

NATIONAL ASSOCIATION OF POSTAL SUPERVISORS

National Headquarters
1727 KING STREET, SUITE 400
ALEXANDRIA, VA 22314-2753
(703) 836-9660

October 22, 2021

Board Memo 086-2021: Pilot Test Expansion of Employee Engagement (Customer Connect) Lead Cards Downloaded on MDDs

Executive Board,

As a matter of general interest, USPS has recently expanded a pilot test on Employee Engagement (Customer Connect) lead cards to be downloaded on MDDs and used by city letter carriers to the Texas 1, Texas 2, and Texas 3 districts. The goal of this project is to pilot a paperless Customer Connect option, with a real-time electronic lead card data being directed to the Inside Sales Group for immediate follow-up with the customer. A survey will be conducted with the participants in the pilot.

Attached is the October 4 expansion notice, including a stand-up talk and MDD Quick Reference, as well as the original notice from March 25 with ten pilot test locations. This notice was previously posted on the NAPS website under "NAPS Correspondence/Mail."

Please share this information with your membership.

Thank you and be safe.

NAPS Headquarters

RECEIVED

OCT 06 2021

LABOR RELATIONS



October 4, 2021

Mr. Ivan D. Butts
President
National Association of Postal
Supervisors
1727 King Street, Suite 400
Alexandria, VA 22314-2753

Dear Mr. Butts

As a matter of general interest, on March 25, you were notified that Employee Engagement (Customer Connect) lead cards would be downloaded onto Mobile Delivery Devices (MDD) and made available for use by city letter carriers. The pilot test is being expanded to the Texas 1, Texas 2, and Texas 3 Districts beginning on October 8.

The goal of this project is to pilot a paperless Customer Connect option, with a real-time electronic lead card data being directed to the Inside Sales Group for immediate follow up with the customer. A survey will be conducted with the participants in the pilot.

Enclosed is a stand-up talk and an MDD Quick Reference.

Please contact Bruce Nicholson at extension 7773 if you have questions concerning this matter.

Sincerely,

A handwritten signature in blue ink, appearing to read "David E. Mills".

David E. Mills
Director
Labor Relations Policies and Programs

Enclosures

Carrier MDD Quick Reference:

Are you logged into the MDD Scanner with the correct ID?

Are you logged into the correct route?

Are you in the Street Menu?

Scroll down to Option "U" – Lead Card

Follow the screen prompts to complete the lead entry.

Use the Comment Section to note the customer's interest.

- Connect Local
- Priority Mail
- Marketing

Your lead is complete once you see, **"Thank you for submitting a business lead and helping to grow our business."**

*****Should you have any problem, hit ESC to return to the "main menu"*****



Survey Monkey QR Code, please provide your feedback on using the new lead card function

PLEASE PRINT, READ, CERTIFY & POST THIS STAND-UP TALK

Informational Stand-Up Talk for –
Subject: “U” Have The Power To Enter A Lead!



**USE THE NEW “U” MDD SCANNER FUNCTION TO
SUBMIT – A – LEAD TODAY.**

We are so excited to offer “U” the capability to enter leads right on your scanners! When a local business asks questions about shipping or advertising, access the “Lead Card” on your scanner.

While on the street menu select option “U” Lead Card (You may need to select ESC to see the menu). Enter company name, contact name, phone number and email address if available then ENTER to complete street address, city, state, and zip. Once you see “Thank you for submitting a business lead” you’re finished, and your customer will be contacted by a USPS Representative!



On Street Menu
 S Collection Box Info
 B Text Messages
 H Prepaid Acceptance
 D Database Info
 A Accountables Delivery Report
 S Amber Alert
 P Package Lookahead
 L Load Truck
 U Lead Card
 T Time Clock

Company Entry
 Company Name: MDD TACO HUT
 Contact First Name: JOHN
 Contact Last Name: DOE
 Contact Phone: 703 555 1234
 Contact E-mail: Not a required field

Assist Address Entry
 Please select option
 E Enter Manually
 1 10212 STRATFORD AVE
 2 10211 STRATFORD AVE
 3 10210 STRATFORD AVE
 4 10213 STRATFORD AVE
 5 10214 STRATFORD AVE

Address Entry
 Street Name:
 City:
 State:
 ZIP Code:

Comments
 Confirmation
 Thank you INA ZAB for submitting a business lead and helping to grow our business.
 Press ENTER or ESCAPE

NOTE: GPS address option is only available in street mode and close to the business address.

Please use the Comment Section to enter the customer’s interest, i.e., Connect Local, Shipping, or Marketing.

STATION CERTIFICATION:

Station Name: _____

Date Service Talk was given _____

Coordinator (Signature) _____

Management Coordinator (Signature) _____

(Please use online certification to ensure proper unit credit)





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March 25, 2021

MAR 29 2021

Mr. Brian J. Wagner
President
National Association of Postal
Supervisors
1727 King Street, Suite 400
Alexandria, VA 22314-2753

Dear Mr. Wagner:

As a matter of general interest, Employee Engagement (Customer Connect) lead cards will be downloaded on Mobile Delivery Devices (MDD) and made available for use by city letter carriers in ten pilot sites, starting at the beginning of April and running through the first part of June.

