



# Lobby Assistance

On **the** Job Training Guide

**Course #10021912**

**PSN 7610170000138**

**April 2013**

Employee Resource Management





# **Lobby Assistance**

## **On Job Training Guide**

United States Postal Service  
Employee Resource Management  
475 L'Enfant Plaza SW  
Washington, DC 20260-4215

## **Use of Training Materials**

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

Copyright 2013 by the United States Postal Service, Washington DC 20260-4215

All rights reserved.

No part of this publication may be reproduced in any form or by any means without permission, in writing, from Employee Resource Management.

Certain parts of this publication may contain copyrighted materials from other sources the reproduction of which for this specific training use has been interpreted not to exceed the fair use clause of the copyright regulation (Ref. 371.5 ASM).

## **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 of 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. Instructors and class participants are expected to support this commitment.

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

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

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

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



## Preface

The Lobby Assistance, On-the-Job Training (OJT) course was designed to provide trainers with guidelines and resources to be used for a hands-on training approach. The trainer is not restricted to the time allotted and should spend time with the trainee to ensure complete comprehension of responsibilities and tasks. This OJT is used to acquaint employees with their positions, to acquire knowledge and skills related to changes in work processes, and to implement refresher training. Trainers are encouraged to follow the guideline provided and review the Lobby Assistance OJT Checklist with the trainee at the end of training.

The Lobby Assistance **On-the-Job** training is not to be performed on overtime. Any exceptions must be approved by the appropriate manager or supervisor.



## Lobby Assistance Overview

The role of the Lobby Assistant goes beyond that of just meeting and greeting customers as they enter the lobby. It extends to gathering information and providing recommendations that match products and services to the mailing needs of customers.

**Offices should use the Lead Sales and Service Associate in the lobby as the primary to provide lobby assistance during the hours that the retail window is open. If the Lead Sales Associate is not available or does not exist in the unit then any available Sales and Service Associate can and should be used. It is recommended that all clerks with Sales and Service Associate duties should be trained and understand the roles and responsibilities of the Lobby Assistant.**

There may be times when the line does not allow the Lobby Assistant to approach all customers if they are assisting another. There may also be down times when no one comes in for a few moments. Ultimately, the goal is to try to approach *customers to determine their needs*.

Lobby Assistant should be positioned in the lobby, approaching customers and assisting with determining which queue line, product or service would best meet their needs for quick, convenient service.

While a pleasant greeting is necessary, it is not the sole purpose of a Lobby Assistant to be a 'greeter' - assistance is the primary goal. Although the Lobby Assistant is not behind the counter with a POS terminal, their postal knowledge is what makes their assistance so critical and valuable.

Lobby Assistants should be evaluating each customer's needs before they get in the queue line, if possible, to determine if they can be moved to the self-service kiosk or if they are fully prepared to conduct their retail transaction.

Some suggested duties that Lobby Assistants can engage in during down times might include; straightening the lobby, replenishing ReadyPost/EPS supplies and forms as well as ensuring the functionality of the SSK(s) by carrying out such activities as restocking supplies, clearing alerts and performing basic cleaning when no customers are being assisted. ~~maintaining the functionality of the SSK(s).~~

'Tool kits' should be used in order to have forms, supplies and applications readily available to quickly supply the customers

If using a vest, ensure name badge is visible.

## Tool Kit

Below are lists of suggested items to include in the Lobby Assistant tool kit.

### Forms:

- Signature Confirmation (PS 153)
- Insurance (Domestic \$200 or less)
- Insurance (Domestic over \$200-Blue)
- Certified Receipt (PS 3800)
- Return Receipt (PS 3811)
- Customs (PS 2976)
- Customs Declaration and Dispatch Note (PS 2976-A)
- **Priority Mail Express (Label 11)**
- Change of Address (PS 3575) (if requested by customer)
- Official Change/Correction to Mail Forwarding (PS 3546)

### Shipping Supplies:

- **Priority Mail Express** and Priority Mail Envelopes
- Priority Mail Small Box
- Stamped Envelopes
- ReadyPost Envelopes
- ReadyPost Tape for Sale

### Applications:

- Passport Application (DS 11, DS 82)
- P.O. Box Application (PS 1093)

### Miscellaneous:

- Shipping International Packages (Pub 613)
- HAZ/MAT Information (Notice 107)
- Price List (Notice 123)
- Priority Mail Stickers
- Priority Mail Address Labels
- Pencil, Pens, Highlighter

- Tape
- Tape measure
- Post It Notepad
- Scanner
- Walkie Talkie (if applicable)
- Language Translator Guides
- **Vests** (if applicable)
- List of Alternative Access sites in the community with extended hours

## Preparing Customers

The trainer should discuss with the Lobby Assistant the ways to prepare customers for their retail transaction. Lobby Assistants should be asking questions to determine the needs of the customer. This will allow them to prepare their transactions in order to reduce the time spent at the counter.

