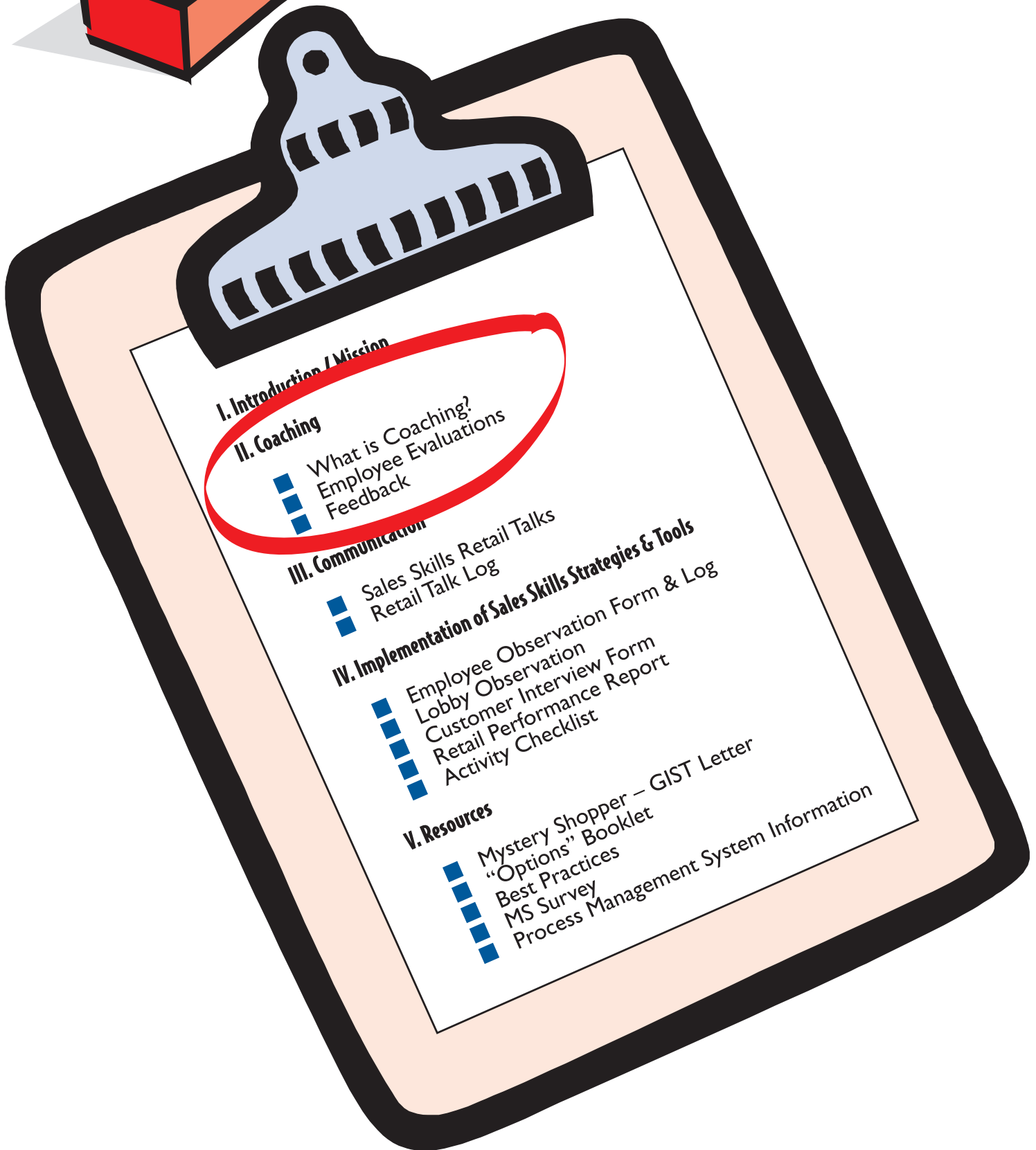
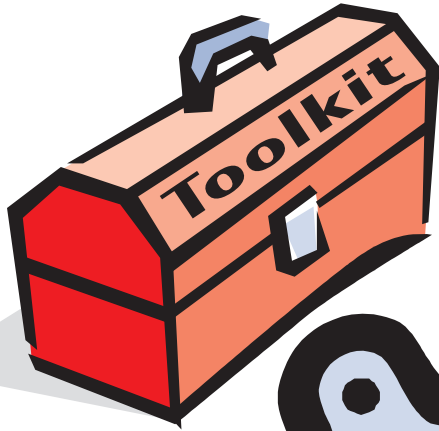
# Our Sales Skills Mission

We will identify and provide the customer with the **right product** and the **right service** at the **right time**.

We will promote the effective use of sales skills by our retail clerks and seek the commitment from all managers involved in the retail process to support the Postal Service's goal to be the premier provider of the 21<sup>st</sup> Century. We will place emphasis on fulfilling our customers' needs by focusing on asking the sales skills questions and providing appropriate coaching. This will result in:

- **A more customer-oriented Postal Service**
- **Increased customer satisfaction**
- **Increased customer loyalty**
- **Increased interaction between retail clerks and customers**
- **Customers who are knowledgeable of our products and services**
- **Increased retail revenue**

# Coaching



## I. Introduction / Mission

## II. Coaching

- What is Coaching?
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# Coaching

Sales Skills Coaching is a motivational discussion between management and retail clerks aimed at enhancing the employees' product knowledge and ability to successfully apply the sales skills they have learned.

## **COACHING WILL HELP EMPLOYEES:**

1. Improve in a specific area of his/her job.
2. Enhance or extend a valuable skill in a new way.

As the supervisor, you are the coach. You are a closely scrutinized role model and employees take their service cues from you. The way you treat (or just talk about) customers in view and/or earshot of your employees has a profound effect on how they perform, how they view their jobs and the organization, and the effort they will put forth to serve customers.

## **COACHING IS THE ABILITY TO:**

- Instill Fundamentals - Keep your employees focused on the task at hand. Improve employees' skills/performance.
- Build Teamwork – Keep employees focused on their performance and the overall success of the group (retail). Let them know how their job may effect another's. Keep employees working together in harmony.
- Evaluate and Adjust – Have a game plan (initiate goals). Learn how to evaluate performance and make necessary changes.
- Reinforce and Motivate – Correct problems timely and praise good efforts. Your words and actions set the tone for their's.

# Employee Evaluations

Evaluations are only meaningful if employees know what they are required to do what level of performance is expected, and how they will be evaluated.

## HOW TO EVALUATE EMPLOYEES:

1. Set **"SMART"** goals – Goals that are:
  - **Specific**
  - **Measurable**
  - **Agreed To**
  - **Realistic**
  - **Timed**
2. Review unit level goals with employee
3. Inform the employee of your expectations
4. Get employee's commitment
5. Support employee efforts – seek their feedback
6. Monitor employee's performance and provide feedback
7. **Follow up**

## 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

# Feedback

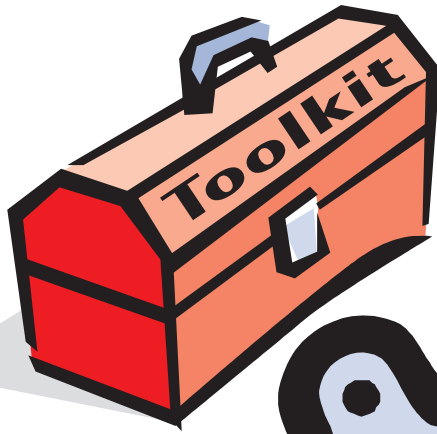
Feedback from evaluations is the most effective method of improving employees' skills. Effective managers use two types of feedback – Positive and Constructive. When providing positive feedback, you are letting your employees know they've done well in their jobs. When you provide constructive feedback, you let employees know they are not meeting expectations. The following are steps to use with employees when providing feedback:

