



**SALES AND SERVICE ASSOCIATE AND SUPERVISOR *UPDATED***  
**MYSTERY SHOPPER PROGRAM GUIDELINES**  
**FOR FISCAL YEAR 2008**

**WAIT TIME IN LINE (30 POINTS)**

1. How long was your wait in line? (minutes:seconds)\_\_\_\_\_

The actual amount of time the shopper waited in line – from the time they entered the line, not the lobby, until they are called to the window to initiate their transaction – will be documented here by the shopper.

**Was your wait in line:**

**5 Minutes or Less** (= 30 points)  YES  NO

The shopper will document a yes or no in this field. If the time is 5:00 minutes or less, the office will receive 30 points.

**5:01 – 6:00 Minutes** (= 15 points)  YES  NO

The shopper will document a yes or no in this field. If the time is between 5:01 minutes and 6:00 minutes, the office will receive 15 points.

**Greater than 6 Minutes** (= 0 points)  YES  NO

The shopper will document a yes or no in this field. If the time is greater than 6:00 minutes it is considered an operational opportunity for improvement and the office will receive 0 points.

2a. How many stations were there (includes all areas where a register is available)?

This data is not supplied by the shoppers. This information is provided by the USPS via the RDM Terminal Usage Report and is pre-filled by the contractor for the shopper. It reflects the number of total stations the office could possibly staff, including the cash wrap. The Terminal Usage Report is a report generated by actual transactions on the POS terminals and reflects all registers where mailing/stamp transactions have been paid with cash.

2b. What was the highest number of stations staffed from the time you entered the line until completion of your transaction?

This data is supplied by the shoppers. The shoppers are to note the highest number of stations that are staffed any time during the period from when the shopper enters the line until their transaction is completed. This includes passport lines, cash wrap lines or special windows, such as business lines. If an associate is working the window for just a short period, it is counted. Additionally, shoppers are not instructed to determine if a station is staffed by a retail associate. If any postal employee appears at a station and appears to be available to assist they are also counted.

2c. Were there any employees assisting customers in the lobby area or from behind the counter prior to customers reaching the counter?

YES  NO

The shopper will document a yes or no in this field. This could be a lobby director or any employee who attempts to assist customers in an effort to keep the lines moving. For example, an employee comes into the lobby area and asks all the customers if anyone is just there to pick up a package and then assists them in getting their package, taking them out of the regular line. Another example would be if an employee enters the lobby area and asks if there is anyone who just wants stamps and then assists them in using the vending equipment, again, taking them out of the regular line. A third example would be an employee who is helping customers with any self-service equipment (vending or automated postal center).

**3. When you entered the line, how many customers were in line ahead of you?**

The shopper will count the number of people ahead of them in line. It is possible one customer could have a "friend" or two with them, the shoppers are not required to determine who was an actual customer with transactions.

**3a. When you entered the line, how many customers appeared to be conducting transactions at the counter?**

The shopper will count the number of customers that appear to be conducting transactions at the counter.

Questions 2a-c and 3-3a are simply informational. The WTIL score will be derived from question 2. The other questions are intended to provide additional data to the office to help improve the customer experience.

**HAZMAT (10 POINTS)**

**4. Did the employee ask whether your parcel (item, article) contained anything fragile, liquid, perishable, or potentially hazardous? (=10 points)**

YES  NO

**4a. If no, which part(s) of the question did they miss? (Check all that apply)**

- Fragile  
 Liquid  
 Perishable  
 Hazardous

The shopper has been instructed to listen for all four components of this question. If the Retail Associate (RA) misses one or more of these four components, the shopper will document this as a no response and indicate which part(s) was missed.

**Suggestion:** It may be easier to state this to the customer (and have them understand why they are asking this question) in terms similar to "For safety purposes, I am asked to find out if there is anything fragile, liquid, perishable, or potentially hazardous in your package."

