

Retail and Post Office Operations

Elvin Mercado

VP, Retail and Post Office Operations

April 2023

CRDO Retail and Post Office Operations



Elvin Mercado
VP Retail & Post Office Operations



Jason Hewitt
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Office Maintenance
Operations



Tracy Raymond
Director, Retail
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Anthony Impronto
Director, Post Office
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Carissa Laino
Director, Field
Operations Support (A)



Kay Hunter
Manager, Capability
& Proficiency



Ashley Tijani
Management Associate
(A)

CRDO Scorecard

CRDO Scorecard

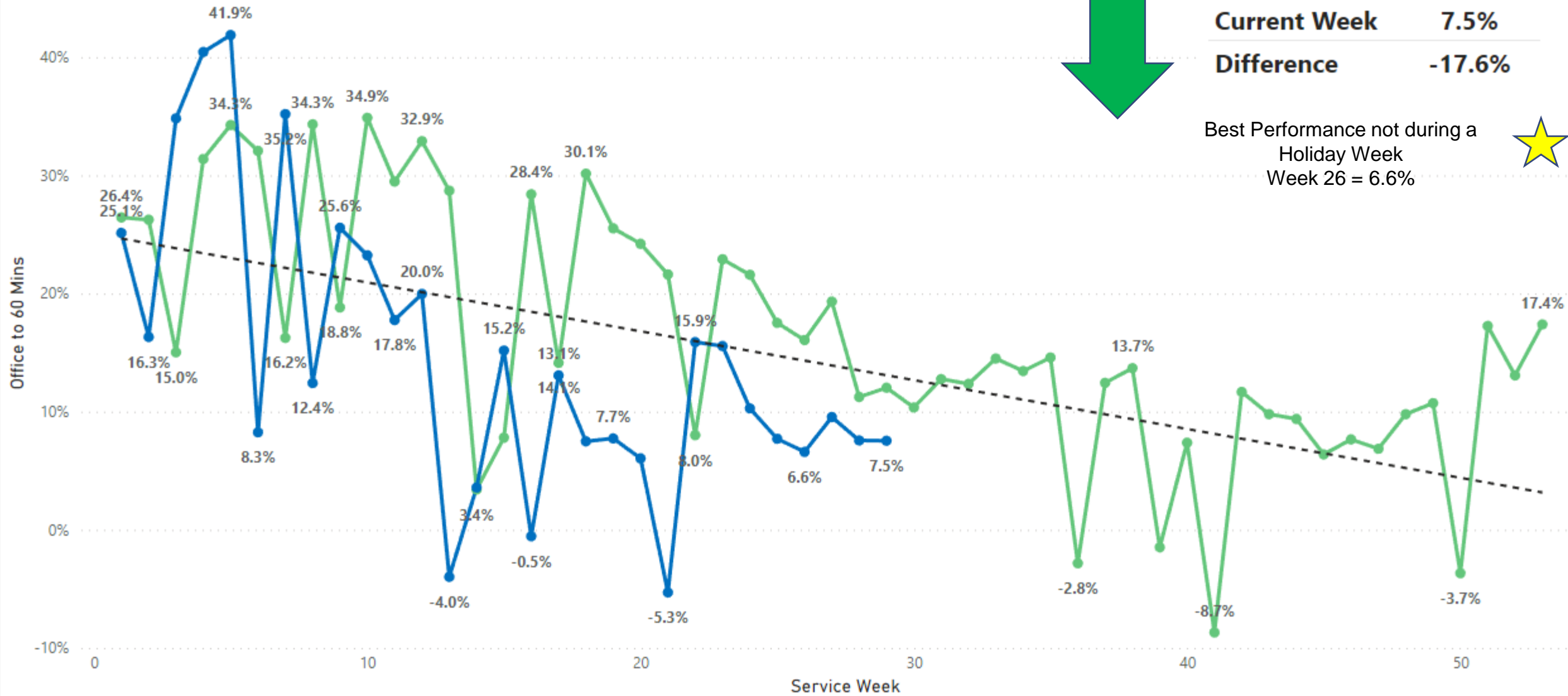
- First introduced on May 17, 2021
- Rankings for District / PCES / PM26 / MPOO 25 / PM24 / All MPOOs
- Rankings are based on 18 metrics
- 16 of the 18 metrics tracked have shown continued improvement