## **STEPS FOR POSITIVE FEEDBACK:**

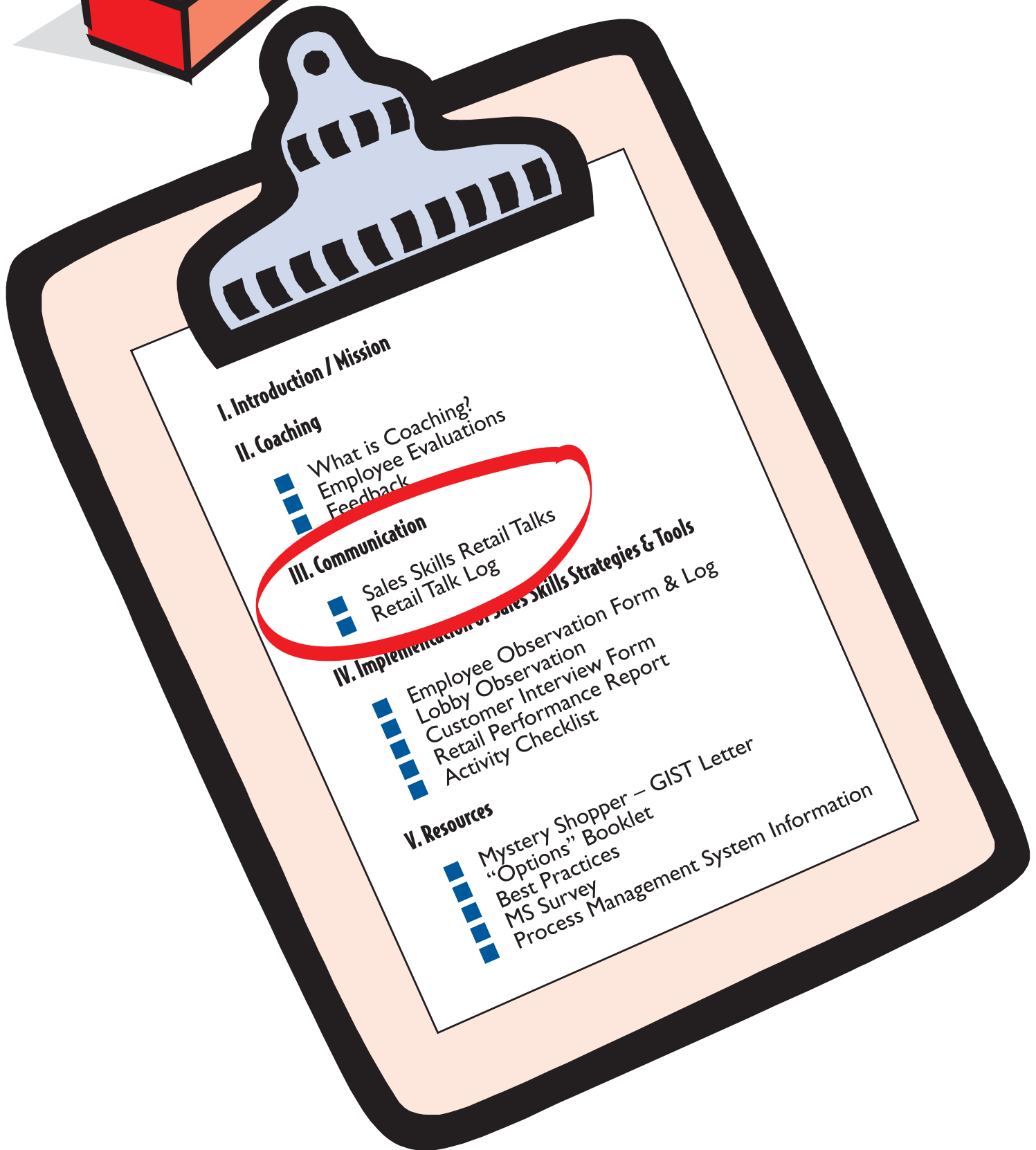
1. Be Timely – mention positive efforts as soon as they are recognized
2. Be Specific – provide details (who, what, when, etc)
3. Be Sincere – explain why you appreciate the employee's efforts
4. Know your employees – recognize good work in a way the employee can appreciate

## **STEPS FOR CONSTRUCTIVE FEEDBACK:**

1. Again, be timely, specific, and sincere
2. Explain what you would like to discuss and why it's important
3. Describe specifically the behavior YOU observed
4. Listen to the employee's concern about the situation
5. Provide the employee specific improvement suggestions
6. Sum up your conversation and show confidence in the employee's ability to improve
7. Make a written record of the discussion and the action plan for improvement



# Communication



# Retail Talks

## Instructions

The purpose of retail talks are to assist management in creating an interactive dialogue with retail clerks in the retail unit on a weekly basis.

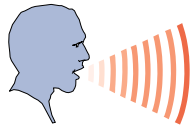
## Talks includes:

- product knowledge information
- sales skills tools
- optional section for local news

## Step by Step:

- Give the talks at a time of day when most retail clerks can participate.
- Encourage participation with clerks, asking them questions regarding the sales skills tools and the products or services.
- Use the optional section for local statistics such as local retail targets and how the unit is performing to those targets.





# Let's Talk Retail

## Priority Mail

- ❖ **What is Priority Mail?** Priority Mail is First-Class Mail that weighs no more than 70 pounds, provided priority rate postage is paid on that item. It can be ANY piece of First-Class Mail marked or labeled as Priority Mail, again with postage paid at the Priority Mail rate.
- ❖ **What about the cost?** It is an affordable service for those simply looking for a low-cost alternative for sending important correspondence. However, it is important to remember that PRICE is not necessarily the customers' objective. Priority Mail is highly visible and says to a recipient, "Open me First!" For example, a customer may elect to use Priority Mail to send a resume since it is likely to "impress" the recipient. As an added bonus, when a customer uses Priority Mail, they can purchase Delivery Confirmation and know for sure that their mail piece has arrived. Priority Mail can be sent to a post office box address whereas competitors' products cannot.



**Q**uestion:

Why should retail clerks **never** assume that everything goes by First-Class Mail?

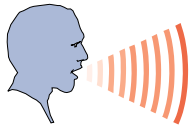


**A**nswer:

When we converse with our customers, we must listen carefully to them. We must be prepared to ask questions about their needs to understand what the customer is looking for. When a customer states they want to mail an item, it is like going to a restaurant stating, "I am hungry." Assuming that everything goes First-Class is like assuming everyone wants to eat the same thing. The more we know about our customers' **needs**, the better experience we can create for them.

## Local Notes





# Let's Talk Retail

## Delivery Confirmation

- ❖ **What is Delivery Confirmation?** A Special Service that enhances Priority Mail and Standard Mail (B). For a small charge, \$.35 for Priority and \$.60 for Standard (B), customers may confirm delivery of their mail piece.
- ❖ **How does it work?** Mailers have the option of choosing two ways of checking the status of their mail piece. They may dial 1-800-222-1811 or use the internet web site [www.usps.com](http://www.usps.com). Delivery Confirmation can be combined with other special services such as Insurance, COD, Special Handling, and Registered Mail.
- ❖ **What are the benefits to the customer?** Delivery Confirmation provides customers with proof that an item they mailed was delivered. This service blends competitive pricing and delivery information – an excellent bargain for the customer! It's easy to use and allows the customer to determine the date of delivery, attempted delivery or return. The stamped postmark on the receipt for Delivery Confirmation also provides proof of mailing.



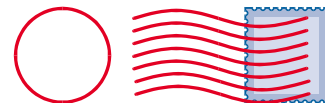
**Q**uestion: Why do we need to offer Special Services?

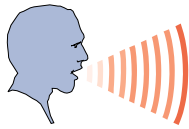


**A**nswer:

Customers may not know that we have Special Services available. Depending upon the Special Service purchased, customers may receive enhanced security and/or replacement costs (peace of mind); proof of mailing; proof of delivery; recipient's signature and date of delivery. Also, Special Services increase customer satisfaction and provide the Postal Service with additional revenue.

## Local Notes





# Let's Talk Retail

## Insurance

- ❖ **What mail can be insured?** Insurance may be purchased for Priority Mail, First-Class Mail and Standard Mail (B).
- ❖ **How much does it cost and what does it cover?** Insurance may be purchased for as little as 85 cents. Coverage is available for up to \$5,000. For items requiring more than \$5,000 in coverage, registered mail service should be used. Items should only be insured for actual value. Customers are required to provide proof of the value of an item.
- ❖ **What are the benefits to the customer?** A major benefit to the customer is peace of mind. While the Postal Service makes every effort to deliver all mail properly and safely, rare instances do occur where an item may be damaged or lost. The amount of insurance coverage for loss will be the actual value, less depreciation. Customers can receive an immediate refund for items valued up to \$50 with proof of value and their insurance receipt form PS 3813.



**Q**uestion:

Why should we offer our customers value-added services?

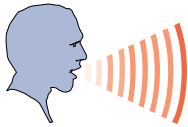


**A**nswer:

Value-added services enhance the level of quality to our core product line. When we offer our customers Insurance, Certified, Registered, Return Receipt, Delivery Confirmation and Certificate of Mailing, we are anticipating and responding to their needs. Many customers are not aware that these "Special Services" are available. Some think insurance is automatically included in the price when mailing a parcel. Selling two or more services simultaneously is an efficient and effective way to increase customer awareness of the services available to them. Finally, value-added services increase the profitability of our product lines and that's good for us.