**NOTE:** This question must be asked when accepting any article for mailing that must be weighed and has been presented as a parcel or a bulky mailing or flat. The RA should also be inspecting the package to ensure there is nothing suspicious such as leaking, protruding wires, etc. If a package is already marked "fragile," "liquid," "perishable," or "hazardous," the associate is still required to ask the question. The item needs to be identified in order to determine if it can be accepted. When in doubt, ask! This question may be asked in any order. The only requirement is that all four components are asked.

## SALES SKILLS (24 POINTS)

**5. Did the employee greet you pleasantly, make eye contact at the beginning of the transaction, and end the transaction in a pleasant manner? (= 2 points)**

YES  NO

The shopper will document this with a yes or no response. The associate must do all three things to receive credit for this question.

To allow the RAs to have their own personality shine through and not be robotic, instead of insisting on saying thank you, the RA may say something similar to "Have a great day" or "I appreciate your business", etc., in a pleasant manner and still receive credit for this question. While not required as the closing, it is still suggested that the RA always thank the customer for their business.

**5a. If Q. 5 is "NO," the shopper will document which part was missed.**

**6. Was the employee wearing the complete uniform? (= 2 points)**

The shopper will document this with a yes or no response.

**NOTE:** If a Postmaster in a Mystery Shop office works the window, it will be their responsibility to also wear the complete uniform if they are given a uniform allowance. If a Postmaster in a Mystery Shop office works the window and does not get a uniform allowance, it will be their responsibility to always wear a name AND title badge stating their name with the title of Postmaster, Officer-in-Charge or Postmaster Relief. If the employee has this badge, they will receive credit for a uniform.

If an employee is in training and is not wearing the uniform, there should be a professional sign to that effect at the counter or the employee should wear a name badge with the title "Trainee" on it. If these requirements are met, they will receive credit for a uniform.

Employees must wear a nametag, a security ID does not count as a nametag. Also, a nameplate with the employee's name on it does not count as a nametag.

**6a. If Q. 6 is "NO", the employee was not wearing:**

The shopper will document the item(s) missing from the uniform.

**7. Did the employee offer you a mail class?**

YES  NO

The employee will be expected to offer Express Mail or Priority Mail. To simplify the transaction and best educate the customer, the employee should state a feature of one of these mail classes at the time it is offered. For example the transaction may go as follows:

*"Would you like to send this Express Mail, our premium guaranteed service?" or "We have Priority Mail, which provides 2-3 day service."* Either of these would be acceptable and they may be asked as a question or made as a statement. The associate will also receive credit by simply offering Express and/or Priority Mail. On the other hand, an employee that simply says *"We have guaranteed service or 2-3 day service"* would not receive credit because they did not mention the specific name of the Express or Priority Mail class.

The employee may state the service standard as a feature or benefit of the class of mail. Again, the associate's goal is to educate the customer. To do so, the associate should offer the class of mail and the service standard or other feature at the same time so that the customer knows what they are purchasing at the time they are offered the class of mail.

**7a. Specify the class(es) of mail offered by the employee. (=6 points)**  
(Express OR Priority Mail must be offered to receive credit)

The shopper will document all classes of mail offered or state that none were offered, if that is the case.

**8. Did the employee offer any special service(s)?**

YES  NO

The shopper will document this with a yes or no response.

The RA's responsibility is to offer specific special services – *“How much insurance do you need?”* and *“Would you like to purchase Delivery Confirmation so that you can know when the item was delivered?”* are examples of questions the RA's may ask for the required service offerings. At a minimum, the RA must offer both Insurance and Delivery Confirmation. The RA is not required to recite an all-inclusive list, but simply a few examples of what we offer is acceptable.

**8a. Specify the special service(s) offered by the employee. (= 6 points)**

The shopper will document all special services offered. However, the associate will receive the 6 point credit only if **Insurance and Delivery Confirmation** OR **Insurance and Signature Confirmation** is included in the offering.

If any other special services are offered other than Insurance and Delivery Confirmation OR Insurance and Signature Confirmation, 1 point will be given.

Insurance and Delivery Confirmation or Insurance and Signature Confirmation – 6 points  
Other special services (not paired with Insurance and Delivery Confirmation or Insurance and Signature Confirmation) – 1 point

**NOTE:** The employee must offer Delivery Confirmation or Signature Confirmation by name. If the employee just offers confirmation or confirmation services, no points will be provided.

