



Lead Sales and Services Associate

On-the-Job Training Guide

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Lead Sales and Services Associate

On-the-Job Training Guide

United States Postal Service
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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 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.

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Module 1: Introduction to On-the-Job Training

Instructional Methods:

- Demonstration
- Observation
- Coaching

Material Used:

- Lead Sales and Services Associate OJT guide

Introduction to On-the-Job Training

The Lead Sales and Services Associate Academy On-the-Job Training (OJT) course is designed to provide Retail Coaches and Lead Sales and Services Associates (LSSA) with guidelines and resources to be used for a hands-on training approach. On-the-Job-Instructors (OJI) should spend time with the trainee to ensure complete comprehension of daily retail transactions. OJT is used to acquaint employees with their new position, acquire knowledge and skills related to changes in work processes, and to implement refresher training.

The advantage of OJT following the academy portion of training is to facilitate transference of learning from classroom to the work unit. As an OJI, you play an important role in this training. Your willingness to share information, demonstrate how to perform tasks, and answer questions is essential to the success of the training process.

Lead Sales and Services Associate Training Program

Lead Sales and Services Associate Training program is a combination of training including 3 hours of eLearning followed by 16 hours of classroom instruction and 16 hours of OJT.

eLearning Pre-requisite Components

Three eLearning courses are required before attending the Lead Sales and Services Associate Academy.

eLearning courses include:

- Mobile Point of Sale (mPOS)
- Self-Service Kiosk (SSK-R)
- RSS Back Office Administration

Classroom Training

The classroom portions of this program include the following modules:

Module 1: Introduction

Module 2: LSSA Role and Responsibilities

Module 3: World-Class Customer Service

Module 4: Unit Operations

Module 5: Daily Unit Financial Report

Module 6: Leadership

These topics are presented using instructional methodologies, such as discussion, activities, role-play, and eLearning. Other training elements will be presented in an on-the-job environment with hands-on practice. The primary goal of this training program is to provide LSSAs with the skills and knowledge to perform their duties.

On-the-Job Training

OJT is 16 hours and may be spread over five days to allow for practice of activities that are not experienced every day. For example, if the LSSA is going to be the custodian of the Unit Reserve, their OJT must include practice with ordering stock. OJIs are encouraged to follow the guidelines provided, and review the LSSA Checklist with the trainee at the end of each day.

OJT Instructors are to be given adequate time to prepare to provide OJT. OJT is designed for the new LSSA to obtain hands-on experience in a designated retail unit where they work one-on-one with an OJT Instructor. The recommendation is that all of portions of OJT occur at the new LSSA's bid location.

OJT is to be personalized based on the bidder's experience and the nature of the postal facility of their assignment. LSSA OJT is not to be performed on overtime. Any exceptions must be approved by the appropriate manager or supervisor.

Module 2: Duties of the On-the-Job Instructor

Instructional Methods:

- Demonstration
- Observation
- Coaching

Material Used:

- Lead Sales and Services Associate Training Participant guide
- Lead Sales and Services Associate On-the-Job Training guide

Duties of the On-the-Job Instructor

As an OJI, you play an important role in this training. Your willingness to share information, demonstrate how to perform tasks, and answer questions is essential to the success of the training process. OJIs are provided with a Lead Sales and Services Associate Training participant guide for reference and use during OJT.

The OJI conducts this portion of training upon completion of the site orientation. Enclosed in the back of this guide is an OJT Task Checklist that you use to provide the trainee with an appropriate learning experience. Management reproduces the OJT Task Checklist and certification locally. Initial the proper item on the checklist as each item is completed. Trainees may indicate items for which they would like supplementary coaching in the additional assistance column.

Upon successful completion of OJT, complete your portion of the Certification of Completion, Lead Sales and Services Associate On-the-Job Training (OJT). Customer Service unit manager/Postmaster/supervisor submits only page 4-6 to the Manager, Learning and Development unit. The District Manager, Learning Development and Diversity Instructions records the completed training in HERO.

You should show a caring attitude and encourage learners to ask questions and to share experiences and information. This creates an environment of trust in which learners are more likely to learn and apply the information. Your goal is to help the learners understand the tasks and apply them to the job. Allow the new LSSA to provide feedback and share what they see as obstacles in completing a task. Use this feedback to determine if further instruction is needed.

Follow this process for each of the LSSA On-the-Job tasks:

- Demonstrate how to perform a task
- Observe learners performing the task
- Repeat this process as needed

Setting the Stage for OJT

An OJT reinforces classroom and eLearning training and provides learners with the knowledge and skills to perform LSSA duties. Explain that you will demonstrate tasks and observe them performing LSSA duties. Provide appropriate coaching, feedback, and positive reinforcement.