CRDO Top 4 Metric Trends

FY22 vs. FY23

Office to 60 Mins

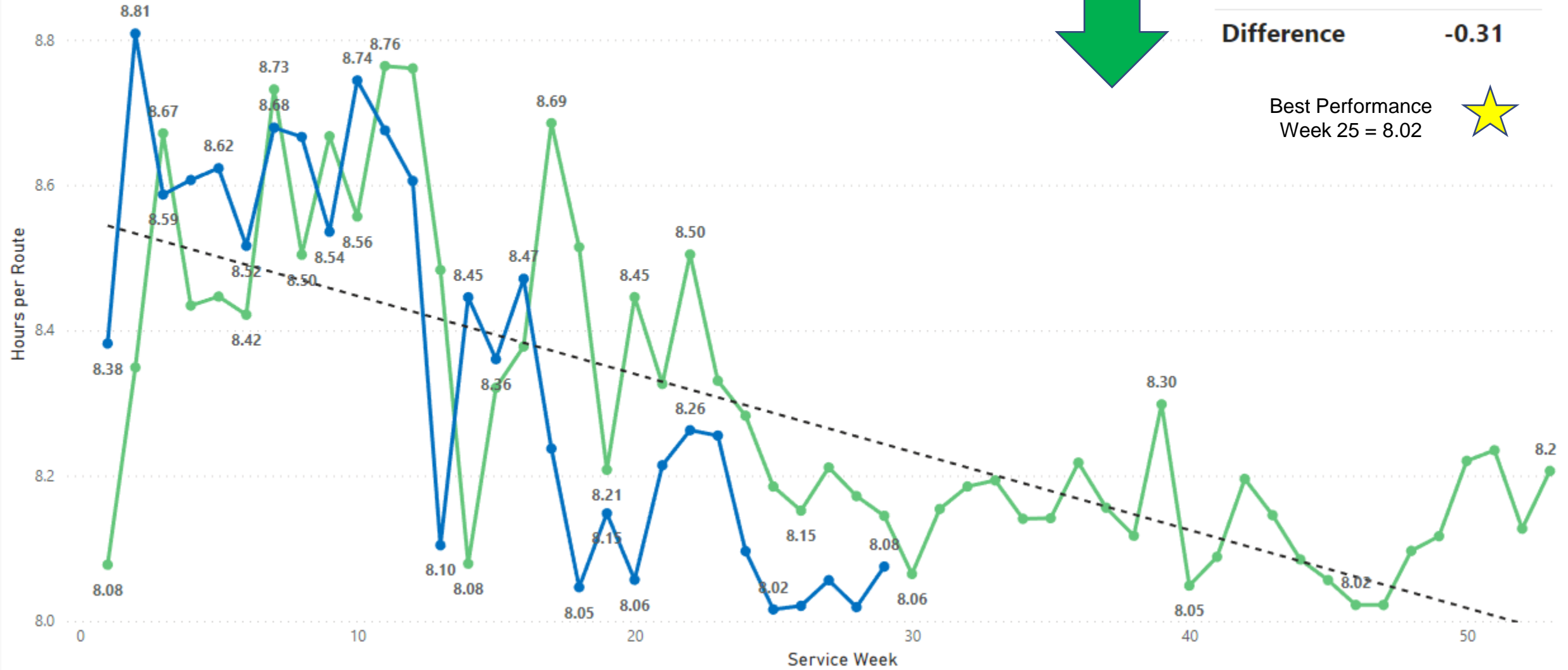
Fiscal Year ● 2022 ● 2023



* The large dip in the metrics corresponds to Holiday Weeks

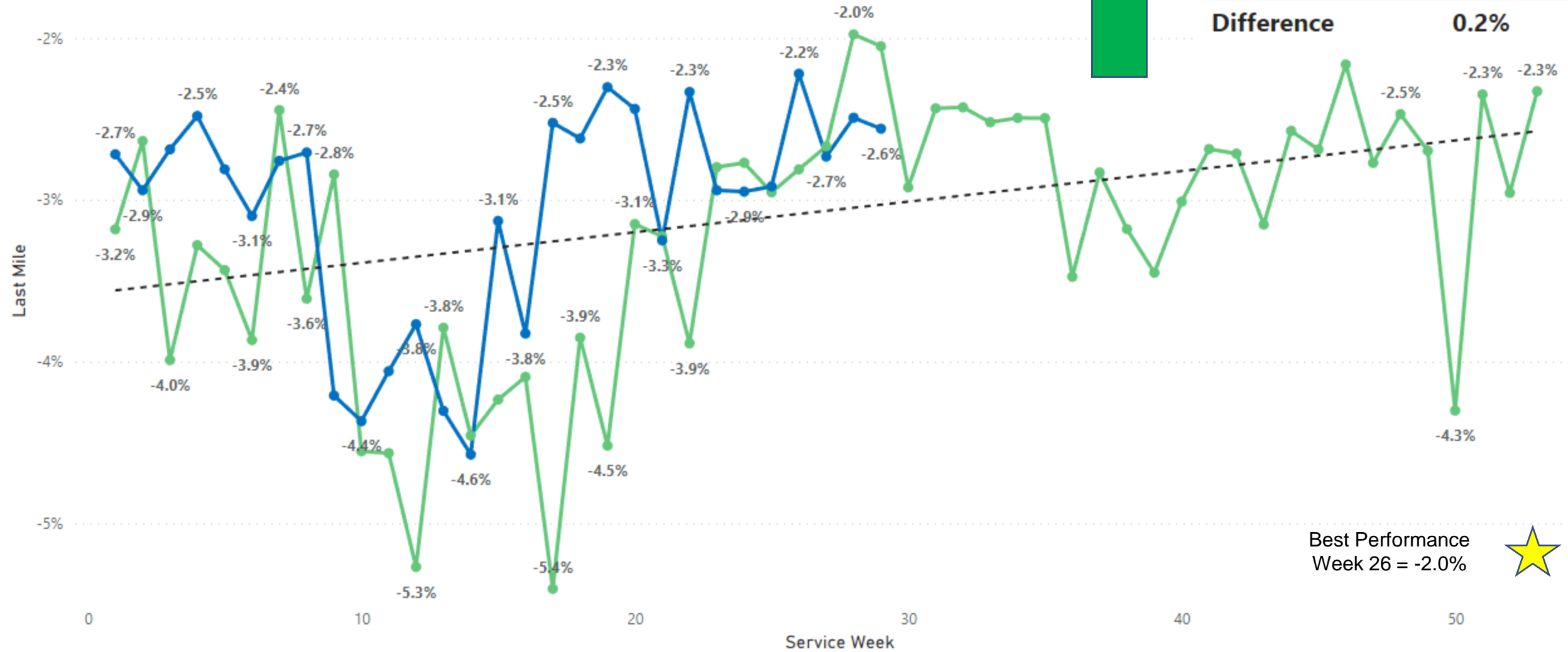
Hours per Route

Fiscal Year ● 2022 ● 2023




Last Mile

Fiscal Year ● 2022 ● 2023



Period	Last Mile
WEEK 1	-2.7%
Current Week	-2.6%
Difference	0.2%

Best Performance
Week 26 = -2.0% 

Scanning Integrity %

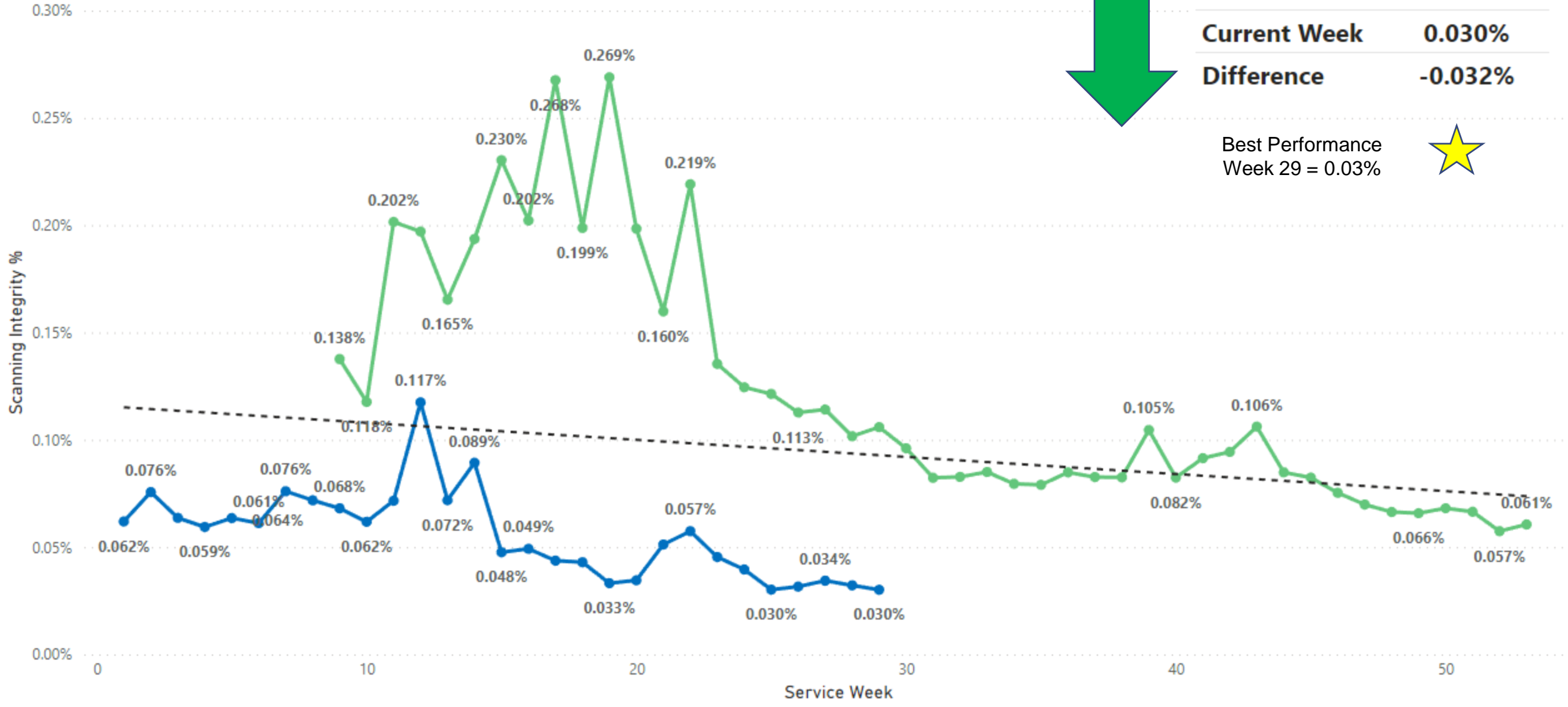


Period	Scanning Integrity %
WEEK 1	0.062%
Current Week	0.030%
Difference	-0.032%

Best Performance
Week 29 = 0.03%



Fiscal Year ● 2022 ● 2023



Peer to Peer Performance Coaching



- Focus on coaching and supporting opportunity sites
- Pair opportunity and top performing sites with same level of complexity
- Incorporate operational excellence coaching: Postmaster and MPOO levels
- Overview:
 - Developing standard work, cadence and process
 - One-on-One pair successful and opportunity sites
 - Cohort peer discussions to share best practices
 - Socialize concept: September 2022

People

- This is the people part of **People**, *Performance*, *Culture*
- We value every employee's growth and contribution
- Support your development by providing the tools and coaching to succeed

CRDO PILLARS OF LEADERSHIP

People

To create an environment where employees are elevated and positioned as the engine of the organization. The organization will encourage employee training and development, work-life balance and a strategic operation that values employee growth just as much as employee contribution.