## Local Notes





# Let's Talk Retail

## Express Mail

- ❖ **What is Express Mail?** Express Mail is our premier expedited service for mail pieces that need to get there fast. It is our fastest service with no extra charge for weekend or holiday delivery. Express Mail service is guaranteed for one or two-day delivery depending on destination.
- ❖ **Other than speed, what are the benefits of Express Mail service?** A customer's receipt at the time of mailing serves as proof of mailing. Also, tracking of the mail piece is available by calling 1-800-222-1811 or visiting our web site at [www.usps.com](http://www.usps.com). Express Mail pieces have \$500 insurance automatically included and additional insurance coverage up to \$5,000 may be purchased – some restrictions apply. Document reconstruction insurance can be purchased. And consider this: Delivery of a card or gift via Express Mail can really make someone feel special! All that AND labels, envelopes, boxes and forwarding service are free with Express Mail Service!



**Q**uestion:

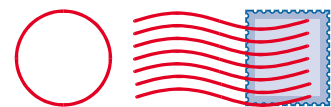
*Why should we ask our customers if they want to put their purchase on a debit or credit card?*

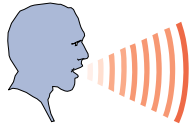


**A**nswer:

Our mystery shop statistics show that 65% of our customers are not informed that we offer this service. Credit and debit cards offer a convenient, easy way to make purchases while allowing the customer to hold on to their cash. Also, customers can get "cash back" up to \$50.00 when using a debit card. Debit and credit card transactions are less costly to process than cash transactions. Customers tend to purchase more when using a debit or credit card (possibly saving a trip to the Post Office). When customers use debit and credit cards, retail clerks have less cash to count at day's end, make fewer errors and can usually close-out faster.

## Local Notes





# Let's Talk Retail

## Certified Mail

- ❖ **What is Certified Mail?** Certified mail requires the person receiving your mail piece to sign a delivery receipt and provides you with proof of mailing.
- ❖ **Is it expensive and why use it?** At \$1.40 plus postage, certified mail is a bargain when you require proof of mailing. Examples of when to use certified mail are: Income tax returns; contracts; insurance premiums; college applications; mortgage payments; and date-sensitive mail matter.
- ❖ **What other services may be combined with Certified Mail?** Customers may choose to purchase return receipt service for an additional \$1.25 at time of mailing. Restricted delivery service is available for an additional \$2.75. Certified mail may be sent either Priority or First-Class.



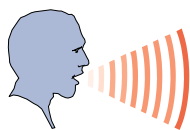
**Q**uestion: Why do we need to ask the customer the question, “*When do you want your item to arrive?*”



**A**nswer: A customer may assume that First-Class is all we have to offer. If so, when they need expedited service they will go elsewhere. Also, we allow customers a choice when we explain different options. Options enhance our image and present our retail clerks as knowledgeable professionals.

## Local Notes





# Let's Talk Retail

## Registered Mail

- ❖ **What is Registered Mail?** Registered Mail is the Postal Service's safest, most secure service for valuables. It is used to send high-value items such as deeds, family heirlooms, jewelry and stock certificates. Registered Mail was used to deliver the Hope Diamond and the first Moon Rocks.
- ❖ **How much does it cost and what other services can I get with it?** Registered Mail starts at \$6 plus postage. The stamped postmark on your receipt provides proof of mailing. For an additional charge you may purchase return receipt service, and Delivery Confirmation.
- ❖ **What about insurance?** Insurance coverage is automatically included in the Registered Mail fee, based on the actual value of the article being sent. Additional coverage up to \$25,000 on domestic shipments is available and coverage on international shipments vary, based on the destination.



**Q**uestion: Why do we need to offer Special Services?

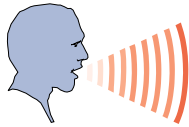


**A**nswer:

To educate our customers on our value-added services. Customers may not know that we have these services available. Depending upon the special service purchased, customers may receive enhanced security and/or replacement costs (peace of mind); proof of mailing; proof of delivery; recipient's signature and date of delivery. Also, special services increase customer satisfaction and provide the Postal Service with additional revenue.

## Local Notes





# Let's Talk Retail

## Return Receipts

- ❖ What is a return receipt? A return receipt provides the customer with proof of delivery. Return receipts can be used with a number of our services including: Certified Mail, Insured (numbered), Registered Mail, Express Mail, Merchandise Return Service, and COD.
- ❖ What does a return receipt provide the customer? A return receipt provides customers with the following:
  - Proof of delivery
  - Signature of addressee or agent
  - Date of delivery
  - Address delivered to
  - Record is kept on file at the delivery office for one year

*Important Note:* Be sure to tell your customer they may purchase a return receipt for \$1.25 at time of mailing. To receive a return receipt after mailing will cost customers \$7.00.



**Q**uestion: What is GIST and why should we use it?

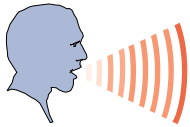


**A**nswer:

GIST means G (Greet); I (Inquire); S (Suggest) and T (Thank). Using GIST demonstrates our commitment to the customer and increases customer satisfaction. We should always GREET the customer pleasantly as soon as they reach the counter; INQUIRE when the item needs to arrive; SUGGEST a specific class of mail, merchandise, packaging products, stamps, etc.; and THANK the customer for their business.

## Local Notes





# Let's Talk Retail

## Postal Money Orders

- **What are Postal Money Orders and why use them?** Domestic Money Orders may be purchased at any post office and are the smart way to pay bills and send money anyplace in the USA. Money Orders are as good as cash and can be cashed at any bank as well as at any post office nationwide. If lost or stolen, the Money Order receipt guarantees its replacement.
- **What do we need to know about Postal Money Orders?** A Postal Money order (in amounts up to \$700) may be purchased for one low fee of 80 cents. There is a daily maximum purchase of \$10,000 and any amounts over \$3,000 will require additional customer information and customer photo ID prior to purchase. Some features ARE: (1) Customers can obtain a copy of a paid money order for \$2.75 for up to two years after the date it is paid, (2) postal money orders NEVER expire, and (3) postal money orders can be redeemed at over 38,000 locations nationwide.
- **How can we help protect the customer's money order?** Suggest the payee complete the name and sender's address immediately. Advise the customer to retain the receipt portion in a safe place. Money Orders cannot be guaranteed for replacement from loss or theft without the receipt.



### Question:

Why should a retail clerk ask a customer if they would like to use their debit card to purchase a money order if the customer is holding cash in their hand?



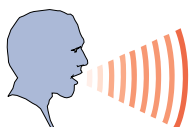
### Answer:

Sixty-five percent of our customers still do not know we accept debit cards. Since a customer cannot write a check for a money order, they may think they must bring cash – and many customers do not like carrying large sums of cash with them. Even if they have cash in hand for this transaction, they will appreciate knowing they have options in the future.

## Local Notes







# Let's Talk Retail

## Post Office Boxes

❖ **How does the rental of post office boxes benefit the Postal Service and/or the customer?** Some benefits of Post office box rental are:

- Convenience
- Early AM delivery
- Economically priced
- Security
- Privacy
- Some sites provide 24-hour availability
- Forwarding of mail for one year after box closed provided customer submits a Change of Address
- Reduces processing costs
- Increases revenue
- Reduces customer complaints about "late delivery"
- Business customers receive payments earlier in the day thus allowing earlier deposits of those payments



**Question:** How can a retail clerk assist a customer who is consistently complaining about "late" delivery of their mail?

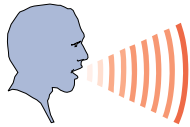


**Answer:**

A retail clerk can assist this customer by suggesting they rent a post office box. The clerk should explain that the customer will receive their mail earlier in the day. Business customers who receive checks from their customers will appreciate being able to receive and deposit the checks earlier in the day. The retail clerk will be contributing to customer satisfaction, revenue generation and, as a bonus, will not be met with an unhappy customer who feels they are receiving their mail too late in the day.

## Local Notes





# Let's Talk Retail

## You Don't KNOW Me

❖ **Why should we not “prejudge” our customers?** Often, retail employees, with the best intentions, tend to believe they KNOW what their customers want, need and can afford. They may hesitate to ask the sales skills questions based on an assumption that they already know the answers. However, we cannot be presumptuous enough to make choices for others. Don't judge someone by their appearance. For example: hairstyle, clothes, and age are not necessarily an indicator of a persons ability to purchase services. We should never assume our customers' priority concerns are money. Some customers may like to impress or surprise the recipient with Priority Mail or Express Mail Service. It is up to us to explain our products and services and let our customers make INFORMED choices. WE can make suggestions – but let's give them all their choices – not limited ones based on what we THINK they want or need.