Demonstrate and Experience Tasks

As the OJI, introduce the new LSSA to the daily duties and responsibilities of their position. As you introduce new tasks, have the LSSA observe, then explain each task, and provide instruction on each step of the task. Once demonstrated, allow the learner to perform the same task with coaching as needed. While observing the new LSSA perform tasks, encourage questions to obtain feedback and verify the learner's understanding of the task. Repeat this process as needed throughout the entire on-the-job instruction.

OJT LSSA Checklist Review

The OJI and the trainee review the LSSA OJT Task Checklist in private to discuss and plan for continued development for the remainder of the OJT. The OJI should use positive reinforcement to promote a learning environment where the trainee is comfortable and demonstrates proficiency.

Module 3: Duties of Facility Manager or Designee

Instructional Methods:

- Demonstration
- Observation
- Coaching

Material Used:

- Lead Sales and Services Associate OJT Training guide

Duties of Facility Manager or Designee

On-the-Job Training Preparation

Review Lead Sales and Services Associate OJT Guide and Lead Sales and Services Associate Participant Guide to become familiar with the materials. Have the learner report to the OJI for OJT.

Contact your district Learning Development and Diversity staff to obtain multiple copies of OJT materials and participant guides. Provide a copy of these materials to each OJI. Management should allow four hours for each OJI to review, upon initial use of materials, prior to providing OJT.

The station manager, Postmaster, or designee will conduct this portion of the training on the first day.

Welcome Session

- Welcome the learner and introduce them to other employees
- Clarify any questions the learner might have concerning the OJT process and LSSA duties
- Emphasize the learner's responsibility to perform their duties in a safe and professional manner
- Reinforce the importance of having a positive attitude towards individual work performance and instill a sense of belonging to the postal team

Tour of Installation

- Review time recording method
- Demonstrate and discuss retail operations
- Introduce learner to the APWU Steward and Safety Captain
- Show swing and locker rooms
 - Obtain locker assignment
- Show entrances and exits
 - Emergency
 - Employee
 - Customer

- Discuss parking
 - Customer
 - Employee
- Show reference materials
 - Bulletin boards
 - Material Safety Data Sheets (MSDS)
- Discuss with the learner the following:
 - Location of the fire extinguisher
 - Location of the safety bulletin board
 - Reporting of accidents
 - The smoking policy
 - Evacuation procedures
 - Means of egress, keeping aisles clear
 - Any asbestos and lead materials in the facility

Administrative Procedures

- Explain work hours
- Outline procedures to follow when unable to report for work
 - Station/worksite phone numbers
 - Time to call
 - Whom to call
- Discuss use of telephone, cell phone, and pagers
 - Post Office telephones are for official use
- Facility Orientation
 - Workroom floor
 - Dispatch/Staging area
 - Collection area
 - Anonymous Mail area
 - Registry cage (if applicable)
 - Carrier hold mail location
 - Parcel storage area
 - Empty equipment storage area

- Supply room/area
- Safes/Vaults
- Retail area
 - PO Box section
 - Caller/Dutch door
 - Retail lobby (writing tables, forms holders, ReadyPost fixture, etc.)
 - Cashwrap area (if applicable)
 - Counterline
 - Close-out area

Note: If the LSSA (trainee) is not being trained in office of the bid assignment, emphasize that other offices may be set up differently.

Upon successful completion of OJT, complete your portion of the Certification of Completion, Lead Sales and Services Associate On-the-Job Training (OJT). Submit only page 4-6 to the Manager, Learning Development and Diversity unit. The District Manager, Learning Development and Diversity Instructions records the completed training in HERO.

Employee Rights and Responsibilities – Safety and Health EL-814, Employees Guide to Safety

Employees have the right to:

- a. Become actively involved in the Postal Service’s Safety and Health Program and to be provided a safe and healthful work environment.
- b. Report unsafe and unhealthful working conditions using PS Form 1767, Report of Hazard, Unsafe Condition or Practice.
- c. Consult with management through appropriate employee representatives on safety and health matters (i.e., program effectiveness) and participation in inspection activities where permissible.
- d. Participate in the safety and health program without fear of restraint, interference, coercion, discrimination, or reprisal.

It is the responsibility of all employees to:

- a. Comply with all OSHA and postal safety and health regulations, procedures, and practices, including the use of approved personal protective equipment.

- b. Keep the work area in a safe and healthful condition through good housekeeping and proper maintenance of property and equipment.
- c. Immediately report safety hazards and unsafe working conditions.
- d. Perform all duties in a safe manner.
- e. Keep physically and mentally fit to meet the requirements of the job.
- f. Immediately report any accident or injury in which they are involved to their supervisors, regardless of the extent of injury or amount of damages.

