



# **Retail**

## **Structured On-the-Job Core Processes Training**

### **Workbook**

**Course #23Q01-06**

**NSN #7610040009881**

**January 2001**

RETAIL/WORKFORCE STRATEGIES  
ARLINGTON, VA

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United States Postal Service  
Retail/Workforce Strategies  
1725 N Lynn St  
Arlington, VA

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## **Use of Training Materials**

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## 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.

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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.

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## **PREFACE**

The Retail Structured On-the Job Core Processes were designed to provide Retail Coaches with a series of core lesson plans. Structured on-the-job training is used to acquaint employees with their new positions, to acquire knowledge and skills related to changes in work processes, and to implement refresher training.

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## Sample Script for Conducting Structured On-the-Job Training

1. Introduction. Hello, my name is \_\_\_\_\_. I am your RETAIL COACH.
2. The task we are going to work on today is [read from Training Worksheet]. By the end of this session, you will be able to [read from Terminal Objective]. The prerequisite for performing this task is that you have already taken the Sales and Service Associate Training Program. In addition, I'd like to review GIST with you before we begin. [Briefly, review Greet, Inquire, Suggest and Thank.]
3. For training purposes, review each step of the Training Worksheet by showing and telling the things listed under "Retail Coach will" and having the future associate repeat the demonstration by doing what is listed under "Future Associate will." Do this for all steps listed (up to 10 for each process).
4. For certification, either with the retail coach acting as customer or with an actual customer, have the future associate demonstrate the tasks listed. Check off the steps that were completed correctly by the future associate. If the future associate misses a step and a customer is present, remind him/her of the step and have him/her complete the task starting at the error. After the customer leaves, have the future associate go through the entire task and check off the steps that were completed correctly. If the future associate misses a step and a role-play is being used, have the future associate complete the entire task again. If the future associate misses the step twice, place an X next to the step.
5. At the end of the form, indicate the number of steps completed correctly by counting the number of check marks and placing the number in the space for completed steps. Indicate the number of steps either completed incorrectly or not completed by counting the number of Xs and placing the number in the space for steps not completed.
6. Indicate the number of steps that were completed successfully on the Structured Training Certification Worksheet and the PS Form 2528.
7. Make it a point during day one to show the future associate all necessary emergency exits, fire extinguisher placements and emergency numbers.
8. Make it a point during day one to show the future associate the break area and personal convenience areas.
9. Take time during the first 32 core processes to cordially introduce the future associate to the entire retail team which includes the manager of customer services, supervisor of customer services and the other sales and services associates, window clerks and sales associates.

**SALES AND SERVICES UNIT PROFILE - NAME OF RETAIL UNIT: \_\_\_\_\_****Person Completing Unit Profile: \_\_\_\_\_ Date Completed: \_\_\_\_\_****Mandatory Lesson Plans (Required for all Sales & Services Associates/Window Clerks)**

- |   |  |
|---|--|
| <input type="checkbox"/> 1. Selling and Accepting Domestic Express Mail   | <input type="checkbox"/> 16. Selling and Accepting Military Mail (APO or FPO)                      |
| <input type="checkbox"/> 2. Selling and Accepting Domestic Priority Mail  | <input type="checkbox"/> 17. Procedures for completing Custom Forms                                |
| <input type="checkbox"/> 3. Selling and Accepting Certified Mail  | <input type="checkbox"/> 18. Selling and Accepting International Insured Mail                      |
| <input type="checkbox"/> 4. Selling and Accepting Delivery Confirmation   | <input type="checkbox"/> 19. Selling and Accepting International Registered Mail                   |
| <input type="checkbox"/> 5. Selling and Accepting Domestic Numbered Insured Mail                                | <input type="checkbox"/> 20. Selling International Mail Return Receipt                             |
| <input type="checkbox"/> 6. Selling and Accepting Domestic Unnumbered Insured Mail                              | <input type="checkbox"/> 21. Retail Acceptance and Processing of Bank Cards                        |
| <input type="checkbox"/> 7. Selling and Accepting Domestic Registered Mail                                      | <input type="checkbox"/> 22. Procedures for Cashing Domestic Postal Money Orders                   |
| <input type="checkbox"/> 8. Selling and Accepting Domestic C.O.D. Mail  | <input type="checkbox"/> 23. Security and Accountability for Domestic Money Orders                 |
| <input type="checkbox"/> 9. Selling and Accepting Domestic Return Receipt for Merchandise                       | <input type="checkbox"/> 24. Procedures for renting a Post Office Box                              |
| <input type="checkbox"/> 10. Selling and Accepting Domestic Certificate of Mailing                              | <input type="checkbox"/> 25. Delivery of Registered Mail   |
| <input type="checkbox"/> 11. Selling and Accepting Domestic Return Receipt AFTER Mailing (Not Mail a Duplicate) | <input type="checkbox"/> 26. Delivery of Express Mail  |
| <input type="checkbox"/> 12. Accepting and identifying Domestic Machineable / Non Machineable Articles          | <input type="checkbox"/> 27. Delivery of Certified Mail  |
| <input type="checkbox"/> 13. Vacant   | <input type="checkbox"/> 28. Delivery of Postage Due or Business Reply Mail                        |
| <input type="checkbox"/> 14. Selling Domestic Postal Money Orders   | <input type="checkbox"/> 29. Delivery of Insured Mail  |
| <input type="checkbox"/> 15. Selling Stamps and Postal Retail Packaging Products                                | <input type="checkbox"/> 30. Delivery of Collect-On-Delivery (COD) Articles                        |
|   | <input type="checkbox"/> 31. Dispatching Registered Mail to the Processing and Distribution Center |
|   | <input type="checkbox"/> 32. Working With the Express Mail Network Directory                       |
| <input type="checkbox"/> 33. Selling and Accepting a Registered Mail COD. Article                               | <input type="checkbox"/> 61. Examining a Postage Meter   |
| <input type="checkbox"/> 34. Selling and Accepting an Express Mail COD. Article                                 | <input type="checkbox"/> 62. Exchanging Stamp Stock from a Customer                                |
| <input type="checkbox"/> 35. Procedures for Returning Express Mail  | <input type="checkbox"/> 63. CTT Scanning of Express Mail Delivery Labels                          |
| <input type="checkbox"/> 36. Selling and Accepting Express Mail Military Service                                | <input type="checkbox"/> 64. CTT Scanning of Incoming Express Mail in a Multi Zip or Hub Office    |
| <input type="checkbox"/> 37. Selling and Activating a Phone Card on the IRT                                     | <input type="checkbox"/> 65. Processing a PS Form 7381, Purchase of Supplies                       |
| <input type="checkbox"/> 38. Selling and Activating a Phone Card on IBM/NCR POS 1                               | <input type="checkbox"/> 66. Processing an Emergency Salary Advance                                |
| <input type="checkbox"/> 39. Selling and Activating Liberty Cash Cards on the IRT                               | <input type="checkbox"/> 67. Processing a Travel Advance Request                                   |
| <input type="checkbox"/> 40. Selling and Activating a Liberty Cash Card on IBM / NCR POS 1                      | <input type="checkbox"/> 68. Accepting and Scanning of a Prepaid Delivery Confirmation Article     |
| <input type="checkbox"/> 41. Purchasing Postal Products and Services with a Liberty Cash Card                   | <input type="checkbox"/> 69. NCR POS 1, Sign-On and Sign-Off Procedures                            |
| <input type="checkbox"/> 42. Selling and Accepting Dinero Seguro/Sure Money                                     | <input type="checkbox"/> 70. NCR POS 1, Procedures for Locking and Unlocking System                |
| <input type="checkbox"/> 43. Selling and Processing Global Priority Mail  | <input type="checkbox"/> 71. IBM POS 1, SO-On and Sign-Off Procedures EI                           |
| <input type="checkbox"/> 44. Selling and Accepting Global Express Guaranteed                                    | <input type="checkbox"/> 72. IBM POS 1, Procedures for Locking and Unlocking System                |
| <input type="checkbox"/> 45. Exchanging of Registered Mail Between Employees                                    | <input type="checkbox"/> 73. IBM POS 1, CloseOut Procedures EI                                     |
| <input type="checkbox"/> 46. Selling and Accepting ISAL, IPA, and Value Post to Canada                          | <input type="checkbox"/> 74. IBM/NCR POS 1, Processing a Meter Refund                              |
| <input type="checkbox"/> 47. Selling and Accepting Global Express Mail  | <input type="checkbox"/> 75. IRT / POS 1, Processing a Refund Using PS Form 3533                   |
| <input type="checkbox"/> 48. Selling and Accepting International M-Bags   | <input type="checkbox"/> 76. IRT / MOB, Close-Out Procedures                                       |
| <input type="checkbox"/> 49. Vacant (Service discontinued)  | <input type="checkbox"/> 77. IRT, Processing of a Meter Refund                                     |
| <input type="checkbox"/> 50. Selling and Accepting International Recorded Delivery                              | <input type="checkbox"/> 78. IRT / POS 1, Voiding and Refunding a Debt Card Transaction            |
| <input type="checkbox"/> 51. Delivering Customs Duty Mail   | <input type="checkbox"/> 79. Manual, IRT / POS 1, Processing of a Travel Request                   |
| <input type="checkbox"/> 52. Selling International Money Orders   | <input type="checkbox"/> 80. WWI Boot-Up Procedures for Unisys Phase III/Clerk Start of Day        |
| <input type="checkbox"/> 53. Cashing MP-1, International Money Order  | <input type="checkbox"/> 81. IRT / POS 1, Processing a Self Service Equipment Refund               |
| <input type="checkbox"/> 54. Securing and Accounting of International Money Orders                              | <input type="checkbox"/> 82. Phase III IRT, Stan-up Procedures                                     |
| <input type="checkbox"/> 55. Processing an International Money Order Inquiry                                    | <input type="checkbox"/> 83. Manual, Close-Out Daily PS Form 1412                                  |
| <input type="checkbox"/> 56. Processing a Post Office Box Caller Service  | <input type="checkbox"/> 84. TRANZ 380 Voiding a Credit Card Transaction                           |
| <input type="checkbox"/> 57. Processing Post Office Box records   | <input type="checkbox"/> 85. NCR POS 1, Close-Out Procedure  |
| <input type="checkbox"/> 58. Procedures for Handling Overflow of Post Office Box Mail                           | <input type="checkbox"/> 86. Selling and accepting Signature Confirmation                          |
| <input type="checkbox"/> 59. Procedures for Post Office Box Flagging System                                     | <input type="checkbox"/> 87. Procedures for scanning special service labels                        |
| <input type="checkbox"/> 60. Postage Meter Setting Procedures and Accompanying Accounting                       |  |

**Attention Manager/Retail Coach****Place a checkmark (✓) in the box all the transactions that take place in your Retail Unit.**

## Structured On-the-Job (SOJT) Certification (Core Lesson Plans)

Name of Retail Associate: \_\_\_\_\_ Name of the Coach: \_\_\_\_\_  
 Office of Assignment: \_\_\_\_\_  
 Date SOJT Completed: \_\_\_\_\_ Office of SOJT: \_\_\_\_\_

Retail Coach - Your initials certify that the Retail Associate named has completed 80% of that lesson plan successfully..  
 Retail Associate - Your initials only certify that you were assigned the lesson plan and that the results were communicated to you.

Mandatory Structured On-the-Job Lesson Plans	Steps in Lesson Plan (a)	# of Steps Completed Successfully (b)	# of Steps Completed Successfully (b/a)	Retail Coach Initials	Retail Associate Initials
1. Selling and Accepting Domestic Express Mail	10				
2. Selling and Accepting Domestic Priority	6				
3. Selling and Accepting Caged Mail	8				
4. Selling and Accepting Delivery Confirmation	7				
5. Selling and Accepting Domestic Numbered Insured Mail	8				
6. Selling and Accepting Unnumbered Insured Mail	8				
7. Selling and Accepting Registered Mail	10				
8. Selling and Accepting C.O.D. Mail	8				
9. Selling and Accepting Return Receipt for Merchandise	8				
10. Selling and Accepting Certificate of Mailing	9				
11. Selling and Accepting Return Receipt AFTER Mailing(Not a Duplicate	6				
12. Identify and Accept Domestic Machineable / Non-Machineable Articles	9				
13. Vacant (combined with lesson plan no.12)					
14. Selling Domestic Postal Money Orders	10				
15. Selling Stamps & Retail/Packaging Products	6				
16. Selling and Accepting Military Mail (APO or FPO)	7				
17. Procedures for Completing Customs Forms	7				
18. Selling and Accepting International Insured Mail	10				
19. Selling and Accepting International Registered Mail	10				
20. Selling Return Receipt on International Mail	9				
21. Retail Acceptance and Processing of Bank Cards	7				
22. Procedures for cashing a Domestic Postal Money Order	9				
23. Security and Accountably for Domestic Money Orders	7				
24. Procedures for renting a Post Office Box	10				
25. Delivery of Registered Mail	9				
26. Delivery Express Mail	9				
27. Delivery of Certified Mail	10				
28. Delivery of Postage Due or Business Reply Mail	7				
29. Delivery of Insured Mail	10				
30. Delivery of Collect On Delivery (COD) Article	10				
31. Dispatching of Registered Mail to the processing and Distribution Center	7				
32. Working with the Express Mail Network Directory	9				

I certify that the Retail Associate has successfully completed the lesson plans checked on this form. The Retail Associate performance has been observed and rated. The results of this evaluation have been communicated to the Retail Associate.