**Q8c. When you received the insurance form was it the '\$200 Under' form (black and white form)?**

YES  NO

**9. Did the employee suggest any additional items to purchase?**

YES  NO

The shopper will document this with a yes or no response.

**9a. Specify the additional item(s) offered by the employee.**  
(= 4 points)

In an effort to generate revenue, the RA must suggest an additional item. A suggestion would be to offer Stamps, Ready Post packaging supplies, passports, PO Box rental, philatelic items or ORLP Products. (This is not an all-inclusive list.) This may be something the customer may not have considered purchasing before, or it may be something they would purchase at another retail establishment.

**NOTE: Although the customer cannot purchase Click N Ship, credit will be given if it is offered. This is the ONLY product/service that cannot be purchased at the time of the transaction for which credit will be given.**

**10. Did the employee provide or offer a receipt without you having to ask for one? (= 2 points)**

YES  NO

The shopper will document this with a yes or no response. The RA's responsibility is to always offer a receipt without the customer having to ask for it.

**11. Was the employee attentive during the entire transaction? (=2 points)**

YES  NO

The shopper will document this with a yes or no response. Their response is based on what would normally be considered attentive service by an employee at any business location.

**NOTE:** Customer focus groups rated this as one of the most important attributes to customer satisfaction. Customers told us that they want the full attention of the RA. They don't want the RA talking on the telephone or talking and joking with other employees or customers while it is their turn at the counter. They want the RAs full attention all for themselves!

Shopper instructions will include a statement that if the employee helping the shopper is in training with another employee (employee's name badge must include "Trainee" on it and there is a sign up specifying the employee is in training, etc) the shopper will make an exception and answer this question "Yes." In addition, the shopper is instructed that if the employee is interrupted by another customer and is forced to speak with them, the shopper will make an exception and answer this question "Yes."

**11a. If Q. 11 is "NO", these problems were noted:**

The shopper will note the problem(s) with RA attentiveness to them while performing their transactions:

- On the phone
- Talking to other customer(s)
- Talking to other employee(s)
- Other distraction or interruption

**PRODUCT KNOWLEDGE (10 POINTS)**

**12. Did the employee explain any features of the class(es) of mail offered? (=5 points)**

YES  NO

The shopper will document this with a yes or no response.

The RA should explain a feature of a class of mail offered. The RA is only required to explain a feature of one class of mail to receive credit. Again, for simplicity the feature should be offered at the same time the class of mail. As examples, "*Would you like to send this Express Mail, our guaranteed service?*" or "*We have Priority Mail, which is 2-3 days.*" Either of these would be acceptable and they may be asked as a question or made as a statement.

**13a. Specify the special service(s) for which features were explained or offered.**

The employee has to offer to explain or explain the features of the special services. This can be for ANY special service that was offered. For example, an employee can state, "*Would you like me to explain Delivery Confirmation to you?*" or "*Do you know how Delivery Confirmation works?*" and receive credit for this question.

**13. Did the employee explain or offer to explain any features of the recommended extra service(s) offered?**

YES  NO

The shopper will document this with a yes or no response. The RA must explain a feature or benefit of **both** Insurance **and** Delivery Confirmation or offer to explain a feature or benefit of **both** Insurance **and** Delivery Confirmation to receive complete credit.

Suggestions:

*"May I recommend Insurance? Insurance protects against loss or damage. How about Delivery Confirmation? It will let you know when your item has been delivered."*

Or

*Our best value is Insurance and Delivery Confirmation. Insurance protects against loss or damage and Delivery Confirmation will confirm delivery either at usps.com or our 800 number.*

Or

*We can add Insurance and Delivery Confirmation. Would you like me to explain how these services work?*

While we have provided some examples, RAs should not feel constrained by these and may apply their own approach, but features and benefits for **both** Insurance **and** Delivery Confirmation must be explained or offered to be explained to receive full credit.

If the RA explains or offers to explain features of Insurance or Delivery Confirmation by themselves or in addition to some other special service, they will receive 2 points credit. If the RA explains or offers to explain features of any other special service offering, they will receive 1 point credit.