How We Lead

Performance

To facilitate an environment of efficiency, effectiveness and strategic operation. Employees will engage in activities that deliver for America and facilitate the mission of the organization with minimal waste and sustained productivity.

How We Execute

Culture

To create an environment that builds trust and confidence in our employees. Embracing diversity, open dialogue, and collaboration we will achieve Operational Excellence and win the hearts and minds of our employees. Leaders will engage to bridge the gaps between generations and understand the complex values in varied environments to find the commonality that brings seamless operations and concerted teamwork to meet the Delivering for American plan.

How We Adapt

Retail Experience

Customer Experience Assessment

Why conduct an internal assessment?

Retail is the Face of our Organization

Validate our current process for Point of Sale (POS) Surveys and Retail Customer Experience (RCE)

Bridge the gap to focus on what is important to our customer during their transactions

Improve the "Voice of the Customer"

Currently Retail Customer Experience conducts 14,978 evaluations per quarter on 7,489 units

Last Quarter:
479,402 Point of Sale (POS) surveys were completed on 174,429,419 customer visits which is only 0.27%

Goal: Conduct assessments on all Retail System Software units 18,845

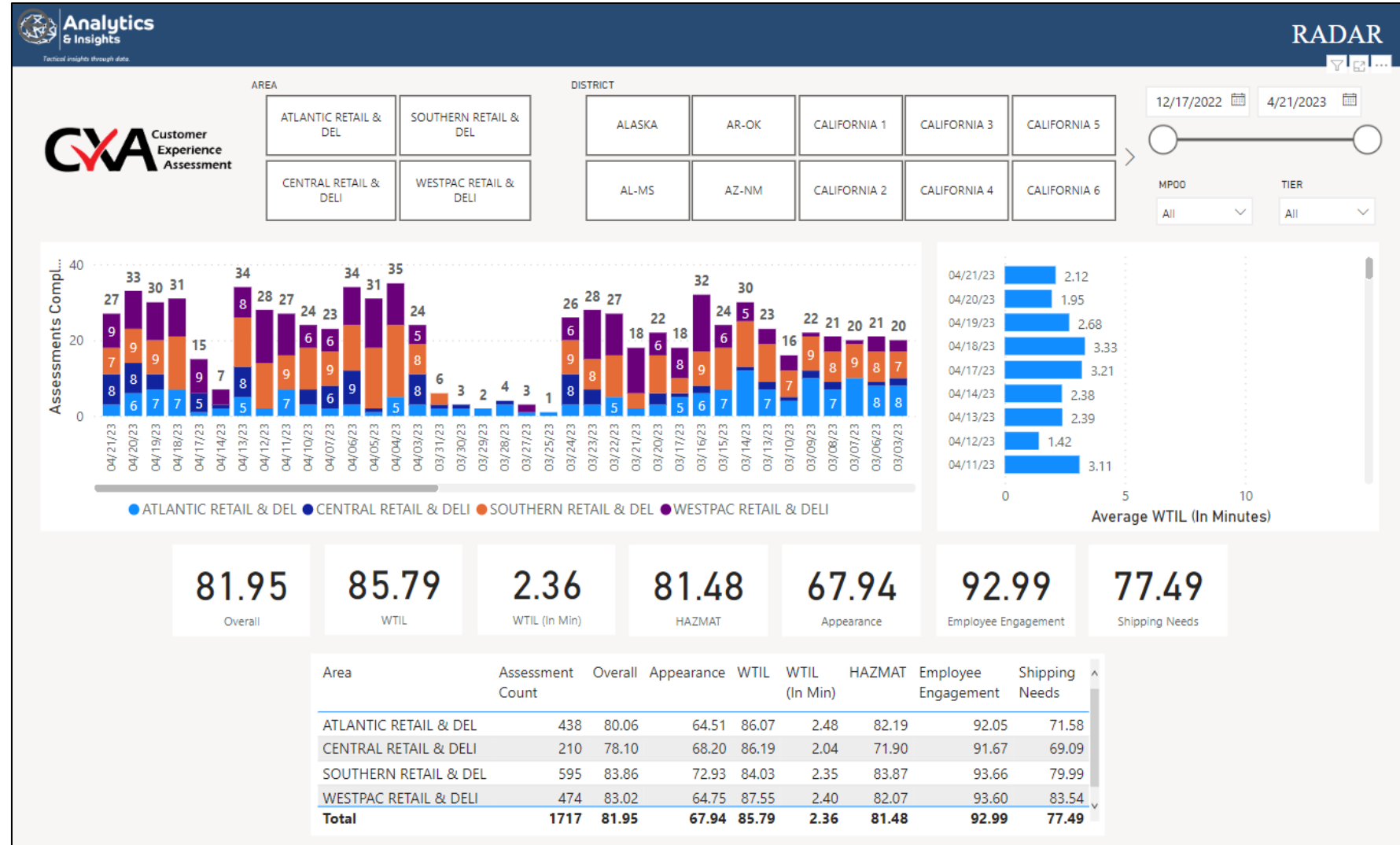
Brand Impact – Top Risks Found



National Results:

- **Hazmat**
81.48%
- **Appearance**
67.94%
- **Shipping Needs**
77.49%

All Areas shared these same categories as their top three risks



CXA & RCE - Overall Performance

Area	# RCE Shops	# CXA (Dec-Apr)	Overall RCE	Overall CXA
Atlantic	10117	438	93.48	80.06
Central	6582	210	93.56	78.10
Southern	7601	595	92.51	83.86
WestPac	6403	474	91.15	83.02
Nat'l	30703	1717	92.68	81.26



National - POS Survey Trend (Wk. 1 vs. last 6 Wks.)

	22.01
POS OSAT	86.38%
Positive Attitude	91%
Treated with Courtesy	92%
Wait Time Acceptable	89%
Worked Efficiently	92%
Knowledgeable	92%

	23.24	23.25	23.26	23.27	23.28	23.29
POS OSAT	86.90%	87.30%	87.22%	87.18%	87.42%	87.24%
Positive Attitude	92%	92%	92%	92%	92%	92%
Treated with Courtesy	92%	93%	93%	92%	92%	92%
Wait Time Acceptable	89%	90%	90%	89%	89%	88%
Worked Efficiently	92%	93%	93%	92%	93%	92%
Knowledgeable	92%	93%	93%	93%	93%	93%

Passport Performance

Passport Performance YTD (FY'23)