Manager Certification (Signature)	Date (Mo., Day, Year.)
-----------------------------------	------------------------

Total Number of Tasks with 80% or More Steps Completed Correctly:

PS Form 2528

# STRUCTURED ON-THE-JOB PROCESSES

## TABLE OF CONTENTS

1. Selling and Accepting Domestic Express Mail
2. Selling and Accepting Domestic Priority Mail
3. Selling and Accepting Certified Mail
4. Selling and Accepting Delivery Confirmation
5. Selling and Accepting Domestic Numbered Insured Mail
6. Selling and Accepting Domestic Unnumbered Insured Mail
7. Selling and Accepting Domestic Registered Mail
8. Selling and Accepting Domestic C.O.D. Mail
9. Selling and Accepting Domestic Return Receipt for Merchandise
10. Selling and Accepting Domestic Certificate of Mailing
11. Selling and Accepting Domestic Return Receipt AFTER Mailing (Not a Duplicate)
12. Accepting and Identifying Domestic Machineable Articles/Non-Machineable Articles Including Applicable Surcharges
13. Vacant
14. Selling Domestic Postal Money Orders
15. Selling Stamps and Postal Retail/Package Products
16. Selling and Accepting Military Mail (APO or FPO)
17. Completing Customs Forms
18. Selling and Accepting International Insured Mail
19. Selling and Accepting International Registered Mail
20. Selling International Mail Return Receipt
21. Accepting and Processing of Bank Cards
22. Cashing Domestic Postal Money Orders
23. Securing and Accounting for Domestic Money Orders
24. Renting a Post Office Box
25. Delivering Registered Mail
26. Delivering Express Mail
27. Delivering Certified Mail
28. Delivering Postage Due or Business Reply Mail
29. Delivering Domestic Insured Mail
30. Delivering Collect-On-Delivery (COD) Articles
31. Dispatching Registered Mail to the Processing and Distribution Center
32. Working With the Express Mail Network Directory

# Training Worksheet

## Lesson #01

---

**Task:**

Selling and Accepting Domestic Express Mail

---

**Terminal Objective:** review with future Associate  
How to Sell and Accept Domestic Express Mail

---

**Prerequisites:**

\_\_\_\_\_ Sales and Services Associate Training Course  
\_\_\_\_\_ Review GIST  
\_\_\_\_\_ Review Express Mail Network Directory

---

**Supplies and Equipment Needed for This Training Session:**

_____ Customer (role-play) and samples for training	_____ Tag 44, Sack Contents Warning
_____ Express Mail Labels	_____ All necessary forms
_____ Express Network Directory	_____ Express Mail Samples
_____ Retail Equipment	_____ Pen/pencil
_____ Scale/Rate fold	

---

**Note to all RCs teaching this session:**

**Training steps that are specific to clarifying questions to be asked of customer must include pertinent information on any or all of the following:**

- **HAZMAT**
  - **Aviation Security**
  - **Target Mail**
-

# Training Worksheet

Task: Selling and Accepting Domestic Express Mail

---

\_\_\_\_\_ 1. RC will

Demonstrate professional greeting technique (**GIST**).

Future Associate will  
Repeat demonstration.

---

\_\_\_\_\_ 2. RC will

Demonstrate how to ask clarifying questions to determine customer needs (**GIST**).

Future Associate will  
Repeat demonstration.

---

\_\_\_\_\_ 3. RC will

Explain proper PS Forms 11a or B, 3811 (if applicable) and how to complete, assisting customer if necessary.

Future Associate will  
State how to complete forms and assist customer.

---

\_\_\_\_\_ 4. RC will

Explain express insurance and waiver of signature option and endorsements.

Future Associate will  
State express insurance and waiver of delivery option.

---

\_\_\_\_\_ 5. RC will

Explain how to use retail equipment to determine delivery network and fees, if applicable.

Future Associate will  
Repeat demonstration.

---

\_\_\_\_\_ 6. RC will

Explain scanning label and demonstrate affixing postage.

Future Associate will  
Repeat demonstration.

---

\_\_\_\_\_ 7. RC will

Explain value sell technique (**GIST**).

Future Associate will  
Demonstrate value sell.

---



# Training Worksheet

Task: Selling and Accepting Domestic Express Mail

---

\_\_\_\_\_ 8. RC will

Explain customer payment options and process payment (**GIST**).

Future Associate will  
State customer payment options and process payment.

---

\_\_\_\_\_ 9. RC will

Explain closing professionally (**GIST**).

Future Associate will  
Demonstrate closing professionally.

---

\_\_\_\_\_ 10. RC will

Explain/demonstrate where to place article for dispatch.

Future Associate will  
Repeat demonstration.

---

**How tested:**

\_\_\_\_\_ Role-play

\_\_\_\_\_ Customer

Date: \_\_\_\_\_

# Training Worksheet

## Lesson #02

---

Task Name:  
Selling and Accepting Domestic Priority Mail

---

Terminal Objective: review with future Associate  
How to Sell and Accept Domestic Priority Mail

---

Prerequisites:

- \_\_\_\_\_ Sales and Services Associate Training Course
- \_\_\_\_\_ Review **GIST**
- \_\_\_\_\_ Aviation Security Training
- \_\_\_\_\_ HAZMAT Training
- \_\_\_\_\_ Review *Domestic Mail Manual*
- \_\_\_\_\_ Review *Postal Bulletins*

---

Supplies and Equipment Needed for This Training Session:

_____ Customer (role-play)	_____ Retail Equipment
_____ Priority Mail Supplies	_____ Tag 44, Sack Contents Warning
_____ Scale/Ratefold/Zone Chart	_____ Pen/pencil

---

**Note to all RCs teaching this session:**

**Training steps that are specific to clarifying questions to be asked of customer must include pertinent information on any or all of the following:**

- **HAZMAT**
  - **Aviation Security**
  - **Target Mail**
-

# Training Worksheet

Task: Selling and Accepting Domestic Priority Mail.

---

\_\_\_\_\_ 1. RC will

Demonstrate professional greeting technique (**GIST**).

Future Associate will  
Repeat demonstration.

---

\_\_\_\_\_ 2. RC will

Demonstrate how to ask clarifying questions to determine customers needs (**GIST**).

Future Associate will  
Repeat demonstration.

---

\_\_\_\_\_ 3. RC will

Demonstrate processing priority package on IRT/POS ONE, print and affix PVI label.

Future Associate will  
Repeat demonstration.

---

\_\_\_\_\_ 4. RC will

Explain value sell technique (**GIST**).

Future Associate will  
Demonstrate value sell.

---

\_\_\_\_\_ 5. RC will

Explain customer payment options and process payment (**GIST**).

Future Associate will  
State customer payment options and process payment.

---

\_\_\_\_\_ 6. RC will

Explain closing professionally (**GIST**). Include letting customer know about additional supplies.

Future Associate will  
Demonstrate professional closing.

---

\_\_\_\_\_ 7. RC will

Future Associate will

---

# Training Worksheet

Task: Selling and Accepting Domestic Priority Mail.

---

\_\_\_\_\_ 8. RC will

Future Associate will

---

\_\_\_\_\_ 9. RC will

Future Associate will

---

\_\_\_\_\_ 10. RC will

Future Associate will

---

**How tested:**

\_\_\_\_\_ Role-play

\_\_\_\_\_ Customer

Date: \_\_\_\_\_

# Training Worksheet

## Lesson #03

---

Task:  
Selling and Accepting Certified Mail

---

Terminal Objective: review with future Associate  
How to Sell and Accept Certified Mail

---

Prerequisites:  
\_\_\_\_\_ Sales and Services Associate Training Course  
\_\_\_\_\_ Review *Domestic Mail Manual*  
\_\_\_\_\_ Review *Postal Bulletin*  
\_\_\_\_\_ Review **GIST**

---

Supplies and Equipment Needed for This Training Session:

_____ Retail Equipment	_____ Customer (role-play)
_____ Scale/Ratefold	_____ Return receipt stamp
_____ PS Forms	_____ Pen/pencil
_____ Round date stamp	
_____ Postage	

---

# Training Worksheet

Task: Selling and Accepting Certified Mail

---

\_\_\_\_\_ 1. RC will

Demonstrate professional greeting technique (**GIST**).

Future Associate will  
Repeat demonstration.

---

\_\_\_\_\_ 2. RC will

Demonstrate how to ask clarifying questions to determine customer needs (**GIST**).

Future Associate will  
Repeat demonstration.

---

\_\_\_\_\_ 3. RC will

Demonstrate how to complete PS Forms 3800 and 3811 (if requested).

Future Associate will  
Repeat demonstration.

---

\_\_\_\_\_ 4. RC will

Demonstrate review of customer PS Forms 3800 and 3811 (if requested), or Firm Mailing Book, PS Form 3877, to verify all blocks are complete.

Future Associate will  
Repeat demonstration.

---

\_\_\_\_\_ 5. RC will

Demonstrate how to prepare article for mailing, including, round date of PS Form 3800 or PS Form 3877. Print PVI label, if applicable.

Future Associate will  
Repeat demonstration.

---

\_\_\_\_\_ 6. RC will

Explain value sell techniques (**GIST**).

Future Associate will  
Demonstrate value sell.

---

\_\_\_\_\_ 7. RC will

Explain customer payment options and process payment (**GIST**).

Future Associate will  
State customer payment options and process payment.

---

# Training Worksheet

Task: Selling and Accepting Certified Mail

---

\_\_\_\_\_ 8. RC will

Explain closing professionally (**GIST**).

Future Associate will  
Demonstrate professional closing.

---

\_\_\_\_\_ 9. RC will

Future Associate will

---

\_\_\_\_\_ 10. RC will

Future Associate will

---

**How tested:**

\_\_\_\_\_ Role-play

\_\_\_\_\_ Customer

Date: \_\_\_\_\_

# Training Worksheet

## Lesson #04

---

**Task:**

Selling and Accepting Delivery Confirmation

---

**Terminal Objective:** review with future Associate

How to Sell and Accept Delivery Confirmation at the Retail Service Counter

---

**Prerequisites:**

\_\_\_\_\_ Sales and Services Associate Training

\_\_\_\_\_ Review **GIST**

\_\_\_\_\_ Review Domestic Mail Manual

---

**Supplies and Equipment Needed for This Training Session:**

\_\_\_\_\_ Retail Equipment

\_\_\_\_\_ Round date stamp

\_\_\_\_\_ PS Forms

\_\_\_\_\_ Package (training)

\_\_\_\_\_ Customer (role-play)

\_\_\_\_\_ Train Scan Sheet

\_\_\_\_\_ Scale/Ratefold

\_\_\_\_\_ Pen/pencil

---

**Note to all RCs teaching this session:**

**Training steps that are specific to clarifying questions to be asked of customer must include pertinent information on any or all of the following:**

- **HAZMAT**
  - **Aviation Security**
  - **Target Mail**
-



# Training Worksheet

Task: Selling and Accepting Delivery Confirmation

---

\_\_\_\_\_ 1. RC will

Explain/demonstrate professional greeting technique (**GIST**).

Future Associate will  
Repeat demonstration.

---

\_\_\_\_\_ 2. RC will

Explain/demonstrate how to ask clarifying questions to determine customer needs. This includes educating customer on additional services that can be provided. (**GIST**)

Future Associate will  
Repeat demonstration.

---

\_\_\_\_\_ 3. RC will

Explain/demonstrate how to complete PS Form 152 (customer completes).

Future Associate will  
Repeat demonstration.

---

\_\_\_\_\_ 4. RC will

Explain/demonstrate how to use equipment to process service (this includes proper placement of label and round date).

Future Associate will  
Repeat demonstration.

---

\_\_\_\_\_ 5. RC will

Explain/demonstrate value sell technique (**GIST**).

Future Associate will  
Demonstrate value sell.

---

\_\_\_\_\_ 6. RC will

Explain/demonstrate customer payment options and process payment (**GIST**).

Future Associate will  
Repeat demonstration.

---

\_\_\_\_\_ 7. RC will

Explain/demonstrate closing professionally (**GIST**).

Future Associate will  
Demonstrate professional closing.

---

# Training Worksheet

Task: Selling and Accepting Delivery Confirmation

---

\_\_\_\_\_ 8. RC will

Future Associate will

---

\_\_\_\_\_ 9. RC will

Future Associate will

---

\_\_\_\_\_ 10. RC will

Future Associate will

---

**How tested:**

\_\_\_\_\_ Role-play

\_\_\_\_\_ Customer

Date: \_\_\_\_\_

# Training Worksheet

## Lesson #05

---

**Task:**

Selling and Accepting Domestic Numbered Insured Mail

---

**Terminal Objective:** review with future Associate

How to Sell and Accept Domestic Numbered Insured Mail

---

**Prerequisites:**

\_\_\_\_\_ Sales and Services Associate Training Course

\_\_\_\_\_ Review **GIST**

\_\_\_\_\_ Review Domestic Mail Manual

---

**Supplies and Equipment Needed for This Training Session:**

\_\_\_\_\_ PS Forms

\_\_\_\_\_ Customer (role-play)

\_\_\_\_\_ Retail Equipment

\_\_\_\_\_ Tag 44, Sack Contents Warning

\_\_\_\_\_ Round date stamp

\_\_\_\_\_ Pen/pencil

\_\_\_\_\_ Scale/Ratefold

---

**Note to all RCs teaching this session:**

**Training steps that are specific to clarifying questions to be asked of customer must include pertinent information on any or all of the following:**

- **HAZMAT**
  - **Aviation Security**
  - **Target Mail**
-

## Training Worksheet

Task: Selling and Accepting Domestic Numbered Insured Mail

---

\_\_\_\_\_ 1. RC will

Demonstrate professional greeting technique (**GIST**).