**Q**uestion: Can you imagine ordering dinner at a restaurant without first looking at the menu?

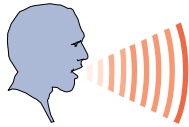


**A**nswer:

Most of us want to know what our CHOICES are before ordering at a restaurant. Cost is not always our concern. There is no way our server can know what we are in the mood for -- or what our diet or budget might allow. When you think about it from a personal angle, you can understand why it is so important that we let our customers know about our products and services and then let them “order” what THEY want.

## Local Notes





# Let's Talk Retail

## Packaging Products

❖ **Why should we sell packaging products?** Most customers find packaging an item a nuisance. The USPS has a varied selection of reasonably priced packaging products. These products are designed to meet the needs of our busy customers and they should be conveniently displayed. Products include bags, boxes, tubes, bubble wrap, tape, and mailing labels. This varied selection provides customers the opportunity for easy, fast packaging and shipping from the same location – we call it “one-stop shopping.” Clerks should encourage customers to purchase a little extra for their future mailing needs. This means they can get their package ready prior to visiting the post office and can get in and out of the post office even faster.

**And don't forget:** Our colorful padded bags make a great gift-wrap as well as a secure shipping vehicle; this coupled with a matching label is perfect for shipping gifts and many other items.



**Question:** How can we “tip” our customers?

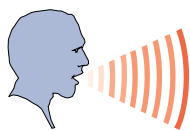


**Answer:**

You can't give them money but you can provide them valuable tips on “waiting in line” strategies. Inform them about vending machines, stamps by mail, phone, fax, etc., and urge them to purchase additional packaging supplies. If we teach our customers how to better use our products and services, we will improve customer satisfaction, increase revenue, earn customer loyalty and keep lobby traffic under control! Everybody wins with tips like these!

## Local Notes





# Let's Talk Retail

## Alternate Channels

- **When we talk about alternate channels in the postal environment what are we addressing?** Alternate channels are ways for customers to do business with us without coming to the Post Office.
  - ❖ Stamps By Mail
  - ❖ Stamps By Phone
  - ❖ Stamps By Fax
  - ❖ Stamps On Consignment
  - ❖ PC Postage
  - ❖ Contract Postal Units (CPUs)
  - ❖ Stamps by ATM
  - ❖ Self-service equipment
- **What advantages does the use of alternate channels offer the customer and the Postal Service?** Alternate channels can save the customer time by not standing in line in the lobby. In turn, shorter lines in the lobby allow the retail clerk a greater opportunity to serve those customers who are there for other services. Alternate channels allow customers to purchase stamps 24 hours a day, 365 days a year.



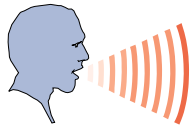
**Question:** How can a retail clerk help reduce customers' wait time in line?



**Answer:** Retail clerks can explain our alternate channels verbally and by giving the customer a Stamps by Phone catalog, or a Stamps by FAX brochure. They can also remind them of the availability of self-service equipment and encourage them to give it a try! By reducing wait time in line, clerks help improve customer satisfaction and make their own jobs a little more pleasant!

## Local Notes





# Let's Talk Retail

## Companion Selling

**What is companion selling and why should we do it?** Companion items are products and services that are sometimes used to compliment each other. If a customer asks you for change of address cards, you might ask the customer if they need phone cards to call friends from the “old neighborhood.” If a customer makes a “Hold Mail” request because they are taking a vacation trip, you might ask if they might like to purchase postcards, phone cards, stationery, and, of course, plenty of stamps for their trip. The Postal Service also has a product line with stamp images. Perhaps the image of their favorite stamp is on note cards, padded bags, stationery and address labels. Many people like to collect our phone cards with their favorite stamp images on them. By pointing out to customers that these companion items are available, you open a new door to their imagination. It is another way to educate customers about our products and allow them to make informed decisions about purchases. This results in customer satisfaction and, of course, increased revenue.



**Question:** Why should all retail clerks develop good customer interaction habits?



**Answer:** Serving customers in a professional manner should be a simple habit rather than a chore. We want to provide good service, good products and cultivate repeat business. One of the most important aspects of repeat business is providing customers with a pleasant experience. You know yourself how good it feels to have a positive experience when at a retail establishment. You enjoy the experience and most times return to do further business.

## Local Notes



# Retail Talk Log

Unit Name: \_\_\_\_\_ Supervisor's Name: \_\_\_\_\_

WEEKLY LOG													
Employee Name	Talk #												
	Talk #1	Talk #	Talk #	Talk #	Talk #	Talk #	Talk #	Talk #	Talk #	Talk #	Talk #	Talk #	Talk #
1													
2													
3													
4													
5													
6													
7													
8													
9													
10													
11													
12													

Weekly Log : Retail talk conducted weekly with each Clerk on Sales Skills and Product Knowledge information.  
Management & Clerk will record date and initial box.

Retain 2 years

# Implementation of Sales Skills Strategies & Tools



# Employee Observation Form

United States Postal Service

## 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.	
					1. Greet customer pleasantly.
					2. Ask "When do you want the item(s) to arrive?"
					3. Recommend class of mail and explain features and benefits.
					4. Offer any special services.
					5. Suggest an additional item to purchase.
					6. Inform the customer of the acceptance of debit/credit cards.
					7. Thank customer appreciatively.

Check marks show actions that were observed.

Note: items 2-4.

Only for letter or packages presented at time of mailing.

Observer's Comments

Observer's Signature

Observer's Title

Supervisor's Action Taken

Supervisor's Signature

Date

Employee's Signature

Date

PS Form 4000-B, September 2000 (Page 1 of 2) (DRAFT)

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

Original: Keep locally

Provide copies for: Employee & District Retail Manager



# 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/sales associate.

- 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 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.

# 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
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.

# Lobby Observation Form

United States Postal Service				FY	A/P	Date Observed
<b>Retail Lobby Observation</b>						
The <b>purpose</b> 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
<b>Operational Efficiency (1-3)</b>						
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.)					
<b>Sales/Skills/Product Knowledge (4-12)</b>						
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?					
<b>Courtesy and Professionalism (13-19)</b>						
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): _____					
18.	Did the employee pay attention to the customer during the entire transaction?					
19.	Did the employee(s) serving other customers appear to interact in a pleasant and courteous manner?					
<b>Retail Products and Services (20 - 21)</b>						
20.	Check the items that were NOT available in the lobby: <input type="checkbox"/> ZIP Code Books <input type="checkbox"/> Domestic Return Receipt <input type="checkbox"/> Certified Mail Forms <input type="checkbox"/> Priority Mail Envelopes <input type="checkbox"/> Insured Mail Forms <input type="checkbox"/> Express Mail Envelopes <input type="checkbox"/> Delivery Confirmation Labels <input type="checkbox"/> International Supplies <input type="checkbox"/> Other: _____					
21.	Were packing supplies displayed and professionally labeled?					
<b>Facility (22-25)</b>						
22.	Was the exterior (including doors, landscaping, etc.) clean and well maintained?					
23.	Was the interior (including counters, floors, walls, windows, ceiling) clean and well-maintained, and trash cans not overflowing?					
24.	Were all signs professionally lettered and properly posted?					
25.	Was the employee's counter clean and well-maintained?					
PS Form 4000-A, September 2000 (Page 1 of 2) (DRAFT2)						

# 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.

# Customer Interview Form

Customer Interview # 1		Yes	No	COMMENTS	Employee Coached?
<b>Retail Clerk:</b>					____ Yes/No
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?					
<b>Customer Interview # 2</b>		Yes	No	COMMENTS	Employee Coached?
<b>Retail Clerk:</b>					____ Yes/No
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?					
<b>Customer Interview # 3</b>		Yes	No	COMMENTS	Employee Coached?
<b>Retail Clerk:</b>					____ Yes/No
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?					
<b>Customer Interview # 4</b>		Yes	No	COMMENTS	Employee Coached?
<b>Retail Clerk:</b>					____ Yes/No
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?					
<b>Comments:</b>					
<b>Supervisor:</b>					
Date: ____ / ____ / ____		Unit Name: _____		Retain 2 years	

# 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 nametag
- 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

# Retail Performance Report

RETAIL PERFORMANCE REPORT									
A/P	Total Number of Lobby Observations Recommended	Total Lobby Observations Completed	Total Number of Employee Observations Recommended	Total Employee Observations Completed	Walk-in Revenue Actual \$	Walk-in Revenue SPLY \$	Total No. Customer Interviews Conducted	Total Number Retail Talks	*(MS) Sales Skills Score
1									
2									
3									
4									
5									
6									
7									
8									
9									
10									
11									
12									
13									
YTD									

\*Enter Mystery Shop (MS) Sales Skills score based upon your quarterly shops.