**NOTE: Quoting the price of a special service does not count as a feature or benefit.**

**13b. Please select the inquiry you asked the employee.**

- International Shipping
- Post Office Box Rental
- Dimensional Weight

Each quarter, the shopper will address one of the above areas during their shop. Each area will be rotated from shop to shop so that all three are not addressed in one shop.

**INTERNATIONAL SHIPPING**

**13c. When asked, did the employee offer the acceptable packaging options for International shipping.**

- Yes  
 No

For Priority Mail International and Express Mail International, customers can use same domestic packaging

**POST OFFICE BOX RENTAL**

**13d When you inquired regarding the benefits of having a Post Office Box, did the employee offer one of the acceptable responses?**

- Yes  
 No

Post Office Box and Caller service fees continue to be reasonable and an excellent value to our customers. The value to the customer include:

- Privacy
- Convenience
- Security
- Affordability
- Earlier Delivery
- 24 hour access to their mail (in 24 hour lobbies).

**DIMENSIONAL WEIGHT**

**13e. When asked, did the employee explain the price increase?**

- Yes  
 No

Explain to the customer that that dimensional weight pricing helps to ensure that postage accurately reflects transportation and operational costs when a package is large in size and takes up a lot of space. Our competitors also use similar pricing practices.

**13f. Did the retail associate offer packaging advice (i.e., switching to a smaller box, envelope or offering USPS provided packaging) for future mailings?**

- Yes  
 No

Always recommend and inform customers that switching to a smaller box or envelope or using USPS provided Priority Mail or Express Mail packaging will help to reduce their mailing costs.

**PROMOTION AND MERCHANDISING (26 POINTS)**

**14. Were you able to locate the form you were instructed to find in the lobby PRIOR to being served? (=2 points)**

- YES  NO

The shopper will document this with a yes or no response.

The Post Office responsibility, however delegated, will be to make sure that the special service forms are located in the lobby so they are easily found by customers and can be completed before reaching the window.

The shopper will evaluate whether they could locate the forms, not just if they were available. Retail units frequently indicate that the forms are available, but shoppers cannot find them. We should not require our customers to have to scour our lobbies to find forms. If the customer cannot locate it, then credit will not be given.

**15a. Were Ready Post retail packaging/shipping supplies prominently displayed? (=2 points)**

- Yes  
 No  
 There were either no Ready Post supplies or no complimentary Express/Priority Mail supplies displayed in the full-service lobby

The shopper will document this with a yes or no response.

The Post Office responsibility will be to make sure that the Ready Post packaging supplies are well stocked and professionally displayed according to the Retail Standardization initiative implemented in FY 06 (reference current Ready Post Guide). The Ready Post supplies should be displayed in the full service lobby so that they are easily noticeable to a customer that has entered the lobby and is heading toward the line.

**15b. Were Ready Post retail packaging/shipping supplies displayed such that a customer would notice them first, prior to the complimentary Express Mail or Priority Mail shipping supplies? (=2 points)**

- Yes  
 No  
 There were either no Ready Post supplies or no complimentary Express/Priority Mail supplies displayed in the full-service lobby

The shopper will document this with a yes or no response. This question is evaluated based on what the customer notices first when they approach the full service line. Both Ready Post and Complimentary supplies should be in the full service lobby.

The Post Office responsibility, however delegated, will be to make sure that Ready Post packaging supplies are well stocked and professionally displayed according to the Retail Standardization initiative implemented in FY06. Reference current Ready Post Guideline.

**NOTE:** In an effort to generate revenue, Ready Post packaging products must be highly visible to customers for purchase.

**16. Were complimentary expedited shipping supplies displayed (Express/Priority)? (=2 points)**

- YES  NO

The shopper will document this with a yes or no response. They will be evaluating both the full service and lobby areas for this question. For FY 2008, this question is now being scored.

**17. Were all signs and displays professional in appearance, including posting? (= 2 points)**

YES  NO

The shopper will document this with a yes or no response.