Future Associate will  
Repeat demonstration.

---

\_\_\_\_\_ 2. RC will

Demonstrate how to ask clarifying questions to determine customer needs (**GIST**).

Future Associate will  
Repeat demonstration.

---

\_\_\_\_\_ 3. RC will

Explain checking item for proper packaging, size limitations, and complete addressing (item perishable, fragile, or hazardous?).

Future Associate will  
Check package and address blocks.

---

\_\_\_\_\_ 4. RC will

Demonstrate how to calculate postage and fees, including surcharges, if applicable, on equipment. Complete PS Form 3813P and 3811 (if requested), round date.

Future Associate will  
Repeat demonstration.

---

\_\_\_\_\_ 5. RC will

Demonstrate how to detach and endorse PS Forms and affix postage.

Future Associate will  
Repeat demonstration.

---

\_\_\_\_\_ 6. RC will

Explain value sell technique (**GIST**).

Future Associate will  
Demonstrate value sell.

---

\_\_\_\_\_ 7. RC will

Explain customer payment options and process payment (**GIST**).

Future Associate will  
State customer payment options and process payment.

---

# Training Worksheet

Task: Selling and Accepting Domestic Numbered Insured Mail

---

\_\_\_\_\_ 8. RC will

Explain closing professionally (**GIST**).

Future Associate will  
Demonstrate professional closing.

---

\_\_\_\_\_ 9. RC will

Future Associate will

---

\_\_\_\_\_ 10. RC will

Future Associate will

---

**How tested:** \_\_\_\_\_ Role-play      \_\_\_\_\_ Customer

Date: \_\_\_\_\_

# Training Worksheet

## Lesson #06

---

**Task:**

Selling and Accepting Domestic Unnumbered Insured Mail

---

**Terminal Objective:** review with future Associate

How to Sell and Accept Domestic Unnumbered Insured Mail

---

**Prerequisites:**

\_\_\_\_\_ Sales and Services Associate Training Course

\_\_\_\_\_ Review **GIST**

\_\_\_\_\_ Review Domestic Mail Manual

---

**Supplies and Equipment Needed for This Training Session:**

\_\_\_\_\_ Retail Equipment

\_\_\_\_\_ PS Form 3813

\_\_\_\_\_ Round date stamp

\_\_\_\_\_ Customer (role-play)

\_\_\_\_\_ Scale/Ratefold

\_\_\_\_\_ Tag 44, Sack Contents Warning

\_\_\_\_\_ Elliptical Stamp

\_\_\_\_\_ Pen/pencil

---

**Note to all RCs teaching this session:**

**Training steps that are specific to clarifying questions to be asked of customer must include pertinent information on any or all of the following:**

- **HAZMAT**
  - **Aviation Security**
  - **Target Mail**
-

# Training Worksheet

Task: Selling and Accepting Domestic Unnumbered Insured Mail

---

\_\_\_\_\_ 1. RC will

Demonstrate professional greeting technique (**GIST**).

Future Associate will  
Repeat demonstration.

---

\_\_\_\_\_ 2. RC will

Demonstrate how to ask clarifying questions to determine customer needs (**GIST**).

Future Associate will  
Review demonstration.

---

\_\_\_\_\_ 3. RC will

Explain reviewing packaging of item, size limitations and proper addressing and asking customer if the item contains perishable, fragile or hazardous material.

Future Associate will  
Repeat demonstration.

---

\_\_\_\_\_ 4. RC will

Demonstrate how to calculate postage and fees, including any surcharges, and completion of forms, including proper placement of endorsements..

Future Associate will  
State and demonstrate.

---

\_\_\_\_\_ 5. RC will

Demonstrate printing PVI label and affixing postage.

Future Associate will  
Print PVI and affix postage.

---

\_\_\_\_\_ 6. RC will

Explain value sell (**GIST**).

Future Associate will  
Demonstrate value sell.

---

\_\_\_\_\_ 7. RC will

Explain customer payment options and process payment (**GIST**).

Future Associate will  
State customer payment options and process payment.

---

# Training Worksheet

Task: Selling and Accepting Domestic Unnumbered Insured Mail

---

\_\_\_\_\_ 8. RC will

Explain closing professionally (**GIST**).

Future Associate will  
Demonstrate professional closing.

---

\_\_\_\_\_ 9. RC will

Future Associate will

---

\_\_\_\_\_ 10. RC will

Future Associate will

---

**How tested:**

\_\_\_\_\_ Role-play

\_\_\_\_\_ Customer

Date: \_\_\_\_\_



# Training Worksheet

## Lesson #07

---

Task:  
Selling and Accepting Domestic Registered Mail

---

Terminal Objective: review with future Associate  
How to Sell and Accept Domestic Registered Mail

---

Prerequisites:

\_\_\_\_\_ Sales and Services Associate Training Course  
\_\_\_\_\_ Review *Domestic Mail Manual*  
\_\_\_\_\_ Review *Postal Bulletin*  
\_\_\_\_\_ Review **GIST**  
\_\_\_\_\_ DM 901 Registered Manual

---

Supplies and Equipment Needed for This Training Session:

_____ PS Forms	_____ Retail Equipment
_____ Label 200	_____ Tag 44, Sack Contents Warning
_____ Scale/rate fold	_____ Registered Mail Tape
_____ Round date stamp	_____ Samples for training
_____ Customer (role-play)	_____ Pen/pencil

---

**Note to all RCs teaching this session:**

Training steps that are specific to clarifying questions to be asked of customer must include pertinent information on any or all of the following:

- **HAZMAT**
  - **Aviation Security**
  - **Target Mail**
-

## Training Worksheet

Task: Selling and Accepting Domestic Registered Mail

---

\_\_\_\_\_ 1. RC will

Demonstrate professional greeting techniques (**GIST**).

Future Associate will  
Repeat demonstration.

---

\_\_\_\_\_ 2. RC will

Demonstrate how to ask clarifying questions to determine customer needs (**GIST**).

Future Associate will  
Repeat demonstration.

---

\_\_\_\_\_ 3. RC will

Demonstrate what procedures to follow to secure item (i.e., proper packaging, and questions regarding item being fragile, perishable, or hazardous).

Future Associate will  
Repeat demonstration.

---

\_\_\_\_\_ 4. RC will

Explain completion of Forms 3806 & 3811, if requested, to customer, Review PS Form 3877, Firm Mailing Book.

Future Associate will  
Repeat demonstration.

---

\_\_\_\_\_ 5. RC will

Demonstrate how to calculate postage and fees.

Future Associate will  
Repeat demonstration.

---

\_\_\_\_\_ 6. RC will

Demonstrate round dating requirements and proper placement of endorsements and postage.

Future Associate will  
Repeat demonstration.

---

\_\_\_\_\_ 7. RC will

Explain value sell technique (**GIST**).

Future Associate will  
Demonstrate value sell.

---

## Training Worksheet

Task: Selling and Accepting Domestic Registered Mail

---

\_\_\_\_\_ 8. RC will

Explain customer payment options and process payment (**GIST**).

Future Associate will  
State customer payment options and process payment.

---

\_\_\_\_\_ 9. RC will

Explain closing professionally (**GIST**).

Future Associate will  
Demonstrate professional closing.

---

\_\_\_\_\_ 10. RC will

Explain how and where to secure registered article.

Future Associate will  
Repeat demonstration.

---

**How tested:**

\_\_\_\_\_ Role-play

\_\_\_\_\_ Customer

Date: \_\_\_\_\_

# Training Worksheet

## Lesson #08

---

Task:  
Selling and Accepting Domestic COD Mail

---

Terminal Objective: review with future Associate  
How to Sell and Accept Domestic COD Mail

---

Prerequisites:  
\_\_\_\_\_ Sales and Services Retail Training Program  
\_\_\_\_\_ Review **GIST**  
\_\_\_\_\_ Review Domestic Mail Manual

---

Supplies and Equipment Needed for This Training Session:

_____ Retail Equipment	_____ Customer (role-play)
_____ Scale/rate fold	_____ Elliptical stamp
_____ PS Forms	_____ Tag 44
_____ Round date stamp	_____ Pen/pencil
_____ Role-play samples	

---

**Note to all RCs teaching this session:**

**Training steps that are specific to clarifying questions to be asked of customer must include pertinent information on any or all of the following:**

- **HAZMAT**
  - **Aviation Security**
  - **Target Mail**
-

## Training Worksheet

Task: Selling and Accepting Domestic COD Mail

---

\_\_\_\_\_ 1. RC will

Demonstrate professional greeting technique (**GIST**).

Future Associate will  
Repeat demonstration.

---

\_\_\_\_\_ 2. RC will

Demonstrate how to ask clarifying questions to determine customer needs (**GIST**).

Future Associate will  
Repeat demonstration.

---

\_\_\_\_\_ 3. RC will

Explain what additional services are available with COD service (**GIST**).

Future Associate will  
State what services are available with COD.

---

\_\_\_\_\_ 4. RC will

Explain/demonstrate how to complete PS Form 3816. Note: if express, then the express article number is used for delivery receipt and indemnity claims.

Future Associate will  
Repeat demonstration.

---

\_\_\_\_\_ 5. RC will

Demonstrate how to calculate fees and proper placement of endorsements and postage.

Future Associate will  
Calculate fees and affix postage.

---

\_\_\_\_\_ 6. RC will

Explain value sell technique (**GIST**).

Future Associate will  
Demonstrate value sell.

---

\_\_\_\_\_ 7. RC will

Explain customer payment options and process payment (**GIST**).

Future Associate will  
State customer payment options and process payment.

---

# Training Worksheet

Task: Selling and Accepting Domestic COD Mail

---

\_\_\_\_\_ 8. RC will

Explain closing professionally (**GIST**).

Future Associate will  
Demonstrate professional closing.

---

\_\_\_\_\_ 9. RC will

Future Associate will

---

\_\_\_\_\_ 10. RC will

Future Associate will

---

**How tested:** \_\_\_\_\_ Role-play \_\_\_\_\_ Customer

Date: \_\_\_\_\_

# Training Worksheet

## Lesson #09

---

**Task:**

Selling and Accepting Domestic Return Receipt for Merchandise

---

**Terminal Objective:** review with future Associate

How to Sell and Accept a Domestic Return Receipt for Merchandise

---

**Prerequisites:**

\_\_\_\_\_ Sales and Services Retail Training Program

\_\_\_\_\_ Review **GIST**

\_\_\_\_\_ Review Domestic Mail Manual

---

**Supplies and Equipment Needed for This Training Session:**

\_\_\_\_\_ Retail Equipment

\_\_\_\_\_ Scale, ratefold

\_\_\_\_\_ Round date stamp

\_\_\_\_\_ PS Forms

\_\_\_\_\_ Pen/pencil

\_\_\_\_\_ Tag 44, Sack Contents Warning

\_\_\_\_\_ Customer (role-play) and samples for training

---

**Note to all RCs teaching this session:**

**Training steps that are specific to clarifying questions to be asked of customer must include pertinent information on any or all of the following:**

- **HAZMAT**
  - **Aviation Security**
  - **Target Mail**
-

## Training Worksheet

Task: Selling and Accepting Return Receipt for Merchandise

---

\_\_\_\_\_ 1. RC will

Demonstrate professional greeting technique (**GIST**).

Future Associate will  
Repeat demonstration.

---

\_\_\_\_\_ 2. RC will

Demonstrate how to ask clarifying questions to determine customer needs. Determine class of mails (**GIST**).

Future Associate will  
Repeat demonstration.

---

\_\_\_\_\_ 3. RC will

Explain how to instruct customer on completing PS Form 3804 and 3811. Explain waiver of signature option (**GIST**).

Future Associate will  
Repeat demonstration.

---

\_\_\_\_\_ 4. RC will

Demonstrate how to calculate postage and fees.

Future Associate will  
Repeat demonstration.

---

\_\_\_\_\_ 5. RC will

Demonstrate proper placement of endorsements, PS Forms and postage.

Future Associate will  
Repeat demonstration.

---

\_\_\_\_\_ 6. RC will

Explain value sell technique (**GIST**).

Future Associate will  
Demonstrate value sell.

---

\_\_\_\_\_ 7. RC will

Explain customer payment options and process payment (**GIST**).

Future Associate will  
State customer payment options and process payment.

---



# Training Worksheet

Task: Selling and Accepting Return Receipt for Merchandise

---

\_\_\_\_\_ 8. RC will

Explain closing professionally (**GIST**).

Future Associate will  
Demonstrate professional closing.

