

# Retail Employee Observation

Employee Name	Office Name	
Observer Name	ZIP Code®	
	Date	Time

On \_\_\_\_\_ you were observed by \_\_\_\_\_.

The customer you waited on mailed:

*(The product[s] or service[s] rendered are identified in blocks A. - E.)*

A.	B.	C.	D.	E.	Check marks show actions that were observed. Note: items 2 - 5.	
					1. Greet customer pleasantly.	
					2. Ask, "Does the parcel (item, article) contain anything liquid, fragile, perishable, or potentially hazardous?".	
					Only for letters or packages presented at time of mailing.	
						3. Ask "When do you want the item(s) to arrive?" OR offer Express Mail® or Priority Mail <b>and</b> state service standard.
						4. Recommend class of mail and explain features and benefits.
					5. Offer any special services.	
					6. Explain or offer to explain features of special services.	
					7. Suggest an additional item to purchase.	
					8. Attentive during entire transaction.	
					9. Provide receipt.	
					10. End transaction in pleasant manner.	

Observer's Comments

Observer's Signature	Observer's Title
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Supervisor's Action Taken

Supervisor's Signature	Date	Employee's Signature	Date
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## Instructions

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The purpose of an employee observation is to:

Record the level of employee's sales skills and product knowledge. It serves as a communication tool between management and the retail clerk/sales associate. Perform an employee observation at least once per month, per retail clerk. Observe interactions between the retail clerk and five consecutive customers. NOTE: Units not meeting targets should provide more frequent observations.

Management reviews results of the observation with the clerk within 24 hours.

- Compare the employee's performance with previous observations.
- Congratulate the clerk for a job well done if achieves 100% or meets local sales skills goal. Local recognition programs are encouraged.
- If not met, coach employee on ways to improve knowledge and performance.
- When accepting a parcel, refer to **hazardous mail** acceptance procedures.
- File at unit for two years.