Module 4: LSSA OJT Task Checklist

Instructional Methods:

- Demonstration
- Observation
- Coaching
- NOTE: Activities as listed below:
 - 1. Accessing and understanding SSRD report
 - 2. Accessing and utilizing WOS reports
 - 3. PS 2856 in MyPO to handle insurance claims
 - 4. C360
 - 5. Weekly clerk schedule – window and overall
 - 6. Package look-up to assist customers at window and on the phone
 - 7. Handling “difficult” transactions that SSA’s won’t/can’t handle
 - 8. Entering Ready Post and Expedited packaging counts
 - 9. Ordering in eBuy+

Are to be completed with coaching with your supervisor, on a case-by-case basis

Material Used:

- Lead Sales and Services Associate OJT Training guide

Lead Sales and Services Associate OJT Task Checklist

1. Initial items as completed.
2. Indicate any tasks that need additional assistance from the Retail Coach/LSSA.

LSSA Skill	Date completed	Trainee Initials	Retail Coach/LSSA Initials	Additional Assistance
LSSA Role and Responsibilities (Displays Working Knowledge)				
Locates the location of retail supplies, scanners, accountable mail, and hold mail areas				
Records workhours using facility time recording operation codes				
Performs end-of-day securing of facility				
Maintains appropriate appearance				
Displays a positive attitude				
Maintains sanctity of the mail				
Promotes Postal Products and Services				
Customer Experience (Displays Working Knowledge)				
Utilizes A+GIST				
Displays appropriate communication skills				
Utilizes RCE Perfect Transaction				
Offers POS Survey				
Follows Wait-Time-In-Line (WTIL) process				
Directives and Resources (Ability to access and perform topic search)				
Domestic Mail Manual (DMM)				
International Mail Manual (IMM)				
Publication 52, <i>Hazardous, Restricted, and Perishable Mail</i>				
Access RSS Procedure guide and CBPMan				
Administrative Support Manual (ASM)				
Postal Operations Manual (POM)				
Handbook F-1, <i>Accounting and Reporting Policy</i>				
Handbook 209, <i>Retail Operations Handbook</i>				
Handbook F-101, <i>Field Accounting Procedures</i>				
Price List, <i>Notice 123</i>				

Lead Sales and Services Associate OJT Task Checklist

1. Initial items as completed.
2. Indicate any tasks that need additional assistance from the Retail Coach/LSSA.

LSSA Skill	Date completed	Trainee Initials	Retail Coach/LSSA Initials	Additional Assistance
Retail Responsibilities (Displays Working Knowledge)				
Opens counter position to provide lunch/break relief				
Performs lobby assistance				
Performs routine SSK maintenance and addresses alerts				
Performs lobby walk-through and replenishes retail supplies and products				
Communicates and provides administrative and technical guidance (present service talk or product information)				
Accesses unit goal and discusses with team				
Performs CBPMan reconciliation and verification				
Completes P.O. Box notice procedures				
Accesses WebBATS				
Uses retail equipment (SSK, mPOS, scanner, etc.)				
Records change order request in MyPO and reviews other retail notifications				
Performs dispatch				
Financial Procedures (Displays Working Knowledge)				
Orders stamp stock				
Processes and/or accepts and verifies application for redeemed stamps and stamped paper				
Prepares and submits appropriate stock for destruction				
Performs Unit closeout (minimum two times)				
Witnesses or performs transfer of fixed credit and conducts physical count of stock				
Forecasts and maintains separate stamped inventory to fill SSA requisitions				
Reviews national and local check acceptance policy and credit/debit card procedures				
Performs advance remittance (minimum two times)				

Lead Sales and Services Associate OJT Task Checklist

1. Initial items as completed.
2. Indicate any tasks that need additional assistance from the Retail Coach/LSSA.

LSSA Skill	Date completed	Trainee Initials	Retail Coach/LSSA Initials	Additional Assistance
Financial Procedures (Displays Working Knowledge)				
Prepares local bank deposit and/or consolidated funds bank deposit (two times minimum)				
Prepares and maintains unit accounting records				
Performs passport application, collects fees, submits transmittal form, photo, and consolidation (if applicable)				
Performs SSA closeout				
Time Management (Displays Working Knowledge)				
Prepares calendar of key retail activities for the next two months				
Makes supervisor/Postmaster approved entries to correct time and attendance records and maintains required supporting documents (with TACS training)				
Coordinates and prepares retail employee schedule using WOS 1994 scheduler and matches workhours to workload				
Reviews employee moves from operation code 45 to 48				

Certification of Completion

Lead Sales and Services Associate On-the-Job Training (OJT)

_____ has demonstrated and provided instructions on the applicable on-job tasks of a new LSSA, and I, _____ have experienced all applicable on-the-job tasks within 40 hours of on-the-job training.

Trainee

Retail Coach/LSSA

Postmaster, Manager, or Supervisor

District Name

Office where OJT completed: _____

LSSA Trainee (Print Name): _____

On-the-Job Instructor (Print Name): _____

OJT Start Date: ____/____/____

OJT End Date: ____/____/____

Customer Service Unit Instructions: Submit this page only to the Manager, Learning Development and Diversity unit.

District Manager, Learning Development and Diversity Instructions: Record completed training in HERO.