---

\_\_\_\_\_ 9. RC will

Future Associate will

---

\_\_\_\_\_ 10. RC will

Future Associate will

---

**How tested:**

\_\_\_\_\_ Role-play

\_\_\_\_\_ Customer

Date: \_\_\_\_\_

# Training Worksheet

## Lesson #10

---

Task:  
Selling and Accepting Domestic Certificate of Mailing

---

Terminal Objective: review with future Associate  
How to Sell and Accept Domestic Certificate of Mailing.

---

Prerequisites:  
\_\_\_\_\_ Sales and Services Retail Training Program  
\_\_\_\_\_ Review **GIST**

**NOTE: This process begins after a product or service has been sold to a customer.**

---

Supplies and Equipment Needed for This Training Session:

_____ Customer (role-play)	_____ <i>Domestic Mail Manual</i>
_____ PS Forms	_____ Round date stamp
_____ Retail Equipment	_____ Pen/pencil
_____ Tag 44, Sack Contents Warning	_____ Ratefold

---

## Training Worksheet

Task: Selling and Accepting Domestic Certificate of Mailing

---

\_\_\_\_\_ 1. RC will

Demonstrate professional greeting technique (**GIST**).

Future Associate will  
Repeat demonstration.

---

\_\_\_\_\_ 2. RC will

Demonstrate how to ask clarifying questions to determine customer needs (**GIST**).

Future Associate will  
Repeat demonstration.

---

\_\_\_\_\_ 3. RC will

Demonstrate giving customer PS Form 3817 and assisting, if necessary to complete form (**GIST**).

Future Associate will  
Repeat demonstration.

---

\_\_\_\_\_ 4. RC will

Explain the importance of verifying the PS Form 3817 or PS Form 3877 with the mailpiece.

Future Associate will  
Repeat demonstration.

---

\_\_\_\_\_ 5. RC will

Demonstrate how to affix postage to PS Form 3817 or PS Form 3877. Round date postage on form meter or stamps.

Future Associate will  
Repeat demonstration.

---

\_\_\_\_\_ 6. RC will

Explain value sell techniques (**GIST**).

Future Associate will  
Demonstrate value sell.

---

\_\_\_\_\_ 7. RC will

Explain customer payment options and process payment (**GIST**).

Future Associate will  
State customer payment options and process payment.

---

# Training Worksheet

Task: Selling and Accepting Domestic Certificate of Mailing

---

\_\_\_\_\_ 8. RC will  
Demonstrate giving customer receipt, PS Form 3817 PS Form 3877.

Future Associate will  
Repeat demonstration.

---

\_\_\_\_\_ 9. RC will  
Explain closing professionally (**GIST**).

Future Associate will  
Demonstrate professional closing.

---

\_\_\_\_\_ 10. RC will

Future Associate will

---

**How tested:** \_\_\_\_\_ Role-play \_\_\_\_\_ Customer

Date: \_\_\_\_\_

# Training Worksheet

## Lesson #11

---

**Task:**

Selling and Accepting Domestic Return Receipt AFTER Mailing (Not a Duplicate)

---

**Terminal Objective:** review with future Associate

How to Sell and Accept Domestic Return Receipt Service AFTER Mailing

---

**Prerequisites:**

\_\_\_\_\_ Sales and Services Associate Training Course

\_\_\_\_\_ Review **GIST**

\_\_\_\_\_ Review Domestic Mail Manual

---

**Supplies and Equipment Needed for This Training Session:**

\_\_\_\_\_ PS Forms 3811A and customer mailing receipt

\_\_\_\_\_ Retail Equipment \_\_\_\_\_ Pen/pencil

\_\_\_\_\_ Postage

\_\_\_\_\_ Customer (role-play)

\_\_\_\_\_ Samples for training

---

## Training Worksheet

Task: Selling and Accepting Domestic Return Receipt AFTER Mailing (Not a Duplicate)

---

\_\_\_\_\_ 1. RC will

Demonstrate professional greeting technique (**GIST**).

Future Associate will  
Repeat demonstration.

---

\_\_\_\_\_ 2. RC will

Demonstrate how to ask clarifying questions to determine customer needs. This includes educating customer (**GIST**).

Future Associate will  
Repeat demonstration.

---

\_\_\_\_\_ 3. RC will

Demonstrate completion of PS Form 3811 A. Assist customer as necessary and affix postage.

Future Associate will  
Repeat demonstration.

---

\_\_\_\_\_ 4. RC will

Explain value sell techniques (**GIST**).

Future Associate will  
Demonstrate value sell.

---

\_\_\_\_\_ 5. RC will

Explain customer payment options and process payment (**GIST**).

Future Associate will  
State customer payment options and process payment.

---

\_\_\_\_\_ 6. RC will

Explain closing professionally (**GIST**).

Future Associate will  
Demonstrate professional closing.

---

\_\_\_\_\_ 7. RC will

Future Associate will

---

# Training Worksheet

Task: Selling and Accepting Domestic Return Receipt AFTER Mailing (Not a Duplicate)

---

\_\_\_\_\_ 8. RC will

Future Associate will

---

\_\_\_\_\_ 9. RC will

Future Associate will

---

\_\_\_\_\_ 10. RC will

Future Associate will

---

**How tested:**

\_\_\_\_\_ Role-play

\_\_\_\_\_ Customer

Date: \_\_\_\_\_

# Training Worksheet

## Lesson #12

---

**Task Name:**

Accepting and Identifying Domestic Machineable/Non-Machineable Articles including applicable surcharges

---

**Terminal Objective:**

How to Accept and Identify Domestic Machineable/Non-Machineable parcels including applicable surcharges

---

**Prerequisites:**

\_\_\_\_\_ Sales and Services Associate Training Course

\_\_\_\_\_ Review *Postal Bulletin*

\_\_\_\_\_ Review **GIST**

---

**Supplies and Equipment Needed for This Training Session:**

\_\_\_\_\_ Retail Equipment    \_\_\_\_\_ Stampers    \_\_\_\_\_ Tag 44 Sack Contents Warning

\_\_\_\_\_ Scale/Ratefold    \_\_\_\_\_ Template    \_\_\_\_\_ Pen/pencil

\_\_\_\_\_ Tape Measure    \_\_\_\_\_ Customer

---

**Note to all RCs teaching this session:**

**Training steps that are specific to clarifying questions to be asked of customer must include pertinent information on any or all of the following:**

- **HAZMAT**
  - **Aviation Security**
  - **Target Mail**
-



## Training Worksheet

Task:

---

\_\_\_\_\_ 1. RC will

Demonstrate professional greeting techniques (**GIST**).

Future Associate will  
Repeat demonstration.

---

\_\_\_\_\_ 2. RC will

Explain how to ask clarifying questions to determine customer needs (**GIST**).

Future Associate will  
Ask clarifying questions to determine customer needs.

---

\_\_\_\_\_ 3. RC will

Demonstrate how to inquire from customer if fragile, liquid, perishable, or potentially hazardous.

Future Associate will  
Repeat demonstration.

---

\_\_\_\_\_ 4. RC will

Demonstrate how to determine if item is machineable/non-machineable based on size, weight, or type of article. **Note: Use DMM.**

Future Associate will  
Repeat demonstration.

---

\_\_\_\_\_ 5. RC will

Demonstrate/explain surcharges (Standard B PP Balloon, Non-Standard, Priority Balloon, oversized, non-machineable) on the retail equipment or ratefold.

Future Associate will  
Repeat demonstration.

---

\_\_\_\_\_ 6. RC will

Demonstrate how to prepare package including proper placement of postage, labels, forms and endorsements. **Note: Use DMM..**

Future Associate will  
Repeat demonstration.

---

\_\_\_\_\_ 7. RC will

Explain value sell techniques (**GIST**).

Future Associate will  
Demonstrate value sell.

---

# Training Worksheet

Task:

---

\_\_\_\_\_ 8. RC will  
Explain customer payment options and process payment (GIST)

Future Associate will  
State customer payment options and process payment.

---

\_\_\_\_\_ 9. RC will  
Explain closing professionally (GIST)

Future Associate will  
Demonstrate professional closing.

---

\_\_\_\_\_ 10. RC will

Future Associate will

---

**How tested:**

\_\_\_\_\_ Role-play

\_\_\_\_\_ Customer

Date: \_\_\_\_\_

# Training Worksheet

Lesson #13

---

Vacant

---

# Training Worksheet

## Lesson #14

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### Task:

Selling Domestic Postal Money Orders

---

Terminal Objective: review with future Associate  
How to Sell a Domestic Postal Money Order

---

### Prerequisites:

\_\_\_\_\_ Sales and Services Associate Training Course

\_\_\_\_\_ Review **GIST**

\_\_\_\_\_ Review Domestic Mail Manual

---

### Supplies and Equipment Needed for This Training Session:

\_\_\_\_\_ Money Order Printer

\_\_\_\_\_ Pen/pencil

\_\_\_\_\_ Money Order (training)

\_\_\_\_\_ Retail Equipment

\_\_\_\_\_ Manual tracking form (local)

\_\_\_\_\_ Customer (role-play)

\_\_\_\_\_ PS Forms 8105A & 8105B

---

# Training Worksheet

Task: Selling Domestic Postal Money Orders

---

\_\_\_\_\_ 1. RC will

Demonstrate professional greeting technique (**GIST**).

Future Associate will  
Repeat demonstration.

---

\_\_\_\_\_ 2. RC will

Demonstrate how to ask clarifying questions to determine customer needs (**GIST**).

Future Associate will  
Repeat demonstration.

---

\_\_\_\_\_ 3. RC will

Explain how to review procedures of identifying repeat customers that purchase large amounts of money orders on a regular basis, anti money order laundering system (Bank Secrecy Act).

Future Associate will  
Repeat demonstration.

---

\_\_\_\_\_ 4. RC will

Explain checking money order printer for correct date and then process voucher on local equipment (imprint).

Future Associate will  
Review date on printer and process voucher on equipment.

---

\_\_\_\_\_ 5. RC will

Demonstrate how to review information on money order including verifying number against the Retail Equipment. Review voiding money orders and correcting amounts on retail equipment.

Future Associate will  
State reviewing money order.

---

\_\_\_\_\_ 6. RC will

Explain value sell techniques (**GIST**).

Future Associate will  
Explain value sell.

---

\_\_\_\_\_ 7. RC will

Demonstrate removing postal receipt from voucher, if applicable. State customer payment options and process payment (**GIST**), posting on checklist or in retail equipment.

Future Associate will  
Repeat demonstration.

# Training Worksheet

Task: Selling Domestic Postal Money Orders

---

\_\_\_\_\_ 8. RC will

Explain coaching customer on completing blocks on money orders and maintaining receipts for their records. Complete transaction.

Future Associate will  
Coach customer and demonstrate completing transaction.

---

\_\_\_\_\_ 9. RC will

Explain closing professionally (**GIST**).

Future Associate will  
Demonstrate professional closing.

---

\_\_\_\_\_ 10. RC will

Explain procedure for retaining money order vouchers and posting on checklist.

Future Associate will  
State and demonstrate.

---

**How tested:**

\_\_\_\_\_ Role-play

\_\_\_\_\_ Customer

Date: \_\_\_\_\_

# Training Worksheet

## Lesson #15

---

Task:  
Selling Stamps and Postal Retail/Package Products

---

Terminal Objective: review with future Associate  
How to Sell Stamps and Postal Retail/Package Products

---

Prerequisites:  
\_\_\_\_\_ Sales and Services Associate Training Course  
\_\_\_\_\_ Review **GIST**

---

Supplies and Equipment Needed for This Training Session:  
\_\_\_\_\_ Retail Equipment  
\_\_\_\_\_ Stamp Products or Scan Sheet  
\_\_\_\_\_ Customer (role-play)  
\_\_\_\_\_ Pen/pencil  
\_\_\_\_\_ PO Handbook 130

---

**NOTE to all RCs teaching this session:**  
Training steps that are specific to clarifying questions to be asked of customer must include pertinent information on any or all of the following:

- **HAZMAT**
- **Aviation Security**
- **Target Mail**

# Training Worksheet

Task: Selling Stamps and Postal Retail/Package Products

---

\_\_\_\_\_ 1. RC will

Explain/demonstrate professional customer greeting (**GIST**).

Future Associate will  
Repeat demonstration.

---

\_\_\_\_\_ 2. RC will

Explain/demonstrate different ways to sell loose stamps, books, coils, and packaging products.

Future Associate will  
Repeat demonstration.

---

\_\_\_\_\_ 3. RC will

Explain/demonstrate how to ask clarifying questions to determine customer needs (**GIST**).

Future Associate will  
Repeat demonstration.

---

\_\_\_\_\_ 4. RC will

Explain value sell.

Future Associate  
Explain value sell.

---

\_\_\_\_\_ 5. RC will

Explain customer payment options and process payment (**GIST**).

Future Associate will  
State customer payment options and process payment.

---

\_\_\_\_\_ 6. RC will

Explain closing professionally (**GIST**).

Future Associate will  
Demonstrate professional closing.