The ten pilot test sites are as follows:

- Santa Maria Post Office, Santa Maria, California 93454
- Encino Branch, Van Nuys Post Office, Van Nuys, California 91316
- Arcadia Post Office, Arcadia, California 91006
- Rincon Station, Tucson Post Office, Tucson, Arizona 85710
- Coronado Station, Tucson Post Office, Tucson, Arizona 85711
- Downtown Station, Glendale Post Office, Glendale, Arizona 85302
- Waterloo Carrier Annex, Waterloo, Iowa 50701
- Sioux City Post Office, Sioux City, Iowa 51101
- South Des Moines Station, Des Moines, Iowa 50315
- Davenport Post Office, Davenport, Iowa, 52802

The goal of this project is to pilot a paperless Customer Connect option, with a real-time electronic lead card data being directed to a local Business Development Specialist for immediate follow up with the customer. A survey will be conducted with the participants of the pilot.

Enclosed is a Standard Work Instruction and an MDD lead card update.

Please contact Bruce Nicholson at extension 7773 if you have questions concerning this matter.

Sincerely,

A handwritten signature in blue ink, appearing to read "David E. Mills".

David E. Mills
Manager
Labor Relations Policies and Programs

Enclosures

Standard Work Instructions:

Customer Connect Lead Cards in the Mobile Delivery Device (MDD)

City Delivery Operations

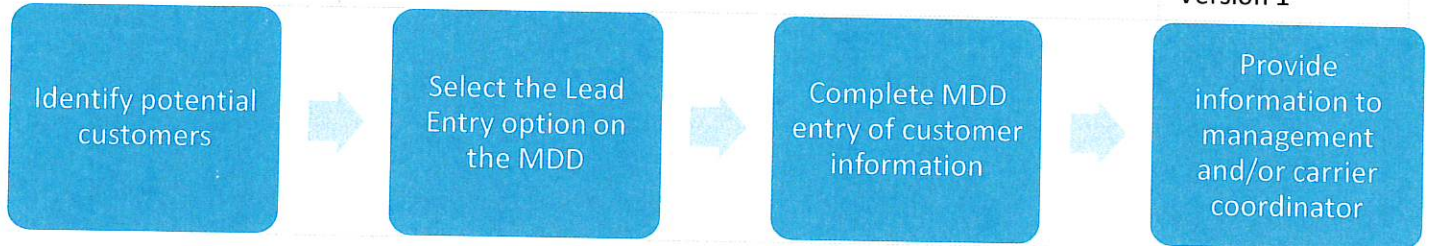
Purpose:

Automate lead card entry, providing employees the ability to directly submit leads via an MDD

Updated on:

3-15-2021

Version 1



Key Points

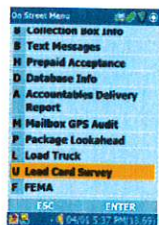
Reasons for Key Points



Identify Potential Customer

- New businesses
- Customers utilizing competitor services
- Businesses leaving flyers in mailboxes
- Existing customer requesting further assistance to grow business
- Customers looking to increase foot traffic
- Ensure to maintain COVID compliance during interaction

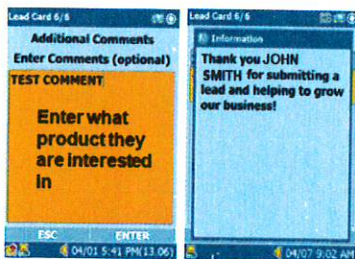
- Generate new revenue
- Increase brand awareness



Select Lead Entry Option on the MDD

- From the main screen select "Lead Card Entry"
 - Press "U" or
 - Scroll to option "U"

- To access Lead Entry menu



Complete MDD entry of customer information

- Company name
- Company address
- Contact name
- Contact phone number
- Email address
- In comment box, enter what product customer is interested in or any other pertinent information available

- To provide customer information that is sent directly to Business Development Specialists
- Expedites process making contact near real time



Provide information to management and/or carrier coordinator

- Notify coordinator/management if a lead(s) was entered
- Communicate and feedback on process

- Provides a means for Headquarters to follow up on the speed of action
- Allow Headquarters to make improvements / enhancements

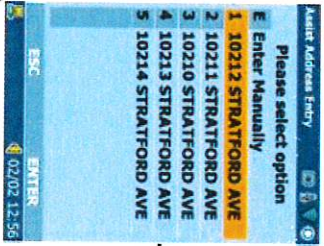


UNITED STATES
POSTAL SERVICE®

Lead Card Update



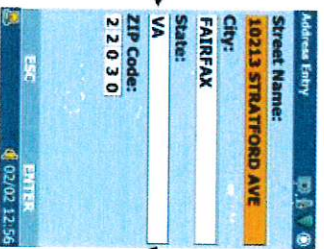
Select "U" or Lead Card and press ENTER



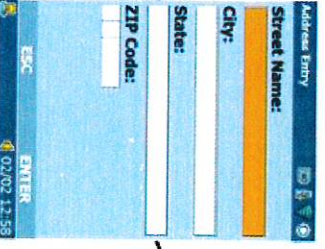
Select desired address and press ENTER



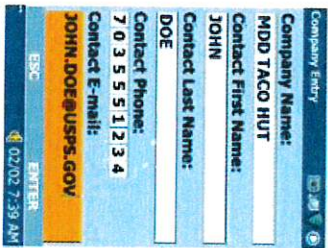
If desired address is not found press "E" or select ENTER MANUALLY



Address will auto-populate. Press ENTER



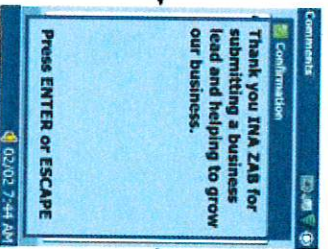
Enter desired address manually and press ENTER



Enter company details. Company name (alphanumeric), contact first name(alpha only), and contact last name(alpha only) required. Press ENTER



Enter any additional comments and press ENTER



Confirmation pop-up appears. Press ENTER or ESCAPE



Screen goes back to "On Street Menu"