**District PROP Sales Skills Goal:**

**Unit Name:**

*This A/P report may be requested by your District.*

Recommended:

Lobby Observation - 1 per unit, each A/P

Employee Observation - 1 per clerk, each A/P

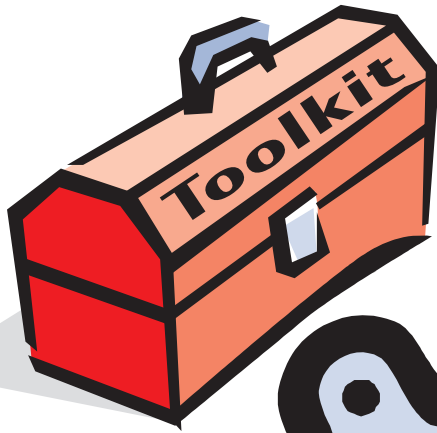
Customer Interview - 4 per unit, weekly

Retail Sales Talks - weekly

# Activity Checklist

ACTIVITY CHECKLIST											
Retail Sales Talks		Customer Interviews		Lobby Observations	Employee Observations	Retail Performance Report					
Week		Week		A/P	A/P	A/P					
1	27	1	27								
2	28	2	28								
3	29	3	29								
4	30	4	30								
5	31	5	31								
6	32	6	32								
7	33	7	33								
8	34	8	34								
9	35	9	35								
10	36	10	36								
11	37	11	37								
12	38	12	38								
13	39	13	39								
14	40	14	40								
15	41	15	41								
16	42	16	42								
17	43	17	43								
18	44	18	44								
19	45	19	45								
20	46	20	46								
21	47	21	47								
22	48	22	48								
23	49	23	49								
24	50	24	50								
25	51	25	51								
26	52	26	52								
				<b>RECOMMENDED:</b> Retail Sales Talks - 1 weekly Customer Interviews - 4, per unit, weekly Lobby Observation - 1 per unit, A/P Employee Observation - 1 per clerk, A/P Retail Performance Report - each A/P							
				Note: Enter date completed							
				Unit:							





# Resources

## I. Introduction / Mission

## II. Coaching

- What is Coaching?
- Employee Evaluations
- Feedback

## III. Communication

- Sales Skills Retail Talks
- Retail Talk Log

## IV. Implementation of Sales Skills Strategies & Tools

- Employee Observation Form & Log
- Lobby Observation
- Customer Interview Form
- Retail Performance Report
- Activity Checklist

## V. Resources

- Mystery Shopper – GIST Letter
- “Options” Booklet
- Best Practices
- MS Survey
- Process Management System Information

# Mystery Shopper – GIST Letter

RETAIL WORKFORCE STRATEGIES



January 14, 2000

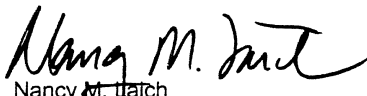
AREA RETAIL MANAGERS  
DISTRICT RETAIL MANAGERS

SUBJECT: Joint GIST Memo

Enclosed is a memo jointly signed by me and Cliff Guffey, the Clerk Craft director of the APWU. Cliff reports directly to Moe Biller. Cliff has expressed to me, repeatedly, his concerns about some of the negative perceptions clerks have about the Mystery Shopper program. We agreed that some clarification about expectations is in order.

We agreed that expecting clerks to follow a specific script, word for word, with every customer is not desirable, especially to customers. We are not trying to force our clerks to become robots. We also agreed with the principles established with the GIST program and that if clerks follow these principles with every customer, every time, they will also meet the expectations of the Mystery Shopper program. Clerks do need to understand, however, that asking a customer, "Can I help you?" does not satisfy the inquire part of GIST.

The APWU has already distributed this memo. It is also included in the course materials for the new Sales and Services Training program for new clerks. Please distribute this memo to existing clerks and supervisors as you see fit. Thank you.

  
Nancy M. Taich  
Manager

Enclosure

475 L'Enfant Plaza W SW Room 4352EB  
Washington DC 20260-2404  
202-268-5548  
Fax: 202-268-6087



October 7, 1999

**SUBJECT: MYSTERY SHOPPER - FOCUS ON GIST**

Our retail customers have more choices today than they've had in the past. They have choices among the products and services we offer and they have choices about who provides them. Making sure each customer leaves the retail counter satisfied with their purchase and experience is our focus.

There has been confusion in the past regarding Mystery Shopper Program and whether it establishes new requirements that are at opposition with GIST (Greet-Inquire-Suggest-Thank). The two programs support each other in our goal to improve the customer experience.

The Mystery Shopper Program provides information on our retail performance from a customer's perspective. All large retailers conduct some sort of mystery shop to help identify areas for improvement and ensure customer satisfaction.

What we require of employees when the customer is a mystery shopper is what is expected of them with every customer. It can be summarized within our GIST principles.

GIST Element

MYSTERY SHOPPER Element

**Greet**

Did the employee greet you pleasantly as soon as you reached the counter?

Did the employee smile and make eye contact?

**Inquire**

Did the employee ask how soon you wanted the item to get to its destination?

**Suggest**

Did the employee offer a specific class of mail?

Did the employee explain the features of the recommended class of mail?

Did the employee offer any special services?

– 2 –

Did the employee inform you that the USPS accepts credit and debit cards?

Did the employee suggest an additional item to purchase?

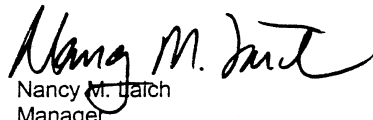
**Thank**

Did the employee thank you at the end of the transaction?

Clearly, when a customer comes in to purchase only a single stamp, the employee will not need to ask all questions listed above. However, if employees keep GIST principles in mind during every transaction, employees will ask appropriate questions during each transaction where it is applicable.

Any future changes to the mystery shopper question requirements will be consistent with GIST principles.

The Mystery Shopper represents the customer's experience at the time of the shop. GIST is a program that promotes improving the customer experience for every transaction. Mystery Shopper feedback can be a powerful tool for improving customer service as well as increasing revenue.



Nancy M. Hatch  
Manager  
Retail Workforce Strategies



C.J. "Cliff" Guffy  
Director, Clerk Division  
American Postal Workers  
Union, AFL-CIO

# Options Booklet



## The Questions:

Everything you wanted to know about  
why we ask the questions.

**OPTIONS!**  
**OPTIONS!**  
**OPTIONS!**

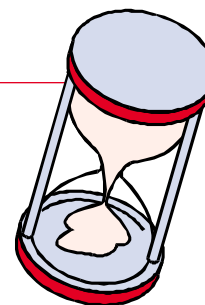
This publication has been designed so that all retail employees have a better understanding of why we use the five questions to guide customer transactions.

The Postal Service is in a constant state of change and this includes retail operations.

Our retail employees make contact with seven million customers each day. They must inform, educate and convince customers to use our services such as Delivery Confirmation, Priority Mail Global Guaranteed and Cash Back. **We are no longer order takers.**

This book is an excellent tool for retail "Coaches" to share with all retail employees. By implementing these strategies and making them a habit, you will be offering our customers the best possible service.

# When does it need to be there?



## ***The way we do business now:***

### **Scenario 1:**

The customer is given different prices and different delivery standards.

For example: Priority Mail will cost you \$X.XX and should be there in 2 to 3 days. Parcel Post will cost you \$X.XX and will take 7 to 10 days. In other words, do you want it fast or do you want it cheap?

## ***The way we should be doing business:***

### **Scenario 1:**

Ask your customer, "WHEN DOES IT NEED TO GET THERE?"

If you use postal terminology such as First-Class Mail, Parcel Post, and Priority Mail, you are confusing many of your customers. It is overwhelming and they do not understand what it is you are asking. Therefore, by keeping it simple, "When does it need to get there?" it is much easier for them to understand. Also, you will be saving time. Keep it to one simple question, "When does it need to get there?"

## ***The way we do business now:***

### **Scenario 2:**

Anything 13 ounces or less is regular First-Class Mail and no other options are offered to the customer. The assumptions are that First-Class and Priority Mail have the same delivery standard and the customer wants the cheapest price. The customer is given the price to mail it First-Class without being offered any other options.