---

\_\_\_\_\_ 7. RC will

Future Associate will

---



# Training Worksheet

Task: Selling Stamps and Postal Retail/Package Products

---

\_\_\_\_\_ 8. RC will

Future Associate will

---

\_\_\_\_\_ 9. RC will

Future Associate will

---

\_\_\_\_\_ 10. RC will

Future Associate will

---

**How tested:**

\_\_\_\_\_ Role-play

\_\_\_\_\_ Customer

Date: \_\_\_\_\_

# Training Worksheet

## Lesson #16

---

**Task:**

Selling and Accepting Military Mail (APO or FPO)

---

Terminal Objective: review with future Associate  
How to Sell and Accept Military Mail to an APO or FPO

---

**Prerequisites:**

\_\_\_\_\_ Sales and Services Associate Training Course  
\_\_\_\_\_ Review **GIST**  
\_\_\_\_\_ Review *Postal Bulletin*  
\_\_\_\_\_ Review Domestic Mail Manual

---

**Supplies and Equipment Needed for This Training Session:**

_____ Mail Samples	_____ Scale/Ratefold
_____ PAL/SAM stamps	_____ Pen/pencil
_____ Customs forms	_____ Customer (role-play)
_____ Round date stamp	
_____ Retail Equipment	

---

**Note to all RCs teaching this session:**

Training steps that are specific to clarifying questions to be asked of customer must include pertinent information on any or all of the following:

- **HAZMAT**
  - **Aviation Security**
  - **Target Mail**
-

# Training Worksheet

Task: Selling and Accepting Military Mail (APO or FPO)

---

\_\_\_\_\_ 1. RC will

Demonstrate a professional greeting technique (**GIST**).

Future Associate will  
Repeat demonstration.

---

\_\_\_\_\_ 2. RC will

Demonstrate how to ask clarifying questions to determine customer needs. Use *Postal Bulletin* to review restrictions. (**GIST**). Note: Review SAM and PAL.

Future Associate will  
Repeat demonstration.

---

\_\_\_\_\_ 3. RC will

Demonstrate how to complete customs forms. Cover aviation security questions.

Future Associate will  
Repeat demonstration.

---

\_\_\_\_\_ 4. RC will

Demonstrate how to calculate postage and fees. Demonstrate proper placement of postage, endorsements and customs forms.

Future Associate will  
Repeat demonstration.

---

\_\_\_\_\_ 5. RC will

Explain value sell technique (**GIST**).

Future Associate will  
Demonstrate value sell.

---

\_\_\_\_\_ 6. RC will

Explain customer payment options and process payment (**GIST**).

Future Associate will  
State customer payment options and process payment.

---

\_\_\_\_\_ 7. RC will

Explain closing professionally (**GIST**).

Future Associate will  
Demonstrate professional closing.

---

# Training Worksheet

Task: Selling and Accepting Military Mail (APO or FPO)

---

\_\_\_\_\_ 8. RC will

Future Associate will

---

\_\_\_\_\_ 9. RC will

Future Associate will

---

\_\_\_\_\_ 10. RC will

Future Associate will

---

**How tested:**

\_\_\_\_\_ Role-play

\_\_\_\_\_ Customer

Date: \_\_\_\_\_

# Training Worksheet

## Lesson #17

---

Task:  
Completing Customs Forms

---

Terminal Objective: review with future Associate  
How to Complete Customs Forms

---

Prerequisites:  
\_\_\_\_\_ Sales and Services Associate Training Course  
\_\_\_\_\_ Review **GIST**  
\_\_\_\_\_ Review *Postal Bulletin*  
\_\_\_\_\_ Review *Domestic Mail Manual*  
\_\_\_\_\_ Review *International Mail Manual*

---

Supplies and Equipment Needed for This Training Session:

_____ PS Form 3813P	_____ Scale/Ratefold
_____ Retail Equipment	_____ Round date stamp
_____ <i>Postal Bulletin</i> updates	_____ Pen/pencil
_____ Customer (role-play) and	_____ Custom Forms
_____ Mailpiece Samples	

---

**Note to all RCs teaching this session:**

**Training steps that are specific to clarifying questions to be asked of customer must include pertinent information on any or all of the following:**

- **HAZMAT**
  - **Aviation Security**
  - **Target Mail**
-

# Training Worksheet

Task: Completing Customs Forms

---

\_\_\_\_\_ 1. RC will

Explain how to determine appropriate customs forms. Use IMM for reference (**GIST**).

Future Associate will  
Identify appropriate customs form using the *International Mail Manual*.

---

\_\_\_\_\_ 2. RC will

Demonstrate how to assist customer in completing forms and explain the purpose (**GIST**).

Future Associate will  
Repeat demonstration.

---

\_\_\_\_\_ 3. RC will

Demonstrate how to verify proper completion of Customs Forms.

Future Associate will  
Repeat demonstration.

---

\_\_\_\_\_ 4. RC will

Demonstrate proper placement of postage, endorsements and Customs Forms. Explain to customer retention of copy.

Future Associate will  
Prepare article for mailing.

---

\_\_\_\_\_ 5. RC will

Explain value sell technique (**GIST**).

Future Associate will  
Demonstrate value sell.

---

\_\_\_\_\_ 6. RC will

Explain customer payment options and process payment (**GIST**).

Future Associate will  
State customer payment options and process payment.

---

\_\_\_\_\_ 7. RC will

Explain closing professionally (**GIST**).

Future Associate will  
Demonstrate professional closing.

---

# Training Worksheet

Task: Completing Customs Forms

---

\_\_\_\_\_ 8. RC will

Future Associate will

---

\_\_\_\_\_ 9. RC will

Future Associate will

---

\_\_\_\_\_ 10. RC will

Future Associate will

---

**How tested:**

\_\_\_\_\_ Role-play

\_\_\_\_\_ Customer

Date: \_\_\_\_\_

# Training Worksheet

## Lesson #18

---

Task:  
Selling and Accepting International Insured Mail

---

Terminal Objective: review with future Associate  
How to Sell and Accept International Insured Mail

---

Prerequisites:  
\_\_\_\_\_ Sales and Services Associate Training Course  
\_\_\_\_\_ Review **GIST**  
\_\_\_\_\_ Review International Mail Manual

---

Supplies and Equipment Needed for This Training Session:

_____ Retail Equipment	_____ Round date stamp
_____ Scale/Individual Country Listing (IMM)	_____ Par Avion and Surface
_____ PS Forms	_____ Tag 44 Sack Contents Warning
_____ Customer (role-play)	_____ Mailpiece Samples
_____ Pen/pencil	

---

**Note to all RCs teaching this session:**

**Training steps that are specific to clarifying questions to be asked of customer must include pertinent information on any or all of the following:**

- **HAZMAT**
  - **Aviation Security**
  - **Target Mail**
-



## Training Worksheet

Task: Selling and Accepting International Insured Mail

---

\_\_\_\_\_ 1. RC will

Demonstrate professional greeting technique (**GIST**).

Future Associate will  
Repeat demonstration.

---

\_\_\_\_\_ 2. RC will

Demonstrate how to ask clarifying questions to determine customer needs (**GIST**).

Future Associate will  
Repeat demonstration.

---

\_\_\_\_\_ 3. RC will

Explain how to check in the IMM for package restrictions and verify contents and packaging with the customer. Also ask if fragile, liquid, hazardous; verify addressing and insurance availability (**GIST**).

Future Associate will  
State restrictions using the IMM and verify contents and packaging. Will also ask if article is fragile, liquid, and hazardous.

---

\_\_\_\_\_ 4. RC will

Explain how to assist customer in filling out PS Forms 2976 A and 3813P and how to verify information on completed forms. Calculate postage and fees. Also explain endorsements.

Future Associate will  
State how to assist customer in preparing customs forms and how to verify completed forms.

---

\_\_\_\_\_ 5. RC will

Demonstrate how to complete postal section of Customs forms using the Special Drawing Rights conversion chart.

Future Associate will  
Repeat demonstration.

---

\_\_\_\_\_ 6. RC will

Demonstrate proper placement of PS forms, endorsements and postage.

Future Associate will  
State how to attach all forms, endorsements, and postage to mailpiece.

---

\_\_\_\_\_ 7. RC will

Explain to customer the importance of insurance receipt retention. (**GIST**).

Future Associate will  
Repeat demonstration.

# Training Worksheet

Task: Selling and Accepting International Insured Mail

---

\_\_\_\_\_ 8. RC will

Explain value sell technique (**GIST**).

Future Associate will  
Explain value sell.

---

\_\_\_\_\_ 9. RC will

Explain customer payment options and process payment (**GIST**).

Future Associate will  
State customer payment options and process payment.

---

\_\_\_\_\_ 10. RC will

Explain closing professionally (**GIST**).

Future Associate will  
Demonstrate professional closing.

---

**How tested:** \_\_\_\_\_ Role-play \_\_\_\_\_ Customer

Actual Teaching Time (Min.): \_\_\_\_\_

Date: \_\_\_\_\_

# Training Worksheet

## Lesson #19

---

Task:  
Selling and Accepting International Registered Mail

---

Terminal Objective: review with future Associate  
How to Sell and Accept International Registered Mail

---

Prerequisites:

\_\_\_\_\_ Sales and Services Associate Training Course  
\_\_\_\_\_ Review **GIST** \_\_\_\_\_ Review DM-901  
\_\_\_\_\_ Review International Mail Manual

---

Supplies and Equipment Needed for This Training Session:

_____ Scale/ICL/IMM /	_____ Retail Equipment
_____ Scale/rate fold	_____ Paper Tape
_____ PS Form 3806	_____ Tag 44
_____ Label 200	_____ Pen/pencil
_____ Label 19B	_____ Customer (role-play)
_____ Customs forms	
_____ Round date stamp	

---

**Note to all RCs teaching this session:**

Training steps that are specific to clarifying questions to be asked of customer must include pertinent information on any or all of the following:

- **HAZMAT**
  - **Aviation Security**
  - **Target Mail**
-

# Training Worksheet

Task: Selling and Accepting International Registered Mail

---

\_\_\_\_\_ 1. RC will

Demonstrate professional greeting technique (**GIST**).

Future Associate will  
Repeat demonstration.

---

\_\_\_\_\_ 2. RC will

Demonstrate how to ask clarifying questions to determine customer needs (**GIST**).

Future Associate will  
Repeat demonstration.

---

\_\_\_\_\_ 3. RC will

Demonstrate how to check ICLs in the IMM for prohibitions, restrictions, observations, and correct customs forms.

Future Associate will  
Repeat demonstration.

---

\_\_\_\_\_ 4. RC will

Explain packaging requirements for International Registered Mail and maximum indemnity.

Future Associate will  
State proper packaging requirements.

---

\_\_\_\_\_ 5. RC will

Demonstrate completing necessary forms: i.e., customs, PS Form 3806.

Future Associate will  
Repeat demonstration.

---

\_\_\_\_\_ 6. RC will

Demonstrate proper placement of Label 200, endorsements, and postmarks (on back of mailpiece and on all seams).

Future Associate will  
Repeat demonstration.

---

\_\_\_\_\_ 7. RC will

Calculate postage and fees. Affix postage.

Future Associate will  
State how to attach postage and fees.

---

# Training Worksheet

Task: Selling and Accepting International Registered Mail.

---

\_\_\_\_\_ 8. RC will

Explain value sell technique (**GIST**).

Future Associate will  
Explain value sell.

---

\_\_\_\_\_ 9. RC will

Explain customer payment options and process payment (**GIST**).

Future Associate will  
State customer payment options and process payment.

---

\_\_\_\_\_ 10. RC will

Explain closing professionally (**GIST**), explain where and how to secure International Registered article.

Future Associate will  
Demonstrate professional closing and storing of article.

---

**How tested:** \_\_\_\_\_ Role-play \_\_\_\_\_ Customer

Date: \_\_\_\_\_

# Training Worksheet

## Lesson #20

---

Task:  
Selling and Accepting International Mail Return Receipt

---

Terminal Objective: review with future Associate  
How to Sell and Accept International Mail Return Receipt

---

Prerequisites:  
\_\_\_\_\_ Sales and Services Retail Training Program  
\_\_\_\_\_ Review **GIST**  
\_\_\_\_\_ Review International Mail Manual

---

Supplies and Equipment Needed for This Training Session:

_____ Postal Form 3813P	_____ Custom forms
_____ PS Form 2865	_____ Tag 44, Sack Contents Warning
_____ PS Form 8099	_____ Label 200
_____ Scale/ICL (IMM)	_____ Customer (role-play)
_____ Pen/pencil	_____ Retail Equipment

---

**Note to all RCs teaching this session:**

**Training steps that are specific to clarifying questions asked of customer must include pertinent information on any or all of the following:**

- **HAZMAT**
  - **Aviation Security**
  - **Target Mail**
-

## Training Worksheet

Task: Selling and Accepting International Mail Return Receipt

---

\_\_\_\_\_ 1. RC will

Demonstrate professional greeting technique (**GIST**).

Future Associate will  
Repeat demonstration.

---

\_\_\_\_\_ 2. RC will

Demonstrate how to ask clarifying questions to determine customer needs (**GIST**).

Future Associate will  
Repeat demonstration.

---

\_\_\_\_\_ 3. RC will

Explain to customer the Return Receipt availability using the *International Mail Manual* or retail equipment.

Future Associate will  
Repeat demonstration.

---

\_\_\_\_\_ 4. RC will

Explain to customer how to complete PS Form 2865.

Future Associate will  
State and demonstrate how customer will fill out PS Form 2865.

---

\_\_\_\_\_ 5. RC will

Explain/demonstrate how to complete corresponding forms. Prepare article for mailing.

Future Associate will  
Repeat demonstration.