For packages or mailings:

- Direct to SSK if eligible
- Make sure the packages are addressed completely and packaged properly
- Ask the required questions for the RCE survey to determine product needs
- Explain any product and service features
- Always ask the HAZMAT question and mark the package with initials in the corner so Sales and Services Associates at the counter know the customer has been asked
- Explain any required forms and have the customer complete prior to reaching the counter
- Carry a tape measure and measure any large packages. Record the size dimensions on the package in the postage corner for the SSA to input into POS
- ~~Customs transactions should be directed to the Customs Terminal (if applicable). Otherwise, explain customs forms and have customer complete or handle according to local process~~

All SSAs should be aware of the Lobby Assistant's process of initialing packages when the HAZMAT question was asked and look for dimensions for large packages.

For other non-mailing transactions, steps can be taken to prepare the customer prior to reaching the counter.

Some examples:

- Answer any questions or inquiries
- Pick-ups or Hold Mail should be handled according to local procedures to reduce Sales and Service Associates' (SSA) time away from the counter
  - Direct customer to a Dutch door while the item is retrieved
  - Carry a hand-held scanner to scan accountable pick-ups
  - Inquire of all customers in the lobby to see if anyone else has a pick-up to reduce multiple trips to retrieve items
- For new PO Box rentals, explain PO Box fees and key policies, have customer complete application, check identification
- If the customer is writing a check, the lobby assistant can validate the customer's Identification
- For passport requests, explain the process and documentation needed and have the customer complete the application
- Stamps customers could be educated on the types of stamps and alternate locations for purchasing stamps such as consignment locations, partner locations or online

## **Lobby Assistance for Self-Service Kiosk Sites**

For sites that have a Self-Service Kiosk, the Servicing Employee training is recommended for all Lobby Assistants. Contact your Area Retail Equipment Coordinator if you need a copy of the training material.

Trainers should ensure that Lobby Assistants are familiar with the functionality of the SSKs in order to be able to identify eligible transactions. Trainer should review SSK Functionality located at the end of this guide. This guide can be printed and kept in the Lobby Assistant's tool kit for quick reference.

Before directing customers to the Self-Service kiosk, the Lobby Assistant will need to ask questions to determine if the transaction can be performed at the SSK.

- Ask if the customer has a credit or debit card that they can use for the purchase
- If the customer has packages, ask if they are domestic
- If the customer does not have anything in their hands, ask if they are purchasing stamps and if so, query on the quantity.
- If they have a PO Box renewal letter advise them that they can renew on the self-service kiosk

If the transaction qualifies for self-service, the Lobby Assistant should direct the customers to the kiosk. Mention the benefits of using the kiosk.

- Will minimize their time at the post office
- Eliminate or reduce time spent in line
- Provides English and Spanish language options
- Provides a receipt with information regarding their transaction including tracking numbers
- Lobby Assistant is available to provide help or answer questions, if needed

Ensure that the Lobby Assistant can show the customer:

- Where the retail items are scanned on the Self Service Kiosk
- Where their Credit/Debit card is swiped
- Where the postage labels are dispensed
- Where the large mailing labels (SSL –Standard Shipping labels) are dispensed
- Where the customer receipt is dispensed
- Where to deposit their packages and other mail prepared on the SSK (In Wall collection box, Free Standing collection box or Boise parcel slide)

## On-the-Job Instructions

Prior to the On the Job instructions, the Sales and Service Associate (SSA) should take **either the Classroom or eLearning version of Performing Lobby Assistance Course**. Contact your District Retail office with questions ~~for training module~~, if necessary.