Passport Performance YTD										
Area	Number of Locations	Passport Transactions for Period	Passport Transactions for SPLY	% Passport Transaction Increase SPLY	Photo Transactions for Period	Photo Transactions for SPLY	% Photo Transaction Increase SPLY	Total Transactions (Passport & Photo) for Period	Total Transactions (Passport & Photo) for SPLY	% Passport & Photo Transaction Increase SPLY
National	4,766	4,896,141	4,008,697	22.1%	3,269,416	2,542,690	28.6%	8,165,557	6,551,387	24.6%
Atlantic Area	1,666	1,573,432	1,316,071	19.6%	1,039,517	817,842	27.1%	2,612,949	2,133,913	22.4%
Central Area	1,317	996,658	748,188	33.2%	772,902	550,737	40.3%	1,769,560	1,298,925	36.2%
Southern Area	918	1,090,401	876,428	24.4%	708,726	538,261	31.7%	1,799,127	1,414,689	27.2%
WestPac Area	865	1,235,650	1,068,010	15.7%	748,271	635,850	17.7%	1,983,921	1,703,860	16.4%
Passport Revenue YTD										
Area	Number of Locations	Passport Revenue for Period	Passport Revenue for SPLY	% Passport Revenue Increase SPLY	Photo Revenue for Period	Photo Revenue for SPLY	% Photo Revenue Increase SPLY	Total Revenue (Passport & Photo) for Period	Total Revenue (Passport & Photo) for SPLY	% Passport & Photo Revenue Increase SPLY
National	4,766	\$171,364,935	\$140,304,395	22.1%	\$49,041,240	\$38,140,350	28.6%	\$220,406,175	\$178,444,745	23.5%
Atlantic Area	1,666	\$55,070,120	\$46,062,485	19.6%	\$15,592,755	\$12,267,630	27.1%	\$70,662,875	\$58,330,115	21.1%
Central Area	1,317	\$34,883,030	\$26,186,580	33.2%	\$11,593,530	\$8,261,055	40.3%	\$46,476,560	\$34,447,635	34.9%
Southern Area	918	\$38,164,035	\$30,674,980	24.4%	\$10,630,890	\$8,073,915	31.7%	\$48,794,925	\$38,748,895	25.9%
WestPac Area	865	\$43,247,750	\$37,380,350	15.7%	\$11,224,065	\$9,537,750	17.7%	\$54,471,815	\$46,918,100	16.1%



Passport Revenue & Expansion Plan

Benefit of Driving Passport Services

- ✓ YTD Revenue: **\$220.4 Million**
- ✓ YTD SPLY: **23.5%**
- ✓ EOY Forecast: **\$420 Million**
- ✓ Market Share: **72.34%**
- ✓ Total Passport Acceptance Locations Certified: **4,766**
- ✓ Total trained Agents for FY'23 to accept Passports: **18,153**
- ✓ New Passport Acceptance Facilities added in FY'23: **15**
- ✓ Passport locations reinstated: **30**

Expansion of services

- Implement Walk-In Passport service 3 hrs. per week at all passport locations
- Resume Passport Fairs (Suspended during COVID)
- Update Online Scheduling Tool to address fraudulent appointments
- Expand Photo services at Non-Passport sites, additional revenue generation



Government Services Expansion

Enterprise Biometric Identity Services (EBIS)

Phase 2

Current FBI (181 Sites + 10 Pilot) - Deployed January 2023

- \$1,832,550 Revenue FY23 to Date
- 36,651 Transactions FY23 to Date
- \$2,345,250 Revenue SPLY
- 46,905 Transactions SPLY



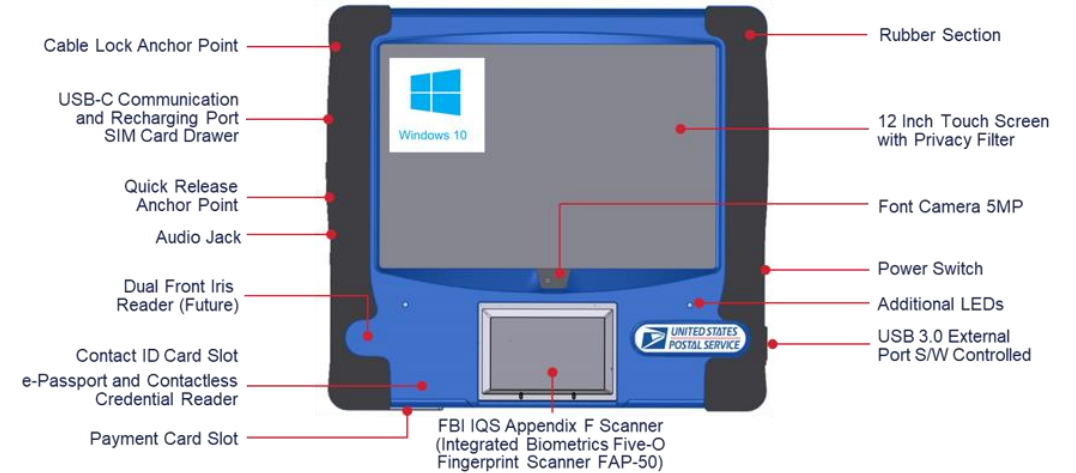
Phase 3

New FBI (Expansion Sites) – Deploy through FY24*

- First 200 sites equipment deployment starting in FY23 (Stage 1 & 2)
- Additional 300 (Stage(s) 3-5) to ship in increments of 100

* Equipment deployment to current passport acceptance retail locations nationwide

Biometric Collection Kit – SIC Tablet Features



EBIS Next Steps	Status	Responsible
EBIS Training available in HERO	Completed February 2023	HR/Competency
Topeka equipment imaging with latest release for Phase 2 sites	Beginning 1/3/23	IAM/EBIS
Phase 2 receive and install equipment	1/9 – 1/30/23	Site Coordinators
Confirm Phase 2 Site Readiness	NLT 1/30/23	HQ Field Support / Site Coordinators

Login.gov In-Person Proofing (IPP)

Phase 1

Pilot (7 Sites) Deployed July 27, 2022

- Total Revenue (Firm Fixed): \$99,582
- Total # of Transactions (7/27/22 – 1/31/23): 107



Phase 2

All Retail Units with RSS ~18K sites launched February 1, 2023

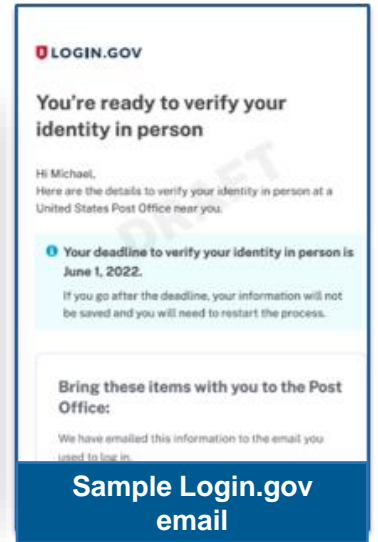
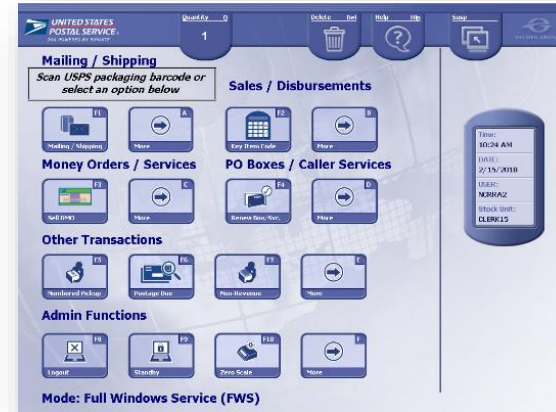
- Total Revenue (Firm Fixed): \$5.55M
- Total # of Transactions: Up to 750K



Phase 3

Transactions exceed 250K

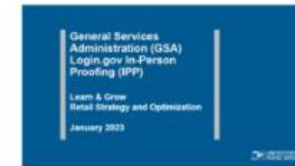
- Total Revenue (Firm Fixed): \$1.8M
- Total # of Transactions: Up to 250K