## ***The way we should be doing business:***

### **Scenario 2:**

Ask your customer, "WHEN DOES IT NEED TO GET THERE?"

The first assumption that is being made is that First-Class and Priority Mail have the same delivery standards. That is not true. First-Class Mail may take 1 to 5 days and Priority Mail is 2 to 3 days.

The second assumption is that the customer wants the cheapest price. This also is not true. Customers want value, not necessarily the lowest price. We cannot make mailing decisions for them. Ask the question, "When does it need to get there?" and let your customer decide what is best for them.

Also, if you do not offer Priority Mail to your customer, they will not be able to purchase a service such as Delivery Confirmation.

It is important to let your customer decide how they want to mail their article. Do not assume that they want the cheapest price. Remember that customers want value, not necessarily the lowest price. They want to know their options.

# Do you need insurance?



## ***The way we do business now:***

### **Scenario 1:**

Customers are not being offered insurance.

### **Scenario 2:**

Customers are being discouraged from using the service because forms need to be completed.

## ***The way we do business now:***

### **Scenario 1 and 2:**

Ask your customers, **"DO YOU NEED INSURANCE?"** or **"IS THERE ANYTHING IN THIS PACKAGE THAT SHOULD BE INSURED?"**

**Why?** Are you aware that UPS automatically insures parcels up to \$100? Guess what? Our customers think that we do too, especially if they are mailing the package Priority Mail. Consumer Affairs receives many calls concerning this.

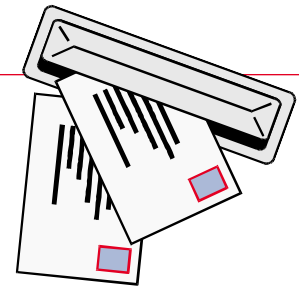
There are customers who think the article has to be valued at a certain dollar amount in order to qualify for insurance. By asking the question, "Do you need insurance?" you are informing the customer that there is no automatic insurance provided and they have the option of purchasing insurance.

How many retail clerks have been approached by a customer whose package did not arrive or arrived damaged and it was not insured? How many of those customers say, "Nobody told me it wasn't insured," or "Nobody offered me insurance?"

What can we do to prevent this? Simply ask, "Do you need insurance?"

Asking if the customer needs insurance does not take a lot of time. Just think of how time consuming it will be when the customer that you did not offer insurance to is standing in your lobby complaining that their package has been lost or damaged. You can spend additional time with the customer listening to them tell you what they think of our service when a valuable package didn't get there or arrived damaged. Doesn't it make more sense to ask the customer, "Do you need insurance?" at the time of mailing?

# Do you need proof of delivery



## ***The way we do business now:***

### **Scenario 1:**

The question is not being asked.

## ***The way we should be doing business:***

### **Scenario 1:**

Ask your customer, "DO YOU NEED PROOF OF DELIVERY?"

Many customers do not know about the services that the Postal Service offers. We need to educate them. If the question is not being asked, customers will not know proof of delivery is available to them.

## ***The way we do business now:***

### **Scenario 2:**

Clerks are asking if the customer would like a return receipt.

## ***The way we should be doing business:***

### **Scenario 2:**

Many customers do not know what a return receipt is. If you call it "proof of delivery" it is easily understood. Remember that our postal lingo confuses our customers.

If the customer answers yes to your question, "Do you need proof of delivery?" What are their options?

Articles containing merchandise:

1. If the customer does not want insurance, they can send their article Return Receipt for Merchandise.
2. If the customer wants insurance, remember that they have to insure the article for more than \$50 in order to purchase a return receipt, or
3. It can be sent Registered with a Return Receipt.

Articles not containing merchandise:

1. A letter or item containing just papers or documents can be Certified with a Return Receipt, or
2. It can be sent Registered with a Return Receipt.



## Will that be cash, credit, or debit?

### ***The way we do business now:***

#### **Scenario :**

The question is not being asked.

### ***The way we should be doing business:***

#### **Scenario :**

Ask your customer, "WILL THAT BE CASH, CREDIT, OR DEBIT?"

Do you remember when the Postal Service implemented the acceptance of debit and credit cards? It has been over three years, yet Mystery Shopper results tell us 65% of the general public still does not know we offer this service. That is a lot of people. It is posted on every post office window or door and on our IRTs. But customers do not read everything that is hanging on the walls or doors. This is why it is so important for you to let them know that they have payment options.

Simply ask the customer how they would like to pay for their transaction – cash, credit, or debit. If a customer has cash or a checkbook in their hand, let them know that we accept debit and credit cards. Try this, "Just to let you know, we do accept debit and credit cards." Or maybe, "For your next visit, we do accept debit and credit cards." It's simple and easy.

Did you know it is cheaper for the Postal Service to process a debit or credit card transaction than to process cash? The bank charges the Postal Service a fee for depositing cash and checks as well as for all debit and credit transactions. The fee for cash is greater than the fee for debit and credit. It also makes your closeout easier with less cash to count and fewer chances for mistakes.

**Thanks to the Southeast New England  
Performance Cluster for the original  
production of this "options" booklet**

# Resources / Best Practices

The resources listed below are divided into two sections. The first section includes strategies implemented at the unit level. The second section includes District wide strategies to assist the field in achieving their sales skills goals. For additional information contact District Retail Personnel.

## **UNIT RESOURCES:**

The Mid-America District utilized the Window Service Technicians (T-6s) to help drive sales skills. Each technician was provided "Sales Skills and Leadership Training". During this training, the technicians were provided clarification of their role (duties) as T-6s. They were also given tips on managing the window, i.e. lobby sweeps, clerk assignments, etc. In addition, the technicians conducted clerk observations and provided feedback. They attended quarterly meetings to discuss strategies on how to increase sales skills scores. The technicians held weekly sales skills meetings at their offices. Mid-America found that the offices that consistently held meetings scored significantly higher on Mystery Shopper than those offices that did not.

Additionally, Mid-America found that employee observations were very effective. Offices completing at least 70% of their observations increased their sales skills by 22%; those not completing them at this level only increased their scores by 9%. In fact, it is the conclusion of those supervisors using employee observations that it reaps the greatest benefits.

## **DISTRICT RESOURCES:**

Mystery Shopper Review Panel: Mid-America used this tool for improvement in the Mystery Shopper Process. The panel consisted of Retail Analyst, Retail Specialist and Manager Post Office Operations (MPOO). When an office scored below 75% on Mystery Shopper, the manager of that unit would meet with the panel. The manager was asked to be prepared to present an action plan for improvement. The office was then monitored for increased success in following mystery shops. If there was no improvement, the manager would meet again for further assistance.

Mid-America tracks consecutively missed questions by office. The data is provided to all offices and the responsible MPOO. This is an effective tool used to isolate each office's need for improvement. In addition, it affords the MPOOs the opportunity to monitor each office's performance.

# Resources / Best Practices

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Mid-America also has several positive recognition processes in place. For example: The District Hall of Fame, for offices achieving 100% for overall Mystery Shopper.

The results: Mid-America has experienced consistent improvement in their sales skills scores (from 32.6% to 41.4% to 56.4% to 85.5%).

The Dakotas District has a similar strategy. The managers of offices that perform below 70% are invited to meet with the District Manager and the leadership team. The team includes the Managers of Retail, Marketing, Operations Support, and Human Resources. The leadership's involvement is an integral part of the strategy. They provide support and direction regarding employee and operational issues.

The Managers or Postmasters that are required to meet with the District Manager's review panel must submit an action plan for improvement. Of course, if improvements are not obtained, the level of leadership involvement is increased. The Dakotas District often conducts these reviews via telecon.

The percent of improvement in these offices has a direct correlation to the involvement of the District Manager and staff. When the district leadership conducted the telecons, scores improved by 13.8% but, when they were not involved performance after the telecon actually dropped by 7.3%!

The results: Sales Skills improved from a low of 24.2% to the current score of 80.5%.

The Gateway District's Retail MPOO held weekly meetings with the managers. During these meetings, the Mystery Shopper scores and revenue performance were evaluated. In addition, the MPOO served as coach for the managers, assisting in the improvement process, while providing recognition for achievements.

The managers, in turn, held weekly sales meetings with their clerks. During these meetings, the manager coached clerks, discussed product drive periods, and shared results. The MPOO and managers provided positive recognition and dealt with poor performance.

The results: Sales Skills scores improved from 24.5% to 53.4% to the current 74.5%.