When instructing employees how to offer effective lobby assistance, a trainer should show by example in a live lobby environment. The trainer should demonstrate how to effectively approach and query customers while the SSA observes, then shadow them as they perform the duties. Average time spent with each employee will be about an hour but this may depend on customer traffic.

During the On the Job Instruction, the District Trainer (or designee) will **train the LSSA, who is responsible for training the SSAs in offices where there is a LSSA:**

1. Briefly explain the responsibilities and goals of the Lobby Assistant duties
2. Take the Lobby Assistant through 2-3 SSK transactions to familiarize with the customer screens (if applicable)
3. Show the Lobby Assistant how to replenish consumables and clear alerts (if applicable)
4. During OJT Instructions, trainer should serve as a lobby assistant in the live lobby environment with the trainee observing in order to demonstrate greeting and inquiring techniques
5. Shadow the trainee for several transactions until they are able to effectively triage customers
6. Answer any questions

Lobby Assistants should be able to:

- Confidently approach customers when they arrive in the inner lobby
- Have a pleasant greeting and inquiry method
- Prepare customers for the full service counter
- Utilize slow periods for lobby product replenishment
- Identify SSK–eligible transactions (if applicable)
- Be able to direct customers to the SSK or full service counter (if applicable)
- Be able to clear alerts and replenish consumables



Trainer should review expectations of the lobby assistance duties with the SSA.

## **Expectations**

### **GIST:**

- Pleasantly greet customers as they enter the lobby
- Query customers to determine needs
- Suggest products or services to meet needs
- Thank the customer

### **Prepare for Transaction:**

- Evaluate customers to prepare for retail counter
- Explain products and services
- Offer forms and applications for services and assist with completion
- Handle Mail-Pickups and Hold Mail according to local procedures
- Direct customs transactions to customs terminal or handle according to local procedures
- Identify oversized packages for DIM and Balloon rates
- Ask the HAZMAT question
- Answer general customer questions

### **SSK:**

- Identify Self-Service Kiosk (SSK) eligible transactions
- Be familiar with the SSK functionalities
- Be able to direct customers to the SSK
- Be able to clear alerts and perform basic cleaning
- Be able to replenish supplies

### **Suggested Ancillary Duties:**

- Replenishment of supplies – ReadyPost, forms, greeting cards
- Stock EPS (**Priority Mail Express, Priority**) displays
- Straighten displays and slatwall
- General tidying

## Self-Service Kiosk Functionality

- Weighs and prices letters, large envelopes and packages up to 70 pounds
- Purchase Forever Stamps – choice of 6 Black and White designs through Print on Demand (POD). May purchase 1 to 100 with a minimum purchase of \$1.00
- Purchase postage stamps of variable rates through Print On Demand (POD)
- Purchase postage for **Priority Mail Express**, Priority Mail, First Class Mail and Parcel Post to ship letters, flats and domestic packages
- PO Box renewal
- Obtain information on prices, ZIP Code look up and mailing information
- Provides Track and Confirm look up
- Purchase Special Services including Insurance and Certified Mail
- May scan and purchase ReadyPost packaging, greeting cards, and other retail merchandise if the SSK has a scanner
- Send international correspondence up to 13 ounces
- Provides English and Spanish language options
- A headset jack and volume control buttons are provided for customers to insert their headphones and listen to audio directions on using the kiosk.
- Easy access keypad provided for visually impaired customer. When using the EZ Access keypad, the selected item is highlighted in red.
- Provides a receipt with information regarding their transaction including tracking numbers

Items that cannot be shipped on the self-service kiosk include:

- Shipments to APO/FPO locations
- International merchandise and packages
- Media Mail
- Signature Confirmation
- Money Orders (Domestic & International)
- International Reply Coupons
- Registered Mail

## Lobby Assistance OJT Checklist

The purpose of the Lobby Assistance OJT Checklist is to allow Lobby Assistants to demonstrate their mastery over specific behaviors identified as important to the success of the position. The design of the checklist allows an observer to mark whether a particular task/skill was observed. The checklist is located on page 10-11 of this document. Note: Each checklist should be printed front-to-back using one page.

Use the following directions to complete the checklist:

### Demographic Information:

- Please fill in the demographic information regarding the employee's name, trainer's name, site, date, and time observation began and ended.