January 2023 Communication Blitz



Visual Cue Cards



Learn & Grow Sessions



Retail Digest Articles



Retail Service Talk



RSS Memo Views



MDD-IO Messaging

Dept of Labor (DOL) In-Person Proofing

Phase 1

Pilot Launched March 3, 2023

- Total # of Transactions (3/3/23 – 3/31/23): 5
- 3 Arkansas Pilot Sites



Phase 2

Expansion to Launch April 2023

- 7 additional Arkansas Pilot Sites



Phase 3

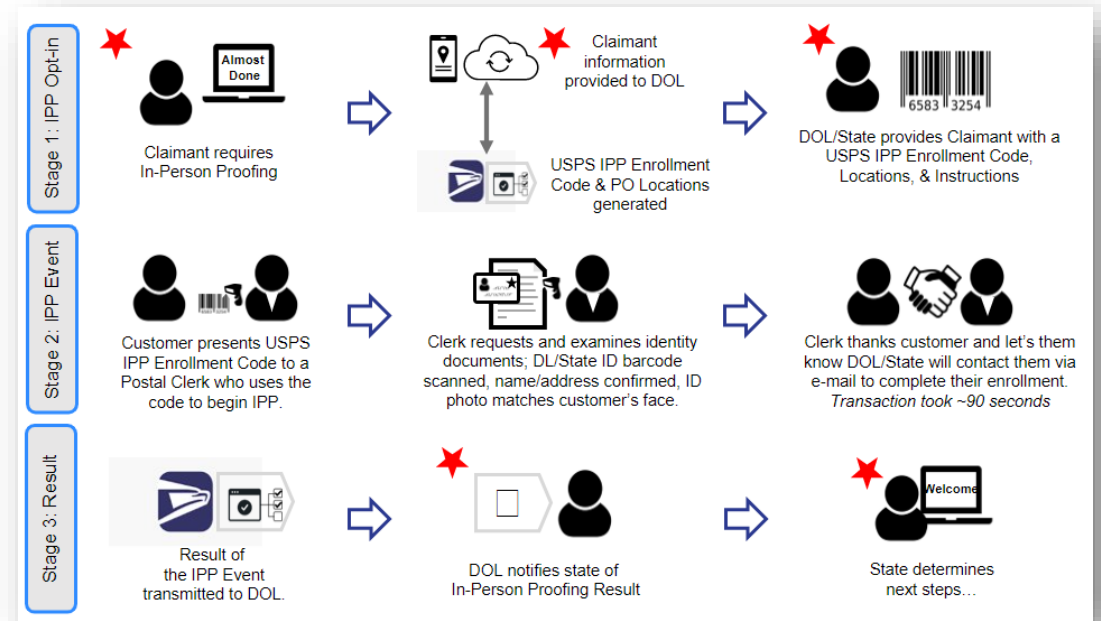
Expansion through May 2023

- 10 Oregon Pilot sites
- 10 Oklahoma Pilot sites



DOL In-Person Proofing Program

- 30 Locations
- 3 States
- Total Revenue (Firm Fixed): \$150K up to 4K Transactions



Government Services Agency (GSA) USAccess Personal Identity Verification (PIV) Expansion

Phase 1

Pilot (6 DC/MD/VA Sites) Launched Nov 2020

- \$215K+ Revenue FY23 to Date
- 6529 Transactions FY23 to Date
- \$342K+ Revenue Jan – Sep 2022



Phase 2

Expansion (Colleyville, TX) Launched Nov 2022

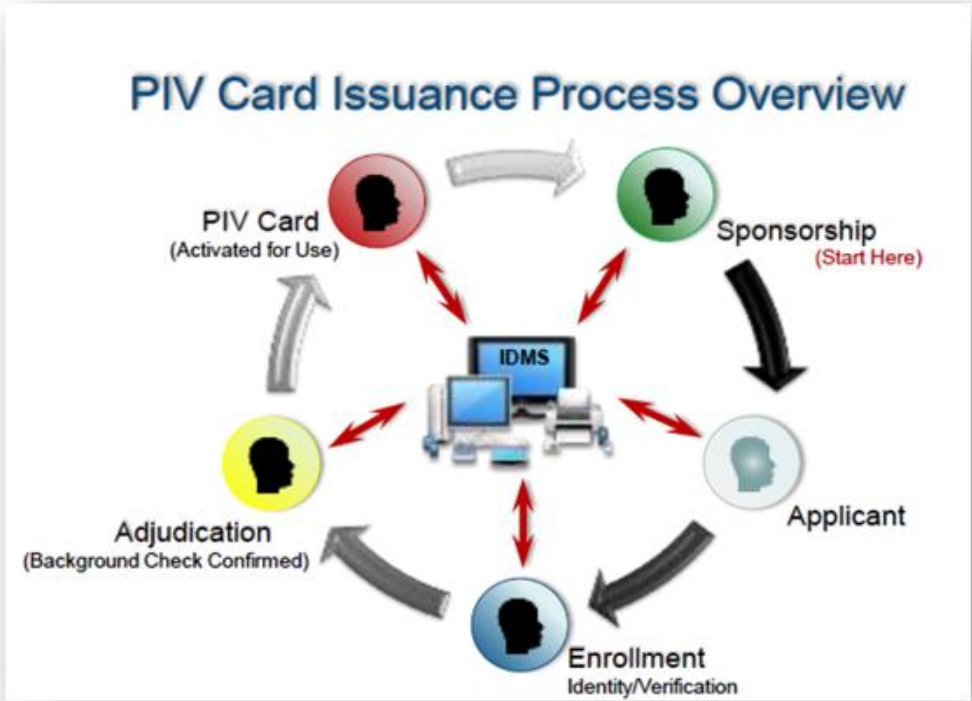
- \$24,493.62 Revenue FY23 to Date
- 497 Transactions FY23 to Date



Phase 3

Expansion to Launch Through May 2023

- 5 Southern Area Sites



CA Department of Motor Vehicles (DMV)

*9,363 total transactions across all pilot sites since inception 10/2021

Active Kiosk Locations
LA MAIN 7101 S CENTRAL AVE LOS ANGELES, CA 90001
CHULA VISTA 750 3 RD AVE CHULA VISTA, CA 91910
CLOVIS 655 MINNEWAWA AVE CLOVIS, CA 93612
NEWPORT BEACH 1133 CAMELBACK ST NEWPORT BEACH, CA 2658

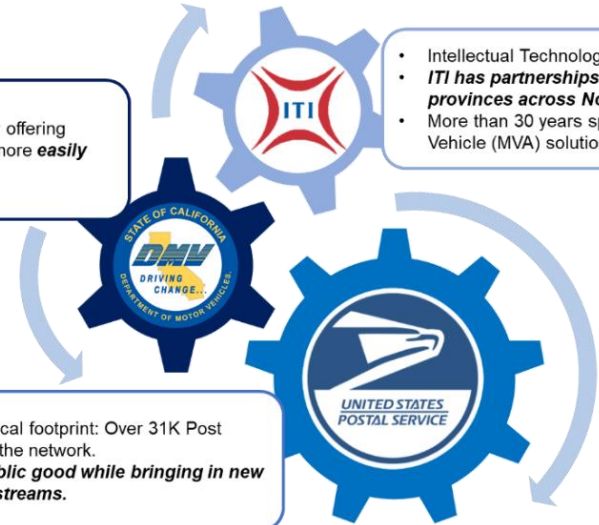


Large, stand-alone units
Cash, credit/debit cards
Issue 2-year registrations
12 square feet

• *Expand service to public* by offering certain DMV transactions in more **easily accessible locations**.

• Vast physical footprint: Over 31K Post Offices in the network.
• *Serve public good while bringing in new revenue streams.*

• Intellectual Technology Inc: Kiosk vendor
• *ITI has partnerships with 38 states and provinces across North America*
• More than 30 years specializing in Motor Vehicle (MVA) solutions.