---

\_\_\_\_\_ 6. RC will

Demonstrate how to calculate postage and fees. Demonstrate proper placement of PS Forms, endorsements and postage.

Future Associate will  
Repeat demonstration.

---

\_\_\_\_\_ 7. RC will

Explain value sell technique (**GIST**).

Future Associate will  
Explain value sell.

---

# Training Worksheet

Task: Selling and Accepting International Mail Return Receipt

---

\_\_\_\_\_ 8. RC will

Explain customer payment options and process payment (**GIST**).

Future Associate will  
State customer payment options and process payment.

---

\_\_\_\_\_ 9. RC will

Explain closing professionally (**GIST**).

Future Associate will  
Explain professional closing.

---

\_\_\_\_\_ 10. RC will

Future Associate will

---

**How tested:**

\_\_\_\_\_ Role-play

\_\_\_\_\_ Customer

Date: \_\_\_\_\_



# Training Worksheet

## Lesson #21

---

Task Name:

Accepting and Processing Bank Cards

---

Terminal Objective: review with future Associate

How to Accept and Process a Bank Card Transaction

---

Prerequisites:

\_\_\_\_\_ Sales and Services Associate Training

\_\_\_\_\_ Review **GIST**

---

**NOTE: This training process begins after the sale of a product or service.**

Training Tools:

\_\_\_\_\_ TRANZ 380

\_\_\_\_\_ Pen/pencil

\_\_\_\_\_ Retail Equipment

\_\_\_\_\_ Training bank card

\_\_\_\_\_ Customer (role-play)

---

# Training Worksheet

Task: Accepting and Processing Bank Cards

---

\_\_\_\_\_ 1. RC will

Explain types of bank cards accepted and review information on card (**GIST**).

Future Associate will

State what types of cards are accepted and review items on card.

---

\_\_\_\_\_ 2. RC will

Demonstrate what keys are used on Trans 380 to process debit or credit transaction.

Future Associate will

Repeat demonstration.

---

\_\_\_\_\_ 3. RC will

Demonstrate how to swipe the customer bank card.

Future Associate will

Repeat demonstration.

---

\_\_\_\_\_ 4. RC will

Demonstrate entering 2-digit ID and 4-digit password and amount of sale. Demonstrate PIN Pad and cash back option.

Future Associate will

Repeat demonstration.

---

\_\_\_\_\_ 5. RC will

Explain reviewing signature compared to bank card and proper distribution of receipts.

Future Associate will

State reviewing signature and distribution of receipts.

---

\_\_\_\_\_ 6. RC will

Explain closing professionally (**GIST**).

Future Associate will

Demonstrate professional closing.

---

\_\_\_\_\_ 7. RC will

Explain securing original receipt of transaction.

Future Associate will

State securing original receipt.

---

# Training Worksheet

Task: Accepting and Processing Bank Cards

---

\_\_\_\_\_ 8. RC will

Future Associate will

---

\_\_\_\_\_ 9. RC will

Future Associate will

---

\_\_\_\_\_ 10. RC will

Future Associate will

---

**How tested:**

\_\_\_\_\_ Role-play

\_\_\_\_\_ Customer

Date: \_\_\_\_\_

# Training Worksheet

## Lesson #22

---

Task:  
Cashing Domestic Postal Money Orders

---

Terminal Objective: review with future Associate  
How to Cash a Domestic Postal Money Order

---

Prerequisites:

\_\_\_\_\_ Sales and Services Associate Training Course  
\_\_\_\_\_ Review **GIST**                      \_\_\_\_\_ Review *Domestic Mail Manual*  
\_\_\_\_\_ Review *Postal Bulletin*        \_\_\_\_\_ Review *Postal Operations Manual*  
\_\_\_\_\_ Review F1

---

Supplies and Equipment Needed for This Training Session:

\_\_\_\_\_ Training Money Order                      \_\_\_\_\_ Round date stamp  
\_\_\_\_\_ Pen/pencil    \_\_\_\_\_ Customer (role-play)  
\_\_\_\_\_ Bank deposit stamp                              \_\_\_\_\_ Play Money (training)  
\_\_\_\_\_ Retail Equipment

---

# Training Worksheet

Task: Cashing Domestic Postal Money Orders

---

\_\_\_\_\_ 1. RC will

Demonstrate professional greeting technique (**GIST**).

Future Associate will  
Repeat demonstration.

---

\_\_\_\_\_ 2. RC will

Demonstrate how to ask clarifying questions to determine customer needs (**GIST**).

Future Associate will  
Repeat demonstration.

---

\_\_\_\_\_ 3. RC will

Explain how to verify that funds are available (bank secrecy act).

Future Associate will  
Verify funds are available.

---

\_\_\_\_\_ 4. RC will

Explain signature requirement and verifying with ID. (**GIST**).

Future Associate will  
State customer requirements.

---

\_\_\_\_\_ 5. RC will

Demonstrate checking money order against stolen money order list and examine money order.

Future Associate will  
Repeat demonstration.

---

\_\_\_\_\_ 6. RC will

Explain how to enter transaction into retail equipment. Enter on list.

Future Associate will  
Repeat statement, then demonstrate.

---

# Training Worksheet

Task: Cashing Domestic Postal Money Orders

---

\_\_\_\_\_ 7. RC will

Explain value sell (**GIST**).

Future Associate will  
Explain value sell.

---

\_\_\_\_\_ 8. RC will

Explain customer payment options if customer makes additional purchase, and count funds to customer. (**GIST**).

Future Associate will  
Repeat demonstration.

---

\_\_\_\_\_ 9. RC will

Explain closing professionally (**GIST**).

Future Associate will  
Demonstrate closing professionally.

---

**How tested:**

\_\_\_\_\_ Role-play

\_\_\_\_\_ Customer

Date: \_\_\_\_\_

# Training Worksheet

## Lesson #23

---

### Task:

Securing and Accounting for Domestic Money Orders

---

Terminal Objective: review with future Associate

How to Secure and Account for Domestic Money Orders

---

### Prerequisites:

\_\_\_\_\_ Sales and Services Associate Training

\_\_\_\_\_ Review F-1

---

### Supplies and Equipment Needed for This Training Session:

\_\_\_\_\_ Retail Equipment

\_\_\_\_\_ Pen/pencil

\_\_\_\_\_ PS Form 17

---

# Training Worksheet

Task: Securing and Accounting for Domestic Money Orders

---

\_\_\_\_\_ 1. RC will

Explain proper ordering procedures using PS Form 17 and handing to designated employee.

Future Associate will  
Order using PS Form 17.

---

\_\_\_\_\_ 2. RC will

Demonstrate opening block set of money order package and verifying sequence (count).

Future Associate will  
Repeat demonstration.

---

\_\_\_\_\_ 3. RC will

Explain matching money order sequence to log book, then sign.

Future Associate will  
Show matching money orders to log book and sign.

---

\_\_\_\_\_ 4. RC will

Explain procedures for entering/acknowledging domestic money orders into Retail Equipment.

Future Associate will  
Enter/acknowledge money orders into Retail Equipment.

---

\_\_\_\_\_ 5. RC will

Explain the importance of issuing money orders in sequence and security of money orders.

Future Associate will  
State importance of issuing money orders in sequence.

---

\_\_\_\_\_ 6. RC will

Explain that money orders should not be transferred between clerks except in an emergency and how to complete this process. **Note:** *Money orders cannot be transferred between clerks on NCR POS.*

Future Associate will  
State that money orders cannot be transferred between clerks except in an emergency and explain process.

---

\_\_\_\_\_ 7. RC will

Explain office security measures at retail counter and at the end of tour.

Future Associate will  
State office security measures at the retail counter and at the end of tour.

---



# Training Worksheet

Task: Securing and Accounting for Domestic Money Orders

---

\_\_\_\_\_ 8. RC will

Future Associate will

---

\_\_\_\_\_ 9. RC will

Future Associate will

---

\_\_\_\_\_ 10. RC will

Future Associate will

---

**How tested:**

\_\_\_\_\_ Role-play

\_\_\_\_\_ Customer

Date: \_\_\_\_\_

# Training Worksheet

## Lesson #24

---

### Task:

Renting a Post Office Box

---

Terminal Objective: review with future Associate

How to Rent a Post Office Box

---

### Prerequisites:

\_\_\_\_\_ Sales and Services Associate Training Course

\_\_\_\_\_ Review *Domestic Mail Manual*

\_\_\_\_\_ Review **GIST**

\_\_\_\_\_ Review *Postal Operations Manual*

---

### Supplies and Equipment Needed for This Training Session:

\_\_\_\_\_ PS Form 1538

\_\_\_\_\_ PS Form 3544

\_\_\_\_\_ PS Form 1093

\_\_\_\_\_ PS Form 1091

\_\_\_\_\_ P. O. Box rent fee schedule

\_\_\_\_\_ Round date stamp

\_\_\_\_\_ *Domestic Mail Manual*

\_\_\_\_\_ Customer (role-play)

\_\_\_\_\_ Retail Equipment

\_\_\_\_\_ Pen/pencil

---

## Training worksheet

Task: Renting a Post Office Box

---

\_\_\_\_\_1. RC will

Demonstrate professional greeting technique (**GIST**).

Future Associate will  
Repeat demonstration.

---

\_\_\_\_\_2. RC will

Demonstrate how to ask clarifying questions to determine customer needs (**GIST**).

Future Associate will  
Repeat demonstration.

---

\_\_\_\_\_3. RC will

Demonstrate how to help customer complete the PS Form 1093 (advise about no individual change of address from a Post Office Box).

Future Associate will  
Repeat demonstration.

---

\_\_\_\_\_4. RC will

Demonstrate how to review and verify application information. Complete information on PS Form 1093. Note: Customer must present two forms of identification; one must be photo ID.

Future Associate will  
Repeat demonstration.

---

\_\_\_\_\_5. RC will

Demonstrate how to issue correct box size, key(s), and PS Form 3575 if needed.

Future Associate will  
Repeat demonstration.

---

\_\_\_\_\_6. RC will

Explain how to enter information on retail equipment and demonstrate how to fill out PS Form 1538, if applicable.

Future Associate will  
Repeat demonstration.

---

\_\_\_\_\_7. RC will

Demonstrate how to complete PS Form 3544.

Future Associate will  
Repeat demonstration.

---

# Training Worksheet

Task: Renting a Post Office Box

---

\_\_\_\_\_ 8. RC will

Explain value sell technique (**GIST**).

Future Associate will  
Explain value sell.

---

\_\_\_\_\_ 9. RC will

Explain customer payment options and process payment (**GIST**).

Future Associate will  
State customer payment options and process payment.

---

\_\_\_\_\_ 10. RC will

Explain closing professionally (**GIST**). Follow local procedures for form disposition.

Future Associate will  
Close professionally.

---

**How tested:**

\_\_\_\_\_ Role-play

\_\_\_\_\_ Customer

Date: \_\_\_\_\_

# Training Worksheet

## Lesson #25

---

### Task:

Delivering Registered Mail

---

Terminal Objective: review with future Associate

How to Deliver Registered Mail

---

### Prerequisites:

\_\_\_\_\_ Sales and Services Retail Training

\_\_\_\_\_ Review *Domestic Mail Manual*

\_\_\_\_\_ Review *Postal Bulletins*

\_\_\_\_\_ Review **GIST**

\_\_\_\_\_ Review DM-901

---

### Supplies and Equipment Needed for This Training Session:

\_\_\_\_\_ Pen/pencil

\_\_\_\_\_ PS Forms 3849, 3811, 3854

\_\_\_\_\_ Customer (role-play)

\_\_\_\_\_ Role-play samples

\_\_\_\_\_ Retail Equipment

---

# Training Worksheet

Task: Delivering Registered Mail

---

\_\_\_\_\_ 1. RC will

Demonstrate professional greeting technique (**GIST**).

Future Associate will  
Repeat demonstration.

---

\_\_\_\_\_ 2. RC will

Explain obtaining PS Form 3849 from customer, reviewing form, and requesting identification. If customer has no PS Form 3849, inquire and review identification (**GIST**).

Future Associate will  
Repeat demonstration.

---

\_\_\_\_\_ 3. RC will

Demonstrate retrieving article in unit **after** securing equipment and cash drawer.

Future Associate will  
Repeat demonstration.

---

\_\_\_\_\_ 4. RC will

Explain purpose for maintaining control of article.

Future Associate will  
State purpose of maintaining control of article.

---

\_\_\_\_\_ 5. RC will

Demonstrate where customer signs for article on PS Forms 3849 and 3811, if applicable. Explain non-revenue key on equipment and depress. Scan for signature capture, as needed.

Future Associate will  
Repeat demonstration.

---

\_\_\_\_\_ 6. RC will

Explain value sell techniques (**GIST**).

Future Associate will  
Demonstrate value sell.

---

\_\_\_\_\_ 7. RC will

Explain customer payment options and process payment if customer makes purchase (**GIST**).

Future Associate will  
State customer payment options and process payment.

---

# Training Worksheet

Task: Delivering Registered Mail

---

\_\_\_\_\_ 8. RC will

Explain closing professionally (**GIST**).

Future Associate will  
Demonstrate professional closing.

---

\_\_\_\_\_ 9. RC will

Explain/demonstrate how and where to file PS Form 3849 locally.

Future Associate will  
Repeat demonstration.