The Post Office responsibility, however delegated, will be to make sure that all signs and displays are professional in appearance, including posting. These items should not be worn or torn. Price labels should be visible. Signs/labels must not be handwritten, and should not be visibly taped.

**17a. If Q. 17 is "NO," these problems were noted:**

The shopper will document problems with signs and displays that were not professional in appearance and that were not professionally posted.

**17b. Please specify what signage or display(s) had problems.**

The shopper will record a description of the signage/display(s) and where it was located in the post office.

**18. Were ALL Continuity menu boards that were present in the office ONLY displayed side-by-side, directly above or behind the retail counter?**

**^2pts^**

- Yes  
 No  
 No Continuity menu boards were present

The shopper will document this as a yes or no. The Post Office responsibility, however delegated, will be to make sure that Point of Purchase menu boards are displayed according to the Retail Standardization initiative implemented in FY06. In order to get full credit, menu boards should not be placed anywhere else in the office other than above or behind the retail service counter.

Reference: Current drive period Signage Instruction Guide.

Properly placed POP (Point-of-Purchase) messaging will:

- Answer customer questions before they reach the counter.
- Increase sales by providing customers with information they need to make purchase decisions.

**18a. The shopper mark any of the following if Question 18a is "No"**

- Continuity menu boards not side-by-side  
 Continuity menu boards somewhere else in the office other than directly above or behind the retail counter  
 Other signage placed in between Continuity menu boards.

**18b. Were ALL Promotional Messaging menu boards that were present in the office ONLY displayed side-by-side, directly above or behind the retail counter?**

Yes

**^4pts^**

- No  
 No Promotional Messaging menu boards present.

**18c. The shopper mark any of the following if Question 18b is "No"**

- Promotional Messaging menu boards not side-by-side  
 Promotional Messaging menu boards somewhere else in the office other than directly above or behind the retail counter  
 Other signage placed in between Promotional Messaging menu boards.

**19. Were the Promotional Messaging menu boards for the current time period the ONLY ones displayed?**

- Yes  
 No  
 No Promotional Messaging menu boards present

<sup>^</sup>8/8 pts<sup>^</sup>

The Post Office responsibility, however delegated, will be to make sure that Point of Purchase promotional messaging is displayed according to the current drive period Signage Instruction Guide.

The Promotional messaging features products and services that offer the greatest opportunity to increase sales in your Post Office. The messaging of the POP uses an engaging theme that unveils the product benefits to specific target audience groups at a specific time. Promotional POP menu boards have a symbol in the lower right-hand corner which indicates when it is to be displayed. It is critical that all offices make sure they only have the current menu boards displayed. It doesn't make sense to have holiday messaging in the summer!

Send customers the right messages about our products and services. Encourage retail associates to understand the importance of signage, and how it grows revenue not only for the Postal Service™, but for your Post Office.

**20. Was the interior neat, clean and well maintained? (= 2 points)**

- YES  NO

The shopper will document this with a yes or no response.

Post Office responsibility, however delegated, will be to make sure that the interior of the building (countertops, floors, etc.) are free of trash, spills, dirt, graffiti, and that basic cleanliness is maintained on the interior of the facility.

There's no doubt that customers are sensitive to the appearance of the lobby every time they enter the Post Office. That's why it's important to make your lobby look as orderly and welcoming as possible. Customers are invited into the Post Office lobby every day. So as a manager, ask yourself: How does it look? Does it look neat? Do trash receptacles need to be emptied? Is there unnecessary clutter?

**20a. If Q. 20 is "NO", please explain why.**

**21. Was the exterior neat, clean and well maintained?**

- YES  NO

The shopper will document this with a yes or no response.

The Post Office responsibility, however delegated, will be to make sure that the exterior of the building is free of trash, spills, graffiti, taped signs on the doors, and that basic cleanliness and maintenance is maintained on the exterior of the facility.

NOTE: Although this question is not scored, the shopper will continue to document his/her reasoning for responding 'no' to this question in Q21. The expectation for the Post Office to maintain the exterior of the facility remains the same.

**21a. If Q. 21 is "NO", please explain why.**