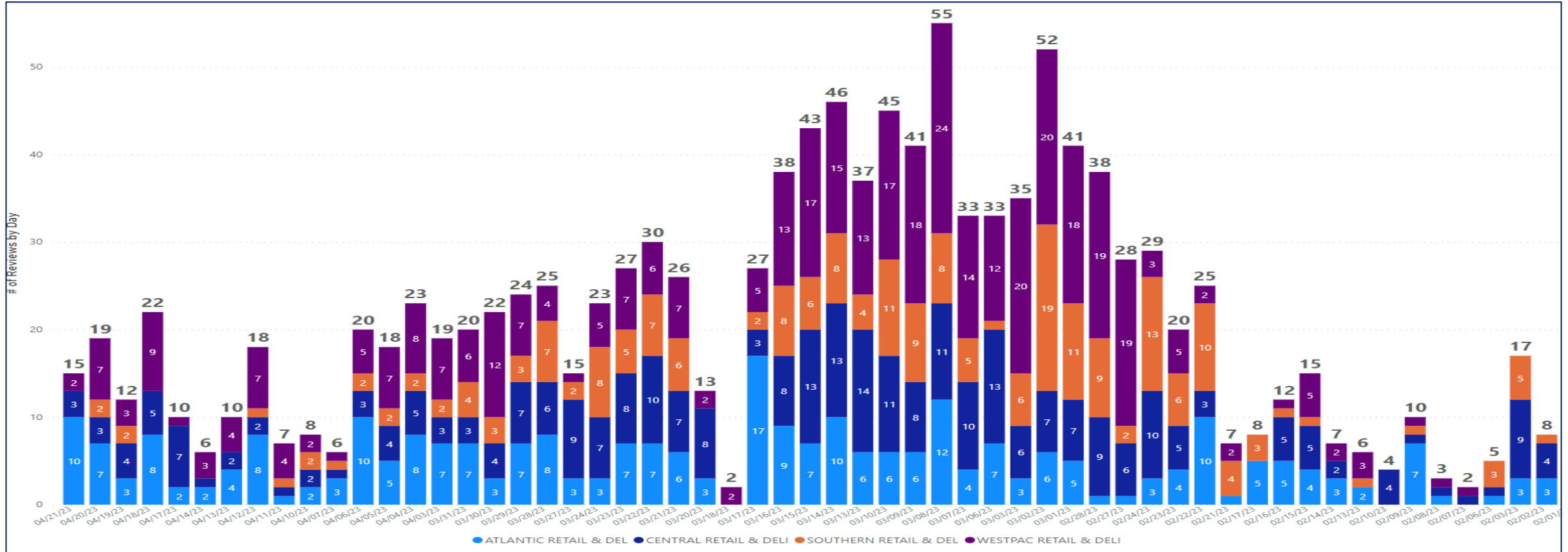


Field Maintenance Line H Gemba Assessments

PS 4776 Gemba Assessments

Line H Gemba Assessments

- Goal 100/week
- Seeing improvements in the process



PS 4776 Gemba Assessments

Week 28 Average Score: 70%

- Findings:

- Positives:

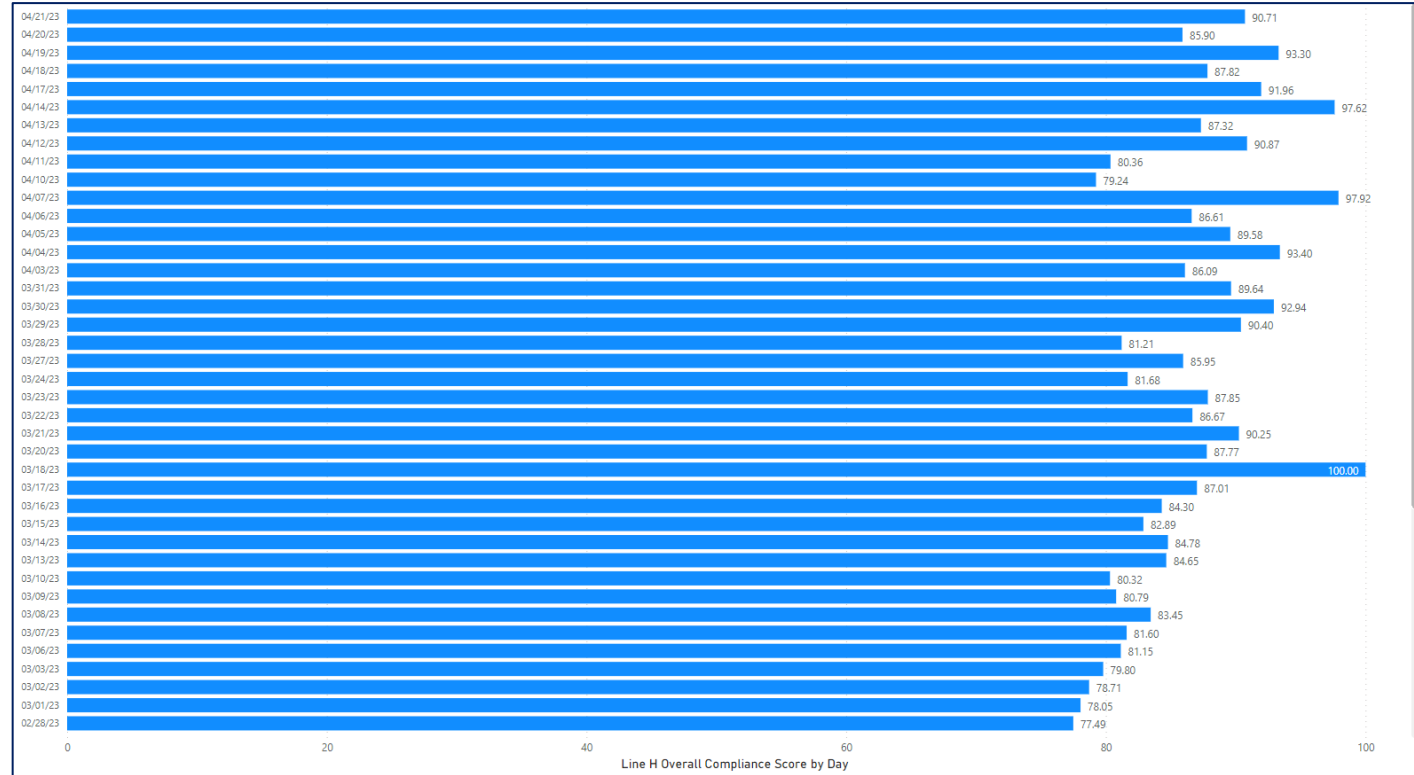
- 4776's are being utilized
- Custodians are aware of the process
- Upload process in RADAR

- Deltas:

- Craft/EAS signatures/initials (page 2)
- Missing daily route sheets (Page 1)
- Not completing 4776's properly

77%

100%



Field Maintenance Ticketing System Pilot

Design and execution



Existing Field Work Order Process

Last Update June 1998

Hard copy PS-4805

- Paper/manual form
- Has to be transcribed to a SOR
- No established communication flows are defined
- Long process lead time
- Minimal process accountability



Concept presented to executives

Dec 2022

Presentation

- No visibility currently to track workorders
- New system will allow tracking with no special access needed
- Accountability standards
- Reduce cost

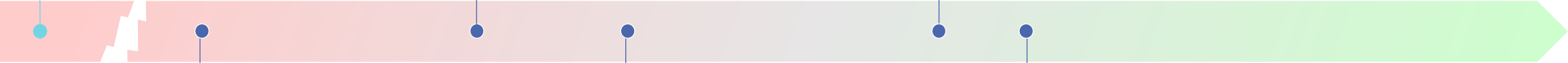


Weekly Sprints

Jan 2023 – March 2023

Refining

- Added sites weekly in each Area (20 sites)
- Weekly sprint calls
- Workflows refined
- Database fields refined
- Team testing



25 Year Gap

Define System Requirements

- Where will it be housed
- Process Mapping – Current/Future
- What are needs
- Who are the stakeholders
- 14,714 Total facilities
- 36 support specialist monitoring

Phase 1 Pilot Sites

- Training for Field Offices
- Training for FMO teams
- Training for support staff
- NV-UT and Maryland go live

Phase 2 Pilot Expansion

- Training for Field Offices
- Training for FMO teams
- Training for support staff
- Training PODS for all 50 districts
- POD's go live with entering GEMBA's
- 21 Districts go live



CRDO FMO Ticketing Concept Meeting

Nov 2022



1st Sprint - 2 District Go Live Test

Jan 2023



20+ Go Live Test

April 2023

RADAR Concept

- Clean visual interface
- Trackable
- Easily identifiable
- Support specialist assigned
- Power Bi reporting
- Stakeholder notifications




Submit a Workorder

Area	Select
District	
Lead Finance	
Facility	
Creator's Contact e-mail	jessica.m.vandever@usps.gov (Not your correct e-mail? Click here to change it.)
Contact e-mail (if different from Creator's)	
Contact Phone Number	
Urgency	
What was the origin of this workorder?	
Repair Type	Select
Repair Sub Type	



Proof of concept – Ticketing system data & survey results

We have tested and refined the workflow with nearly 50K tickets in a 90 day period.