# Resources / Best Practices

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The success of the Mystery Shopper Program in the District of Maine is due to their "Can Do" attitude. Working closely with the MPOOs, the Manager of Retail uses a continuous communication stream to advise Postmasters of areas in need of attention in their offices. Communications are normally written, but follow up on action items is completed with a field visit conducted by the Retail Manager or the MPOO.

The District's focus on Sales Skills and Product Knowledge has keyed in on raising additional revenue, in lieu of reducing work hours. By asking the right questions to determine the best possible mailing solutions for their customers, the District of Maine has met their revenue plan for two consecutive years. The Retail Manager uses the Ten Commandments of Retail, a presentation he created, to teach Postmaster and retail employees the importance of asking the right questions. He also covers the importance of the total retail experience, through the eyes of the customer.

The results: In Quarter IV, FY 99, Maine's performance in the Sales Skills and Product Knowledge category led the Northeast Area with a 47.5% score! Since then, they achieved 34.9% in Quarter I, FY 00, and 59.4% in Quarter II, FY 00, - both scores led the Northeast Area. The improvement in this category helped them achieve an overall performance of 81% in Quarter III!

# Resources / Coaching

## **BOOKS**

- Anderson, K., Zemke R., (1997). *Coaching Knock Your Socks off Service*. AMACOM.
- Benton, DA., (1999). *Secrets of a CEO Coach: Your Personal Training Guide to Thinking like a Leader and Acting like a CEO*. Osborne/McGraw-Hill.
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- Dotlich, D., Cairo, P., (1999). *Action Coaching: How to Leverage Individual Performance for Company Success*. Jossey-Bass Inc., Publishers.
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- Hendricks, W. (1996). *Coaching, Mentoring, and Managing: Breakthrough Strategies to Solve Performance Problems*. Career Press, Inc.
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- Leonard, T. (1998). *The Portable Coach: 29 Sure-Fire Strategies for Business & Personal Success*. Simon & Schuster Trade.
- Peterson, D. (1996). *Leader as Coach*. Personnel Decisions International.
- Shula, D. (1996). *Everyone's a Coach*. Zondervan Publishing House.
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- Stowell, S. (1998). *Coach: Creating Partnerships for a Competitive Edge*. Center for Management \*( Organization Effectiveness.
- Thompson, J. (1993). *Positive Coaching*. Brown & Benchmark.
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- Witherspoon, R. and White, R., (1997). *Four Essential Ways That Coaching Can Help Executives*. Center for Creative Leadership.

# Resources / Coaching

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## **ACTIVITIES**

Whitaker, M., and Cartwright, A., (1997) *32 Activities for Coaching and Mentoring*. American Media Incorporated Publishing.

## **VIDEOS**

*FISH! Catch the Energy. Release the Potential.*(1998). ChartHouse International Learning Corporation.

*The Practical Coach.* ( 1997).Media Partners Corporation.

**Service Evaluation**  
**Second To None - Sample**  
**100 STN - Test Location**

Date 6/10/2000      Arrival 11:45 AM  
Day Saturday

Overall Score 92/100 - 92.00%

**Operational Efficiency**

1	How long was your wait in line? [minutes:seconds]	1:11	
2	Was your wait in line 5 minutes or less?	Yes	10/10
3	Did the vending machine appear to be in proper working order?	Yes	3/3
4	Were all vending machines fully stocked?	Yes	2/2
		Operational Efficiency	100.00% 15/15

**Sales Skills and Product Knowledge**

5	Did the employee inquire when you wanted the item to arrive?	Yes	11/11
6	Specify the class(es) of mail offered	Priority	
7	Did the employee offer the correct class of mail?	N/A	
8	Did the employee explain any features of the recommended class of mail?	Yes	8/8
9	Did the employee offer any special services?	Yes	8/8
10	Specify special service(s) offered	Return Receipt Certified	
11	Did the employee suggest an additional item to purchase?	Yes	6/6
12	Specify additional items offered	Stamps	
13	Did the employee inform you that the USPS accepts credit and debit cards?	Yes	4/4
		Sales Skills and Product Knowledge	100.00% 37/37

**Courtesy and Professionalism**

14	Did the employee greet you pleasantly as soon as you reached the counter?	Yes	4/4
15	Did the employee smile and make eye contact?	Yes	4/4
16	Did the employee present a clean, professional appearance?	Yes	4/4
17	Was the employee wearing the complete uniform?	No	0/3
18	If prior question is 'No', the employee was not wearing:	Top	
19	Did the employee thank you at the end of the transaction?	Yes	5/5
		Courtesy and Professionalism	85.00% 17/20

**Retail Products and Services**

20	Were the 3 forms or free supplies you were instructed to locate in the lobby available?	Yes	5/5
21	Which forms or free supplies were not available?	N/A	
22	Were retail packaging supplies displayed and professionally labeled?	No	0/5
23	If prior question is 'No', these problems were noted:	Handwritten sign/label	
		Retail Products and Services	50.00% 5/10

**Facility**

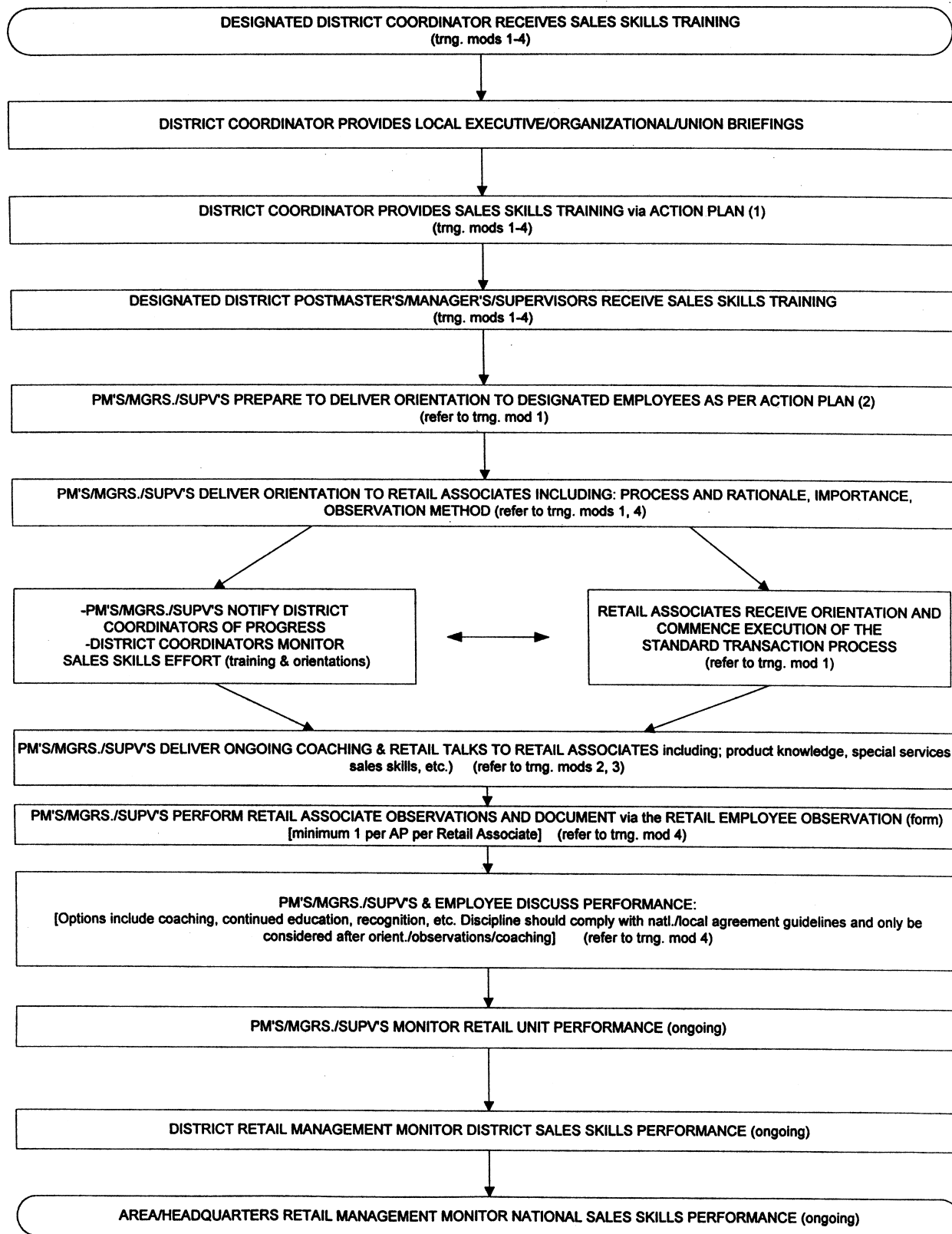
24	Was the exterior clean and well maintained?	Yes	4/4
25	Was the interior clean and well maintained?	Yes	4/4
26	Were all signs professionally lettered and properly posted	Yes	5/5
27	If prior question is 'No', these problems were noted:	N/A	
28	Was the employee's counter clean and well maintained?	Yes	5/5
29	Point of purchase signage displayed	Send Smart	
		Facility	100.00% 18/18