---

\_\_\_\_\_ 10. RC will

Future Associate will

---

**How tested:**

\_\_\_\_\_ Role-play

\_\_\_\_\_ Customer

Date: \_\_\_\_\_

# Training Worksheet

## Lesson #26

---

Task:

Delivering Express Mail

---

Terminal Objective: review with future Associate

How to Deliver an Express Mail Article

---

Prerequisites:

\_\_\_\_\_ Sales and Services Retail Training Program

\_\_\_\_\_ Review *Domestic Mail Manual*

\_\_\_\_\_ Review of **GIST**

\_\_\_\_\_ Review *Postal Operations Manual*

---

Supplies and Equipment Needed for This Training Session:

\_\_\_\_\_ Customer (role-play)

\_\_\_\_\_ PS Form 3849

\_\_\_\_\_ Retail Equipment

\_\_\_\_\_ Pen/pencil

---



# Training Worksheet

Task: Delivering Express Mail

---

\_\_\_\_\_ 1. RC will

Demonstrate professional greeting technique (**GIST**).

Future Associate will  
Repeat demonstration.

---

\_\_\_\_\_ 2. RC will

Explain reviewing customer's PS Form 3849 and requesting to see identification.

Future Associate will  
Review PS Form 3849 and customer's identification.

---

\_\_\_\_\_ 3. RC will

Using security procedures, show office location of Express Mail item and retrieve.

Future Associate will  
Repeat demonstration.

---

\_\_\_\_\_ 4. RC will

Explain what blocks the customer and the employee complete. If applicable, perform delivery scan and explain waiver of signature.

Future Associate will  
State what blocks are completed.

---

\_\_\_\_\_ 5. RC will

Explain removing USPS copy of form and handing customer the item.

Future Associate will  
Repeat demonstration.

---

\_\_\_\_\_ 6. RC will

Explain value sell technique. (**GIST**).

Future Associate will  
Demonstrate value sell.

---

\_\_\_\_\_ 7. RC will

Explain customer payment options and process payment if customer makes purchase (**GIST**).

Future Associate will  
State customer payment options and process payment.

---

# Training Worksheet

Task: Delivering Express Mail

---

\_\_\_\_\_ 8. RC will

Explain closing professionally (**GIST**).

Future Associate will  
Demonstrate professional closing.

---

\_\_\_\_\_ 9. RC will

Explain/demonstrate where to file Express Mail label locally.

Future Associate will  
Repeat demonstration.

---

\_\_\_\_\_ 10. RC will

Future Associate will

---

**How tested:**

\_\_\_\_\_ Role-play

\_\_\_\_\_ Customer

Date: \_\_\_\_\_

# Training Worksheet

## Lesson #27

---

### Task:

Delivering Certified Mail

---

Terminal Objective: review with future Associate

How to Deliver Certified Mail

---

### Prerequisites:

\_\_\_\_\_ Sales and Services Retail Training Program

\_\_\_\_\_ Review **GIST**

\_\_\_\_\_ Review *Domestic Mail Manual*

\_\_\_\_\_ Review *Postal Operations Manual*

---

### Supplies and Equipment Needed for This Training Session:

\_\_\_\_\_ Customer (role-play)

\_\_\_\_\_ Sample item

\_\_\_\_\_ Round date stamp

\_\_\_\_\_ PS Form 3849

\_\_\_\_\_ Retail Equipment

\_\_\_\_\_ Pen/pencil

---

# Training Worksheet

Task: Delivering Certified Mail

---

\_\_\_\_\_ 1. RC will

Demonstrate professional greeting technique (**GIST**).

Future Associate will  
Repeat demonstration.

---

\_\_\_\_\_ 2. RC will

Explain obtaining PS Form 3849 from customer, reviewing form, and requesting identification. If customer has no PS Form 3849, inquire and review identification (**GIST**).

Future Associate will  
Repeat demonstration.

---

\_\_\_\_\_ 3. RC will

Explain checking customer's identification and then retrieving article (secure cash drawer and equipment).

Future Associate will  
Repeat demonstration.

---

\_\_\_\_\_ 4. RC will

Explain identifying the certified item as correct and then reviewing item for return receipt.

Future Associate will  
Repeat demonstration.

---

\_\_\_\_\_ 5. RC will

Explain where customer signs for item on PS Form 3849 and PS Form 3811 return receipt (if needed). Scan for signature capture, as needed.

Future Associate will  
Repeat demonstration.

---

\_\_\_\_\_ 6. RC will

Explain where to sign and date USPS blocks on PS Forms 3849 and 3811 (if needed). Explain the non-revenue key on retail equipment.

Future Associate will  
Repeat demonstration.

---

\_\_\_\_\_ 7. RC will

Explain value sell techniques (**GIST**).

Future Associate will  
Demonstrate value sell.

---

# Training Worksheet

Task: Delivering Certified Mail

---

\_\_\_\_\_ 8. RC will

Suggest customer payment options and process payment. This process is used only if customer makes a purchase (**GIST**).

Future Associate will  
State customer payment options and process payment.

---

\_\_\_\_\_ 9. RC will

Explain closing professionally (**GIST**).

Future Associate will  
Demonstrate professional closing.

---

\_\_\_\_\_ 10. RC will

Explain/demonstrate where PS Forms 3849 are stored locally.

Future Associate will  
Repeat demonstration.

---

**How tested:** \_\_\_\_\_ Role-play      \_\_\_\_\_ Customer

Date: \_\_\_\_\_

# Training Worksheet

## Lesson #28

---

### Task:

Delivering Postage Due or Business Reply Mail

---

Terminal Objective: review with future Associate

How to Deliver Postage Due or Business Reply Mail

---

### Prerequisites:

\_\_\_\_\_ Sales and Services Associate Training

\_\_\_\_\_ Review **GIST**

\_\_\_\_\_ Review *Domestic Mail Manual*

\_\_\_\_\_ Review *Postal Operations Manual*

---

### Supplies and Equipment Needed for This Training Session:

\_\_\_\_\_ PS Form 3849

\_\_\_\_\_ PS Form 1096

\_\_\_\_\_ Customer (role-play)

\_\_\_\_\_ Pen/pencil

\_\_\_\_\_ Retail Equipment

---

# Training Worksheet

Task: Delivering Postage Due or Business Reply Mail

---

\_\_\_\_\_ 1. RC will

Demonstrate professional greeting technique (**GIST**).

Future Associate will  
Repeat demonstration.

---

\_\_\_\_\_ 2. RC will

Demonstrate how to ask clarifying questions to determine customer needs (**GIST**).

Future Associate will  
Repeat demonstration.

---

\_\_\_\_\_ 3. RC will

Explain how to obtain PS Form 3849 from customer and retrieve article. Follow security procedures for securing cash drawer.

Future Associate will  
State how to obtain PS Form 3849 from customer and retrieving article.

---

\_\_\_\_\_ 4. RC will (ON IRT)

Explain collecting fees from customer and processing on Retail Equipment.

Future Associate will  
Repeat demonstration.

---

\_\_\_\_\_ 5. RC will

Explain value sell technique (**GIST**).

Future Associate will  
Explain value sell.

---

\_\_\_\_\_ 6. RC will

Explain customer payment options and process payment (**GIST**).

Future Associate will  
State customer payment options and process payment.

---

\_\_\_\_\_ 7. RC will

Explain closing professionally (**GIST**).

Future Associate will  
Demonstrate professional closing.

---

# Training Worksheet

Task: Delivering Postage Due or Business Reply Mail

---

\_\_\_\_\_ 8. RC will

Future Associate will

---

\_\_\_\_\_ 9. RC will

Future Associate will

---

\_\_\_\_\_ 10. RC will

Future Associate will

---

**How tested:**

\_\_\_\_\_ Role-play

\_\_\_\_\_ Customer

Date: \_\_\_\_\_



# Training Worksheet

## Lesson #29

---

Task:  
Delivering Domestic Insured Mail

---

Terminal Objective: review with future Associate  
How to Deliver an Insured Article

---

Prerequisites:  
\_\_\_\_\_ Sales and Services Retail Training Program  
\_\_\_\_\_ Review **GIST**  
\_\_\_\_\_ Review *Domestic Mail Manual*  
\_\_\_\_\_ Review *Postal Operations Manual*

---

Supplies and Equipment Needed for This Training Session:  
\_\_\_\_\_ Customer (for role-play)  
\_\_\_\_\_ Round date stamp  
\_\_\_\_\_ PS Form 3849  
\_\_\_\_\_ Pen/pencil  
\_\_\_\_\_ Retail Equipment

---

# Training Worksheet

Task: Delivering Domestic Insured Mail

---

\_\_\_\_\_ 1. RC will

Demonstrate professional greeting technique (**GIST**).

Future Associate will  
Repeat demonstration.

---

\_\_\_\_\_ 2. RC will

Explain obtaining PS Form 3849 from customer, reviewing form, and requesting identification. If customer has no PS Form 3849, inquire and review identification (**GIST**).

Future Associate will  
Repeat demonstration.

---

\_\_\_\_\_ 3. RC will

Explain retrieving parcel in unit securing cash drawer and equipment.

Future Associate will  
Secure equipment and cash drawer, then retrieve parcel in unit.

---

\_\_\_\_\_ 4. RC will

Explain reviewing parcel condition for any damage. Annotate on PS 3849.

Future Associate will  
State reviewing article for damage.

---

\_\_\_\_\_ 5. RC will

Demonstrate where customer signs PS Forms 3849 and 3811(if needed). Explain the use of the non-revenue transaction key on retail equipment. Scan for signature capture, as needed.

Future Associate will  
Repeat demonstration.

---

\_\_\_\_\_ 6. RC will

Show how clerk completes USPS blocks on forms and then hands customer the item. If customer makes purchase, explain customer payment options and process payment (**GIST**).

Future Associate will  
Demonstrate where customer signs for article. State customer payment options and process payment.

---

\_\_\_\_\_ 7. RC will

If applicable, explain procedure of how to deal with customer if item is damaged.

Future Associate will  
Repeat demonstration.

---

## Training Worksheet

Task: Delivering Domestic Insured Mail

---

\_\_\_\_\_ 8. RC will

Explain value sell techniques (**GIST**).

Future Associate will  
Demonstrate value sell.

---

\_\_\_\_\_ 9. RC will

Explain closing professionally (**GIST**).

Future Associate will  
Demonstrate professional closing.

---

\_\_\_\_\_ 10. RC will

Explain/demonstrate how and where to file PS Forms 3849 locally.

Future Associate will  
Repeat demonstration.

---

**How tested:** \_\_\_\_\_ Role-play                      \_\_\_\_\_ Customer

Date: \_\_\_\_\_

# Training Worksheet

## Lesson #30

---

### Task:

Delivering Collect-On-Delivery (COD) Articles

---

Terminal Objective: review with future Associate  
How to Deliver a Collect on Delivery (COD) Article

---

### Prerequisites:

- \_\_\_\_\_ Sales and Services Retail Training Program
  - \_\_\_\_\_ Review **GIST**
  - \_\_\_\_\_ Review *Domestic Mail Manual*
  - \_\_\_\_\_ Review *Postal Operations Manual*
- 

### Supplies and Equipment Needed for This Training Session:

- \_\_\_\_\_ Retail Equipment
  - \_\_\_\_\_ PS Form 3816
  - \_\_\_\_\_ PS Form 3849
  - \_\_\_\_\_ Customer (role-play)
  - \_\_\_\_\_ Pen/pencil
-

# Training Worksheet

Task: Delivering Collect-On-Delivery (COD) Articles

---

\_\_\_\_\_ 1. RC will

Demonstrate professional greeting technique (**GIST**).

Future Associate will  
Repeat demonstration.

---

\_\_\_\_\_ 2. RC will

Explain obtaining customer's PS Form 3849, reviewing form, and requesting identification. If customer has no PS Form 3849, inquire and review identification (**GIST**).

Future Associate will  
Repeat demonstration.

---

\_\_\_\_\_ 3. RC will

Using security procedures, explain where to retrieve item and how to verify you have the correct article.

Future Associate will  
Demonstrate retrieving item and state review.

---

\_\_\_\_\_ 4. RC will

Explain maintaining control of article until fees have been collected.

Future Associate will  
State maintaining control of item.

---

\_\_\_\_\_ 5. RC will

Explain payment options and collect fees. Also check item for return receipt. Use retail equipment to complete transaction.

Future Associate will  
Repeat demonstration.

---

\_\_\_\_\_ 6. RC will

Explain how to complete COD forms, including scanning for signature capture, as needed.

Future Associate will  
Repeat demonstration.

---

\_\_\_\_\_ 7. RC will

Explain value sell technique (**GIST**).

Future Associate will  
Demonstrate value sell.

---

# Training Worksheet

Task: Delivering Collect-On-Delivery (COD) Articles

---

\_\_\_\_\_ 8. RC will

Explain customer payment options and process payment, if customer makes additional purchase (no credit card for COD payment) (**GIST**).

Future Associate will  
State customer payment options and process payment.

---

\_\_\_\_\_ 9. RC will

Explain closing professionally (**GIST**).

Future Associate will  
Demonstrate professional closing.

---

\_\_\_\_\_ 10. RC will

Explain trust procedures of handling fees collected. Explain remitting according to local policy and filing forms.

Future Associate will  
Repeat demonstration.