 **Field Maintenance Ticketing System**

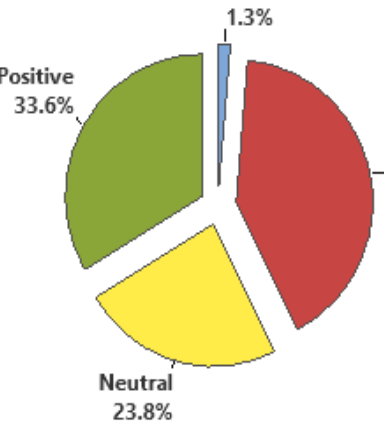
Enter New Ticket | [MOS User Guide](#) | [FMO hours](#) | [FMO Field Report](#) | [FMO Support Report](#) | [Set Access](#) | [Feedback](#) | Ticket Generated | Repair Type

Area	All Requests	Assign not Complete	Field Unassign	Assigned FMO	Assign Custodian	Assign CMC	Assign FSSP		Completed		> 7 days		> 14 days		> 21 days		> 30 days	
							Nbr	%	Nbr	%	Nbr	%	Nbr	%	Nbr	%	Nbr	%
ATLANTIC RETAIL & DEL	5,925	2,391	255	4,739	105	63	488	8.24	3,251	54.87	1,748	29.50	1,231	20.78	882	14.89	609	10.28
CENTRAL RETAIL & DELI	12,599	4,372	212	10,802	394	105	441	3.50	8,002	63.51	2,974	23.61	2,131	16.91	1,149	9.12	342	2.71
FLEET MANAGEMENT	135	88	13	100	2	1	5	3.70	34	25.19	80	59.26	61	45.19	49	36.30	19	14.07
SOUTHERN RETAIL & DEL	7,086	3,520	392	5,455	155	158	416	5.87	3,153	44.50	2,655	37.47	1,826	25.77	1,105	15.59	569	8.03
WESTPAC RETAIL & DELI	23,324	10,231	710	19,964	228	118	445	1.91	12,366	53.02	6,720	28.81	4,068	17.44	2,353	10.09	762	3.27

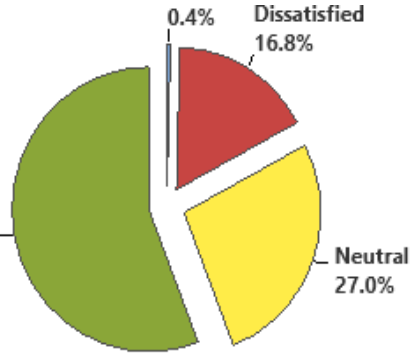
How satisfied are you with communication about how your requested office repairs are proceeding?

How often are you frustrated by the work request process?

Current process

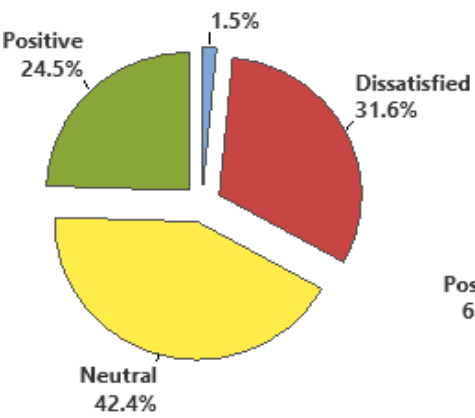


New process

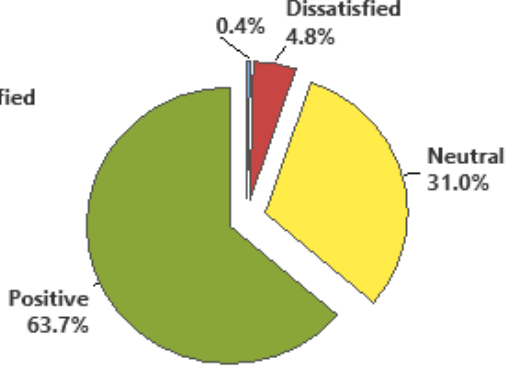


Over 5k field users completed the survey

Current process



New process



Function 4 Level 3 Reviews

Legacy Process v. Project Proposal

What's Behind the F4 Level 3 Review Project Proposal?

Could we use workload data and technology to assess our Retail & Post Office Operations complement? Is the current Function 4 Level 3 on-site “team review” process antiquated?

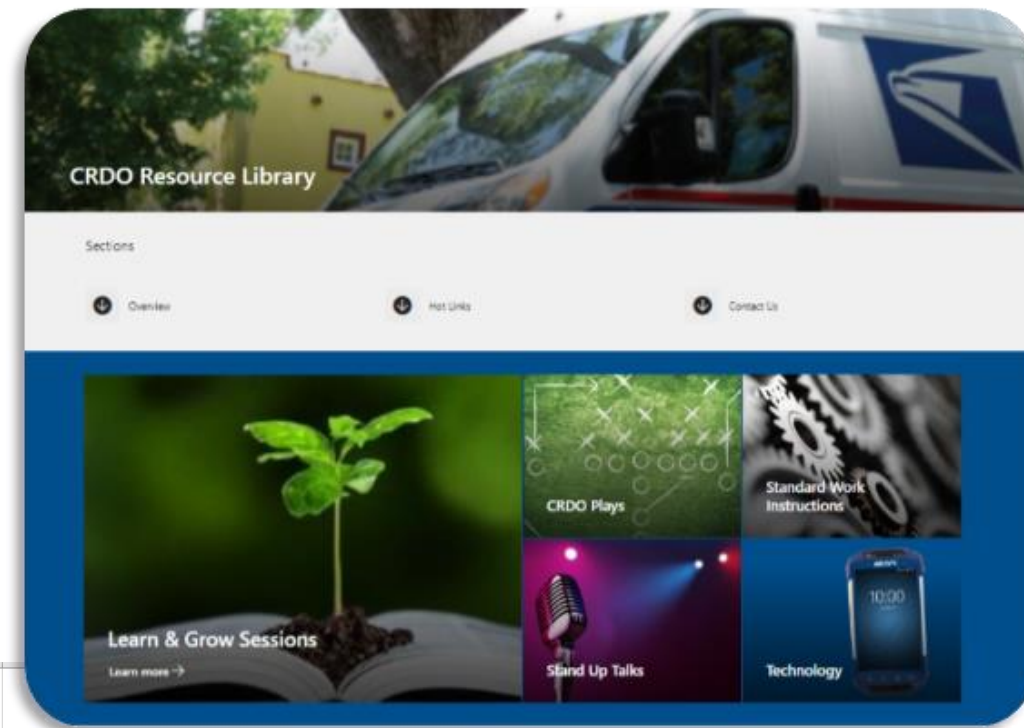
Goals of proposed process:

- Avoid “resource burdens” when we build teams to perform Level 3 reviews
 - Proposed process would have a shorter timeline from start to finish with 1- 2 EAS involved
- Step 1 - HQ designee performs a standardized desktop review to gather data (Duration 1 day)
- Step 2 - Conduct an onsite visit to perform a standardized validation process to confirm accuracy of desktop data. Designee would partner with local leadership (Duration 1-2 days)
- Entrance and Exit meetings format with stakeholders would not change