### Tasks/Skills:

- If the skill is not observed, leave the **OB** box blank
- If the skill is not applicable, mark the **N/A** box
- If the skill is observed, mark the **OB** box
- For each observed skill please add any additional comments you feel can help the Lobby Assistant in his/her development of the task/skill

### Overall Comments:

- Provide feedback regarding the Lobby Assistant position, observations on the form, missing observations or any other relevant information

## **Lobby Assistance OJT Checklist**

|                 |  |                   |  |
|-----------------|--|-------------------|--|
| <b>Employee</b> |  | <b>Date</b>       |  |
| <b>Trainer</b>  |  | <b>Start Time</b> |  |
| <b>Site</b>     |  | <b>End Time</b>   |  |

|  | OB | N/A | Comments |
|--|----|-----|----------|
| <b>Preparing to be a Lobby Assistant</b>   |    |     |          |
| Assembles 'tool kit' before opening of lobby.  |    |     |          |
| Ensures name badge is visible at all times.  |    |     |          |
| <b>GIST</b>  |    |     |          |
| Approaches customer when they first arrive in inner lobby.                           |    |     |          |
| Asks questions to determine customer needs.  |    |     |          |
| Offers appropriate products or services to the customer.                             |    |     |          |
| Thanks customer for their time.  |    |     |          |
| <b>Preparing Customers for Transactions</b>  |    |     |          |
| Offers and explains how to complete forms to the customer.                           |    |     |          |
| Understands the Mail Pickup and Hold Mail processes to assist the customer.          |    |     |          |
| Knows the local procedure(s) for completing Customs transactions.                    |    |     |          |
| Asks the HAZMAT question and initials the package.                                   |    |     |          |
| Measures and records dimensions on large packages.                                   |    |     |          |
| Explains P.O. Box fees and checks identification.                                    |    |     |          |
| Assists with Passport application and explains requirements.                         |    |     |          |
| Educates customers on stamps, products, and services available.                      |    |     |          |
| <b>Finalizing the Customer Experience</b>  |    |     |          |
| Inquires the customer regarding the need for additional product for future mailings. |    |     |          |
| Mentions the availability of after hour SSK's  |    |     |          |
| Provides other options to the customer such as CPUs, Click-n-Ship and usps.com.      |    |     |          |
| Thanks the customer.   |    |     |          |

## **Lobby Assistance OJT Checklist**

|                 |  |                   |  |
|-----------------|--|-------------------|--|
| <b>Employee</b> |  | <b>Date</b>       |  |
| <b>Trainer</b>  |  | <b>Start Time</b> |  |
| <b>Site</b>     |  | <b>End Time</b>   |  |

|  | OB | N/A | Comments |
|--|----|-----|----------|
| <b>SSK (if applicable)</b>   |    |     |          |
| Successfully identifies SSK components   |    |     |          |
| Successfully identifies visual/hearing impaired options  |    |     |          |
| Successfully identifies SSK eligible transactions  |    |     |          |
| Directs eligible transactions to the SSK.  |    |     |          |
| Demonstrates on the SSK  |    |     |          |
| Selling 3 Forever stamps.  |    |     |          |
| Selling Priority Mail with Insurance.  |    |     |          |
| Looking up a zip code.   |    |     |          |
| Renewing a P.O. Box.   |    |     |          |
| Shows the customer where to retrieve their stamps on the SSK.  |    |     |          |
| Identifies the receipt area on the SSK for the customer.   |    |     |          |
| Directs the customer to the parcel drop after the package transaction is completed.  |    |     |          |
| Understands method to clear alerts and contact help desk for issues  |    |     |          |
| Replaces receipt paper   |    |     |          |
| Replaces SSK postage labels  |    |     |          |
| <b>Suggested Ancillary Duties</b>  |    |     |          |
| Replenishes supplies such as ReadyPost, forms, greeting cards when no customers are being assisted.  |    |     |          |
| Stocks EPS ( <b>Priority Mail Express</b> , Priority) displays when no customers are being assisted.   |    |     |          |
| Straightens displays and slatwall when no customers are being assisted.  |    |     |          |
| Ensures the lobby is neat and clean when no customers are being assisted.  |    |     |          |
| Ensure the functionality of the SSK(s) by replenishing supplies, clearing alerts and performing basic cleaning when no customers are being assisted. |    |     |          |
| <b>Additional Comments:</b>  |    |     |          |