**Evaluation Information**

30	USPS Scenario ID	B4
31	Evaluator ID	2
32	Amount of sale from receipt	\$5.85
33	Revenue loss (based on scenario expectation)	\$0.00
34	Post Office information on receipt	
	00000 - Sample Location	
35	Evaluation Sequence:	FY00 Q4 - Shop 1

# SUPERVISOR RETAIL SALES SKILLS 'MATRIX'

7/27/2000

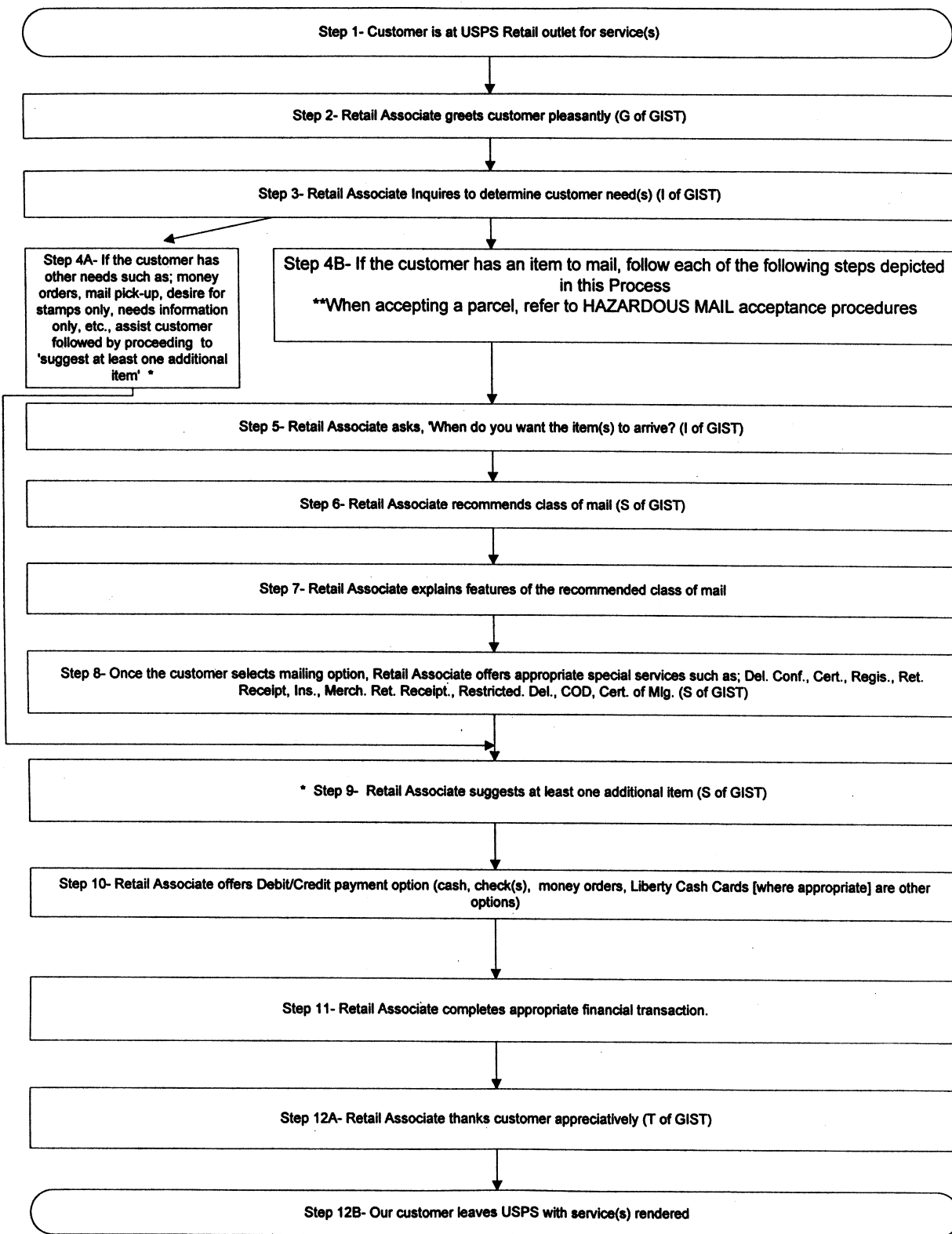




USPS PROCESS MANAGEMENT SYSTEM											
Process Description: Supv. Retail Sales Skills (2nd Level Macro)			Process Customer: Retail Personnel, USPS Retail Operations			Process Owner: Nancy Laich Lois Murphy			Quality Contact: John K. Schwarz Phone Number: 202 268-7721 File Name: siss.vad		
Customer Valid Requirements: Timely, Efficient Sales Skills Deployment			Outcome Results Indicator(s): 100% Timely and Efficient								
<p align="center"><b>Process Flowchart</b></p> <div> <div> <p><b>District</b></p> <p>Designated District Coord. receives Sales Skills trng./provides local executive/organizational/unit briefings</p> <p>Distr. Coord./Trainer provides 'Sales Skills' trng. via Action Plan 1</p> </div> <div> <p><b>Designated: Postmaster, Mgr. / Supv.</b></p> <p>Designated USPS PM / Mgr. / Supv. Receives 'Sales Skills' Trng.</p> <p>Prepare to deliver orient. to designated employees as per Action Plan (2)</p> <p>Deliver Orient. Inclusive of: -Message -Process -Evaluation</p> <p>Notify Distr. Coord. of Progress</p> </div> <div> <p><b>Retail Associates</b></p> <p>Receives Orient. / Understands / Document</p> <p>Execute Ongoing Standard Transaction Proc. (Retail Sales Skills Micro)</p> <p>Perform Retail Personnel + 'Observations' and Document</p> <p>Management / Employee Discuss Performance #</p> <p>PM / Mgr. / Supv. Monitors Retail Unit Performance (Ongoing)</p> </div> </div>											

## RETAIL SALES SKILLS PROCESS

[7/28/2000]



USPS PROCESS MANAGEMENT SYSTEM																								
Process Description: Retail Sales Skills (micro)			Process Owner: Nancy Laich Lois Murphy			202 268-5548 636 733-5132			QUALITY CONTACT: John K. Schwarz PHONE NUMBER: 202 268-7721 FILE NAME: rss.vsd															
Process Customer: USPS Retail Customers			Customer Valid Requirements: Courteous, Knowledgeable, Helpful Transactions			Outcome Results Indicator(s): 100% Courteous, Knowledgeable, Helpful Transactions			Misc.															
<div> <div> <div>Customer at USPS Retail Outlet for Service</div> <div>Other Customer Needs #</div> <div>Have Item(s) to Mail \$</div> <div>Ask: "When do you want the item(s) to arrive?" (I of GIST)</div> <div>Recommend Class of Mail (S of GIST)</div> <div>Explain Features of Recommended Class of Mail</div> <div>Customer Selects Mailing Option</div> </div> <div> <div>Greet Customer Pleasantly (G of GIST)</div> <div>Inquire to Determine Customer Need(s) (I of GIST)</div> </div> </div>										<div> <div>Customer</div> <div>Retail Associates</div> </div>			<div> <div>Process Flowchart</div> </div>			<div> <div>Process and/or Results Indicators</div> <div>Control Limits</div> <div>Special Targets</div> </div>			<div> <div>Checking</div> <div>Contingency Plan</div> <div>Action Req'd for Exception</div> </div>			<div> <div>Misc.</div> <div>Include: Abbreviations - Procedures - Remarks, etc.</div> <div>G.I.S.T.= Greet, Inquire, Suggest(s), Thank</div> <div># = I.E. Passports, Meter Selling, Stamps, Info, Etc</div> <div>* = Delivery Confirmation, Certified, Registered, Return Receipt, Insurance, Merchandise Return Receipt, Restricted Delivery, C.O.D., Certificate of Mailing</div> <div>+ = Debit / Credit Cards, Cash, Check(s), Money Orders, Library Cash Cards (where appropriate)</div> <div>\$=When accepting payment, refer to HAZARDOUS MAIL acceptance procedures</div> </div>		
Open Trans.																								
Core Transaction																								
Add. Trans.																								
Payment																								
Close Trans.																								