Enhancing Employee Knowledge and Engagement

Capability And Proficiency

- Leadership Bridge to Success
- CRDO Tools for Success Links and Standard Work Instructions-SWI
- Upskill the Workforce through Training
- Winning Strategies Shared



UNITED STATES POSTAL SERVICE Field Operations Support												Version 2.3
Metric Checklist												
Lagging Indicators	Assessment	F2C	F2A	F4	Service	Scanning	Planning & Scheduling	HR	LR	Maintenance	AMS	Full Circle
	Standardized End to End Review	Office Variance to 60 mins	ADHOC Assist	Retail	NDI	PBS	IOP (Integrated Operating Plan)	Employee Availability	Attendance Control	Exterior Building Conditions	AMS Review	Election Mail / Political Mail
	HAZMAT	BT to Geo Fence Depart	Workhour LTATS	Back Office	Last Mile Flats	AAU/ADE	Route Coverage	CCA to CAP	Article 8	Interior Building Conditions		Media Inquiry
	The 65	Stationary Events	2080/2240	VAP to GAP	AAU/No STC	Integrity	Resource Share Play	EAS to CAP		Employee Parking Lot		AVP Inquiry
Leading Indicators	Housekeeping	Return Geo Fence to ET	DACA 3/5/X Days	BT vs. DUT	Bundle Visibility	All Scanning		Complement / Hiring		Customer Parking Lot		RDOCC Inquiry
	Election Mail / Political Mail	Street Variance to Base	RRECS Activity Scanning	CSV	C360	Parcel Select		Employee Retention		Cooling/Heating		DM Request
		Sunday Performance	Rural % to STD	AAU Prior Day	RFS	Priority 1-Day				Restrooms		
		Loading Checklist	Sunday Performance		First Mile	WIMP				Retail Lobby		
					SPM No Tripsec							
					SPM Ignored							

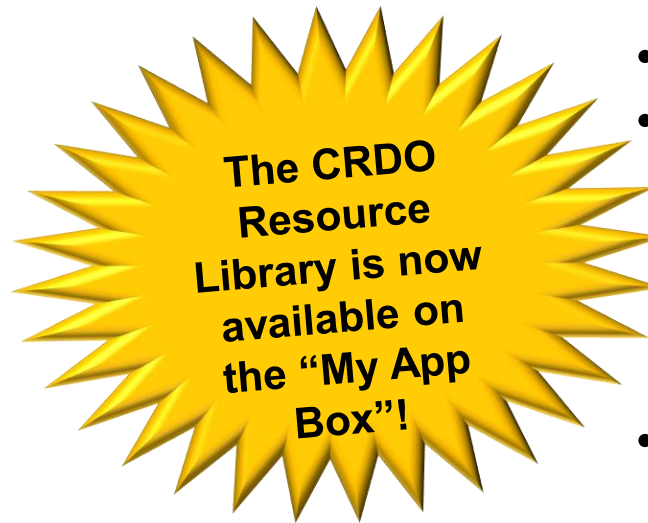
Click on Lagging Indicator for Complete Lagging Checklist or Leading Indicator for Specific Leading Checklist

Learn and Grow Offerings - FY23	Participation YTD
Learn and Grow Sessions	38,106
Targeted Trainings	66,752

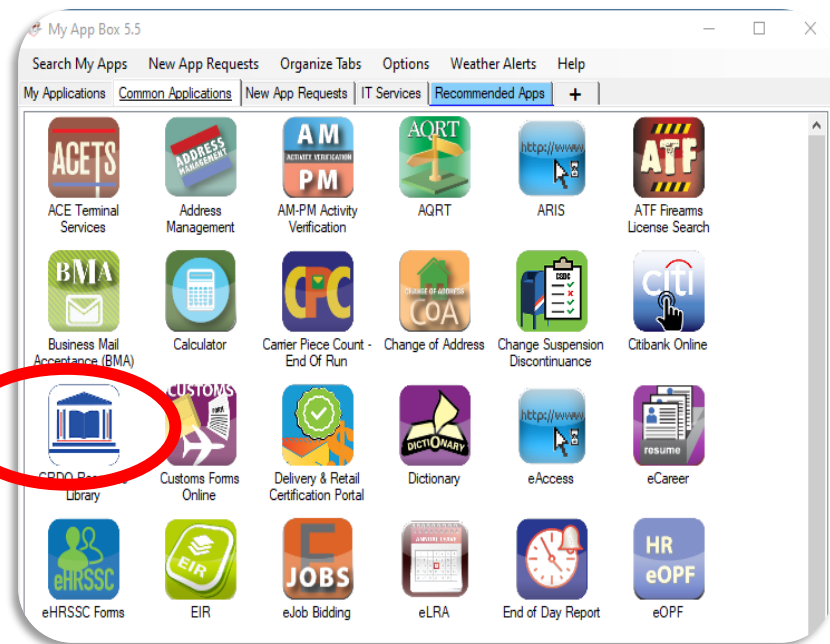
CRDO Resource Library

The CRDO Resource Library is your **one stop shop** to all training materials produced by HQ Retail, Delivery, & Post Office Operations with **NEW CONTENT** added weekly.

The [CRDO Resource Library](#) can be found under Featured Topics on the Blue Page



- CRDO Plays
- HQ Learn & Grow Sessions
- Hot Links
 - HERO Support
 - BlueTube
 - Phone Directory
 - Hero Support
- Standard Work Instructions / Stand Up Talk
- Electronic Concierge
- Calendar of Upcoming Events



Enhance Your Skills

Capability and Proficiency Team Skills

- Knowledge of Retail and Post Office Operations Policy, Procedures and Programs
- Strong Communication Skills - Orally/Written Format
- Gathers, Evaluates and Analyzes Data
- Ensure Employee Development by Identifying and Implementing Training Needs
- Demonstrated Ability to Work Independently and In Team Setting to Achieve Shared Goals



Upcoming Learn & Grow Sessions

Mobile Delivery Device -MDD Timekeeping
Click-N-Ship G10 Initiative
Package Postage Validator-PPV
Ground Advantage Launch
Pictorial Postmark
Arrow Key Bi-Annual Certification
Continuous Improvement
Informed Visibility Employee Scheduler-
IVES
Access Registration -ARIS Functionality
Sales/Service Retail Diagnostic-SSRD Live
Obliterated Packages and Airline Rejects
..... And Many More!

[Capability & Proficiency Calendar.xlsx \(sharepoint.com\)](#)

CRDO FY23 Supervisor Symposium

The Supervisor Symposium aligns with the Postmaster General's *Delivering for America* plan to invest in our greatest asset, our people, by elevating front-line leadership.

Leadership met with over 5,000 supervisors across the Nation

- Atlanta - January 31st - February 3rd
- Washington, DC - February 7th - February 9th



CRDO FY23 Supervisor Symposium: Tools for Success Informational Session



Atlanta, GA



Washington, DC

CRDO FY23 Supervisor Symposium: General Session



Atlanta, GA



Washington, DC

Training Around the 24-Hour Clock Indicators

F4 & F2
Afternoon / PM
Plays

F4 & F2
Morning
Plays

Safety



Customer
Experience

Operational
Excellence / Daily
Management System

Ethics / Labor

CRDO FY23 Supervisor Symposium: Feedback

“Just got back from DC and it was very informative and inspirational. I learned that majority of our VPs starts as craft employees. It just proves that you can advance as far as you want within our organization.”

“...as a brand new supervisor, I feel the message was brought to me in perfect timing.”

“Listening to the PMG was so powerful.”

“It was soooo motivational and inspirational. I LOVED IT, I learned so much...The change starts with myself I am going to be the change I want to see..”

“The skits were awesome and so spot on! I have worked in both examples of offices.”

"**COMING TOGETHER** is a beginning, *STAYING TOGETHER* is progress, and **WORKING TOGETHER** is success."

– Henry Ford



DELIVERING
FOR **AMERICA**