---

**How tested:**

\_\_\_\_\_ Role-play

\_\_\_\_\_ Customer

Date: \_\_\_\_\_

# Training Worksheet

## Lesson #31

---

### Task:

Dispatching Registered Mail to the Processing and Distribution Center

---

Terminal Objective: review with future Associate

How to Dispatch Registered Mail to the Processing and Distribution Center

---

### Prerequisites:

\_\_\_\_\_ Sales and Services Associate Training Course

\_\_\_\_\_ Review *Postal Operations Manual*

\_\_\_\_\_ DM-901

---

### Supplies and Equipment Needed for This Training Session:

\_\_\_\_\_ Registry Equipment (seals, carbon paper, locks)

\_\_\_\_\_ PS Form 3854 \_\_\_\_\_ Pen/pencil

\_\_\_\_\_ Dispatch equipment

\_\_\_\_\_ Round date stamp

\_\_\_\_\_ Register control card

---

# Training Worksheet

Task: Dispatching Registered Mail to the Processing and Distribution Center

---

\_\_\_\_\_ 1. RC will

Explain/demonstrate all the necessary forms and equipment needed and the location of where to find items in unit.

Future Associate will

Collect all required forms and equipment and explain their use.

---

\_\_\_\_\_ 2. RC will

Explain all entries of dispatch forms.

Future Associate will

Complete all entries on forms.

---

\_\_\_\_\_ 3. RC will

Show where to locate article numbers on PS Form 3854 and verify.

Future Associate will

Explain where to locate article numbers and verify.

---

\_\_\_\_\_ 4. RC will

Explain closeout of PS Form 3854.

Future Associate will

Close out form.

---

\_\_\_\_\_ 5. RC will

Review district operating procedures (SOP) and complete required forms if necessary.

Future Associate will

Review SOP and complete additional forms if required.

---

\_\_\_\_\_ 6. RC will

Demonstrate proper procedure for sealing and securing register equipment.

Future Associate will

Repeat demonstration.

---

\_\_\_\_\_ 7. RC will

Explain how to dispatch item to designated employee.

Future Associate will

State how to dispatch to designated employee.

---



# Training Worksheet

Task: Dispatching Registered Mail to the Processing and Distribution Center

---

\_\_\_\_\_ 8. RC will

Future Associate will

---

\_\_\_\_\_ 9. RC will

Future Associate will

---

\_\_\_\_\_ 10. RC will

Future Associate will

---

**How tested:**

\_\_\_\_\_ Role-play

\_\_\_\_\_ Customer

Date: \_\_\_\_\_

# Training Worksheet

## Lesson #32

---

**Task:**

Working With the *Express Mail Network Directory*

---

Terminal Objective: review with future Associate

How to Determine the Service Commitment for Domestic Express Mail using Directory

---

**Prerequisites:**

\_\_\_\_\_ Sales and Services Retail Training Program

\_\_\_\_\_ Review **GIST**

---

**Supplies and Equipment Needed for This Training Session:**

\_\_\_\_\_ Current *Express Mail Network Directory*

\_\_\_\_\_ Pen/pencil

\_\_\_\_\_ Retail Equipment

\_\_\_\_\_ *ZIP Code Directory*

\_\_\_\_\_ Scale/Ratefold

\_\_\_\_\_ Label 11A or 11B

\_\_\_\_\_ *Postal Bulletin*

---

**Note to all RCs teaching this session:**

Training steps that are specific to clarifying questions to be asked of customer must include pertinent information on any or all of the following:

- **HAZMAT**
  - **Aviation Security**
  - **Target Mail**
-

# Training Worksheet

Task: Working With the *Express Mail Network Directory*

---

\_\_\_\_\_ 1. RC will

Demonstrate professional greeting technique (**GIST**).

Future Associate will  
Repeat demonstration.

---

\_\_\_\_\_ 2. RC will

Demonstrate how to ask clarifying questions to determine customer needs (**GIST**).

Future Associate will  
Repeat demonstration.

---

\_\_\_\_\_ 3. RC will

Demonstrate retrieving *ZIP Code Directory* and using it to obtain customer's ZIP Code of destination (**GIST**).

Future Associate will  
Repeat demonstration.

---

\_\_\_\_\_ 4. RC will

Explain a.m./p.m. next day or second day service utilizing your *Express Mail Network Directory*.

Future Associate will  
State purpose of a.m./p.m. next day or second day service.

---

\_\_\_\_\_ 5. RC will

Explain giving customer correct information (**GIST**).

Future Associate will  
Give customer correct information.

---

\_\_\_\_\_ 6. RC will

Explain value sell technique (**GIST**).

Future Associate will  
Demonstrate value sell.

---

\_\_\_\_\_ 7. RC will

Explain customer payment options and process payment (**GIST**).

Future Associate will  
State customer payment options and process payment.

---

# Training Worksheet

Task: Working With the Express Mail Network Directory

---

\_\_\_\_\_ 8. RC will

Explain closing professionally (**GIST**).

Future Associate will  
Demonstrate professional closing.

---

\_\_\_\_\_ 9. RC will

Return directory to proper location, if applicable.

Future Associate will  
Repeat demonstration.

---

\_\_\_\_\_ 10. RC will

Future Associate will

---

**How tested:**

\_\_\_\_\_ Role-play

\_\_\_\_\_ Customer

Date: \_\_\_\_\_

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## **Appendix B: Retail Customized Materials for Structured On-the-Job Training Course #23501- 00 or #23501- 01, Participant's Guide**

The Retail Sales and Services Associates Training program requires successful completion of the course #23501-00 or #23501-01 (Structured On-the-Job Training.) The materials in this appendix are customized to meet the retail requirements for structured on-the-job training. These materials replace the generic structured on-the-job training course materials for Module 4 of the Participant's Guide.

1. Module 4R: Preparation and Delivery of Structured On-the-Job Training for Retail - Sales and Services Associates Training. This module replaces Module 4 in the Participant's Guide.

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**Module 4R: Preparation and Delivery of Structured On-the-Job Training for Retail - Sales and Services Associates Training**  
(Allotted time: 235 minutes)

**Learning Objectives:**

Upon completing this module participants will be able to:

1. Perform a task or process breakdown.
2. Complete a structured OJT lesson plan.
3. Prepare basic job aids.
4. Deliver a structured OJT lesson plan using at least one job aid and completing the required training tracking forms (SOJT lesson plan, PS Forms 2548 and 2432).

**Module Overview:**

This module provides you with basic guidelines for the successful implementation of SOJT through planning, preparation of structured lesson plans and job aids to facilitate learning. This module is divided into three parts:

- Preparing for SOJT
- Practicum for delivering SOJT
- Module recap

**Preparing for SOJT:**

During the earlier discussion on “Benefits of SOJT,” (Module 2) we reviewed the importance of the OJI/retail coach – SOJT coordinator relationship and the need to work collaboratively in order to effectively implement structured on-the-job-training. Ultimately, we must accept the fact that we cannot plan for training in isolation.

Our cooperation and collaborative efforts will help us meet the organizational goal of having the right people, in the right place, with the right tools, at the right time to consistently provide superior customer value.

We must also recognize the importance of coordinating our efforts with the PEDCs, to ensure that tracking of the training and training records is kept current.

In addition, we must also be aware of the following considerations that will support our efforts:



- Keep it simple. The USPS has many complex systems. SOJT must be seamlessly integrated into these systems to avoid unnecessary work. The work related to SOJT implementation must add value to our systems. Training that is both effective and efficient adds value in terms of reduced errors and the costs associated with poor work quality.
- SOJT must be user friendly and easy to manage. Keeping the training simple in terms of both process and content will help foster its acceptance.
- The SOJT must be compatible with existing USPS training and tracking documentation systems. Such compatibility facilitates acceptance.
- SOJT must focus on critical competencies because these are correlated with critical core processes, which are those required in the organization's daily operations that affect every piece of mail.
- Critical competencies and their respective core processes must comprise the building blocks of an SOJT learning/training matrix.
- When we adhere to an instructional method that facilitates the capturing of best practices, we add value to the critical core processes through effective and efficient training. Therefore, effective SOJT is process-driven, yet learner-centered.
- The SOJT must allow for multiple instructional strategies to accommodate diversity in people's learning styles and needs.
- Learning must be verifiable (best practices must be captured in a structured lesson plan to ensure consistency in instruction) and certifiable (to ensure that the technical process reflects the best practices).

**Notes:**

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**Using the Retail Training Worksheets**

Follow the guidelines below when using the retail SOJT lesson plan.

- Introduction. Hello, my name is \_\_\_\_\_. I am your retail coach.

- c. The task we are going to work on today is (read from task name).
- d. By the end of this session, you will be able to (read from terminal objective).
- e. The prerequisites for performing this task are that you have already taken the Sales and Service Retail Training Program. In addition, I'd like to review **GIST** with you before we begin. Briefly, review "Greet, Inquire, Suggest and Thank."
- f. If the training is done with a customer, check off "Customer" under "How Tested?" If training is done by having the OJI/retail coach role-play the part of a customer, check off "Role Play with OJI/retail coach."
- g. For training purposes, review each step of the Training Worksheet by showing and telling the things listed under "OJI/retail coach will" and having the trainee repeat the demonstration by doing the things listed under "Trainee will." Do this for all steps listed (up to 10 for each process).
- h. For certification, either with trainer acting as customer or with a real customer, have the trainee demonstrate the tasks listed. Check off the steps that were completed correctly by the trainee. If the trainee misses a step and a customer is present, remind him/her of the step and have him/her complete the task starting at the error. After the customer leaves, have the trainee go through the entire task and check off the steps that were completed correctly. If the trainee misses a step and a role-play is being used, have the trainee complete the entire task again. If the trainee misses the step twice, this should be recorded by placing an X next to the step.
- i. At the end of the form, indicate the number of steps completed correctly by counting the number of check marks and placing the number in the space for "completed steps." Indicate the number of steps either completed incorrectly or not completed by counting the number of Xs and placing the number in the space for "uncompleted steps."
- j. Date and sign the document.
- k. Indicate the estimated training time for the task. This should include the showing and telling as well as the repeated demonstration by the trainee.

- l. The scoring system involves scoring the OJI/retail coach portion of the exam separately from the computer-administered portion. The computer-administered exam is scored such that a passing score is 80 percent correct (40 out of 50 items correct). The retail coach portion is scored such that the examinee has to get 70 percent of the processes answered correctly. Any given process is “correct” if the examinee successfully completes 80 percent of the steps in the lesson plan. This is different from the current compensatory system in which a high score on the OJT can offset a low score on the computerized exam.
  
- m. The task/process analysis or breakdown provides a step-by-step description of all of the observable, measurable and attainable performance elements that make up a task or process. The task or process has well-defined start (input) and end (output) parameters. In SOJT it is important to clarify expectations in performing the steps of the task/process competently. It is recommended that the lesson plan not exceed ten steps so as to ensure that the learner will be successful in achieving the desired competency level of performance without feeling overwhelmed by a lot of new information.

 **Create an SOJT Lesson Plan Using a Snowflake Activity**

This activity is designed to give you some experience in developing and using the SOJT lesson plan. It also addresses basic concepts underlying best practices.

**Notes:**

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 **Developing a Job Aid Activity**

The purpose of this activity is to provide you with an opportunity to develop a basic job aid for a specified SOJT lesson plan.

**Notes:**

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## **Practicum on Delivering SOJT**

In this section you will have the opportunity to apply the basic strategies and method for structured OJT using assigned retail work processes.

The three retail processes are noted below.

- a. Selling and accepting a Registered Mail COD article
- b. Selling and processing Global Priority Mail
- c. Hand-to-hand exchange of Registered Mail

You will develop and deliver an SOJT lesson plan based on your assigned retail process. At least one job aid and the appropriate Postal Service training tracking forms must accompany your lesson plan.

**Notes:**

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## **OJI/Retail Coach Certification Overview**

In this section you will review the evaluation statements noted in the Field Master Trainer/OJI (retail coach) Certification Scale included in the Toolkit. Review each statement, and be prepared to discuss the relevancy of each to the topics covered in this course; i.e., adult learning theory, learning styles, constructive feedback and the SOJT 8-step method.

**Notes:**

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## **Module Recap**

This activity provides you with a structured approach to reflect on the content (i.e., knowledge and skills) and process (i.e., instructional methods) covered in the module. It allows for a review of the learning objectives and facilitates learning consolidation by personalizing the learning experience. It promotes collaborative learning and teaming among participants through the use of small and large group participation.

Follow the facilitator's instructions for this activity. The chart below illustrates how your group should record its observations.

<b>Learner's View</b>	<b>Trainer's View</b>
<p>On this side of the rip chart record the group's observations/reactions to the content of this module from a learner's point of view. For example, ask:</p> <ul style="list-style-type: none"><li>• What were some of the key points?</li><li>• What new terms did we learn?</li><li>• What new knowledge and/or skills did we learn?</li><li>• How are the key points in this module linked to my prior learning experience and/or the key points of previous modules?</li></ul>	<p>On this side of the rip chart record the group's observations/reactions to the content of this module from a trainer's point of view. For example ask:</p> <ul style="list-style-type: none"><li>• What instructional techniques or methods were used?</li><li>• Was constructive feedback used effectively?</li><li>• Was everyone engaged in the learning process?</li></ul>

**Notes:**

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