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JUL 14 2023

July 11, 2023

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

Certified Mail Tracking Number:
7020 3160 0002 0327 5910

Dear Ivan:

This letter is in further reference to the notice dated July 7, 2022 (enclosed), regarding the Customer 360 (C360) application. The Postal Service plans to update the application with an additional display screen through a Computer Telephony Integration (CTI) enhancement.

When a customer calls the 1-800-ASK-USPS helpdesk number, the CTI enhancement will take information provided through the Interactive Voice Response (IVR) system, including the inquiry type, and display it on the agent's computer. The information will assist the agent in knowing how best to respond to the caller. The agent will then be provided several response options to select from based on the information provided by the customer.

The CTI enhancement will initially be tested on the call type, Hold Mail. A group of agents from each call center will begin testing on July 28, the test is anticipated to last two months.

Enclosed is the following training material:

- *Computer Telephony Integration (CTI) Enhancements and C360 Training*

Please contact Dion Mealy at 202-507-0193 if you have any questions concerning this matter.

Sincerely,

A handwritten signature in blue ink, appearing to read "Shannon R. Richardson". The signature is fluid and cursive, with a long horizontal flourish at the end.

Shannon R. Richardson
Director
Contract Administration (APWU)

Enclosures



July 7, 2022

Mr. Edmund A. Carley
President
United Postmasters and Managers
of America
8 Herbert St.
Alexandria, VA 22305-2600

Certified Mail Tracking Number:
7020 3160 0002 0327 0397

Dear Edmund:

As a matter of general interest, the Postal Service is deploying a new, more intuitive user interface for Customer 360 (C360). This interface, called Salesforce Lightning, includes new features and views to assist users in efficiently providing customer service.

Training on the new features and updates within the C360 platform will be made available in HERO from July 25 through August 18. The interface will be updated in C360 starting August 19.

Enclosed on compact disc are the following documents:

- Copy of the training presentation for local post office (LPO) users, and
- Copy of the training presentation for Consumer Affairs employees.

Please contact Dion Mealy at 202-507-0193 if you have any questions concerning this matter.

Sincerely,

A handwritten signature in black ink, appearing to read "Shannon R. Richardson".

Shannon R. Richardson
Director
Contract Administration (APWU)

Enclosure





CTI Enhancement and C360 Objectives

The CTI (Computer Telephony Integration) Enhancements is a Pilot using Call data from Genesys to populate the reason for the call on the Agent screen.

- Pilot call type: **Hold Mail**
- Pilot start date **April 21, 2023**
- Introduce the new C360 tab **CTY/Call Data**
- Demonstrate the **IVR/CTI call connection process**
- Walk through new **C360 CTY/Call Data tab**
- Revisit QSDD **Validate/Verify** process
- **Capture the Why (CTY)** expectations
- Introduce **Service Request Notes picklist/dropdown** menu
- **Parking lot**

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Facilitator Notes

During our time together, these are our objectives.

This pilot will include approximately 90 agents to cover the HOLD mail call type.

Start date, April 21 at the start of your tour. There is no end date scheduled.

Management will monitor the pilot.

There may be adjustments to the pilot as determined by the monitors of the pilot.

C360 CTY/ Call Data tab is new for all agents.

Demo call connection.

Walk through what you will see on the new screen.

Revisit QSDD.

CTY expectations

Picklist menu is new for all agents.

Introduce zoom chat as the parking lot, enter questions in zoom chat.

CTI is the integration of telephones to interact with computers.

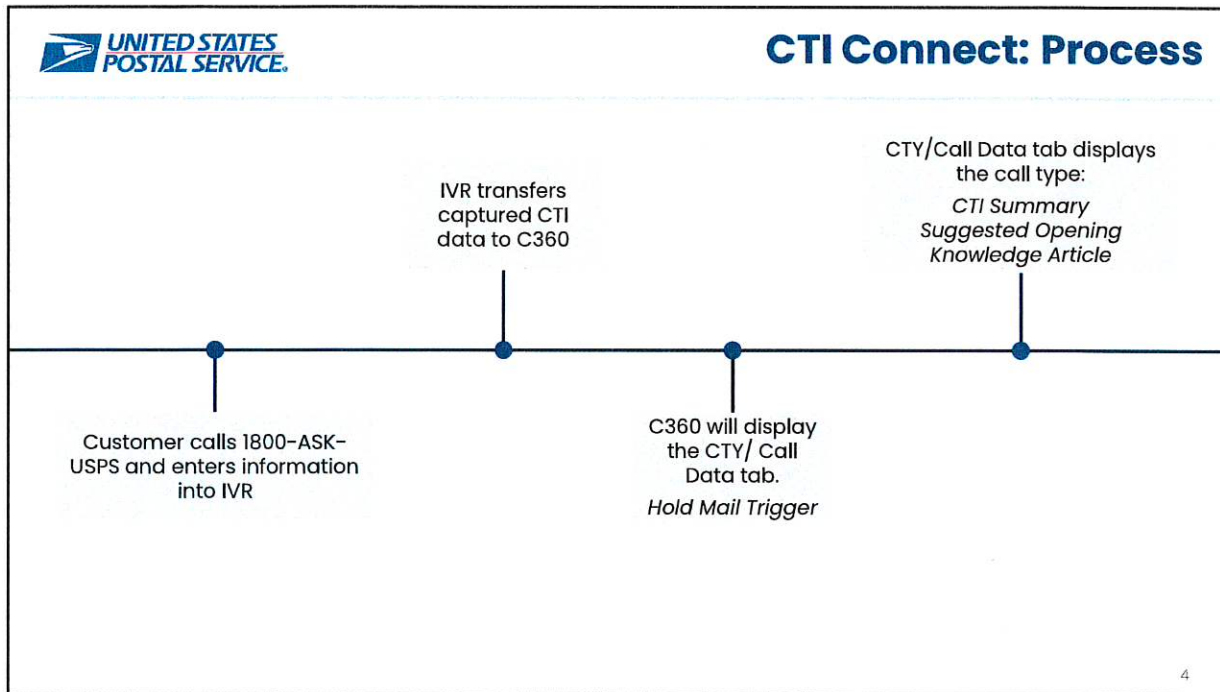
We currently use CTI to capture the following:

- Customer Telephone Number
- Data pre-populating in MyTools (tracking number, hold mail number, redelivery number, etc.)

Benefits of CTI Enhancement:

- The customer data and call type will populate on your screen
- Suggested opening to begin the conversation with the customer
- Relevant knowledge article

Facilitator Notes



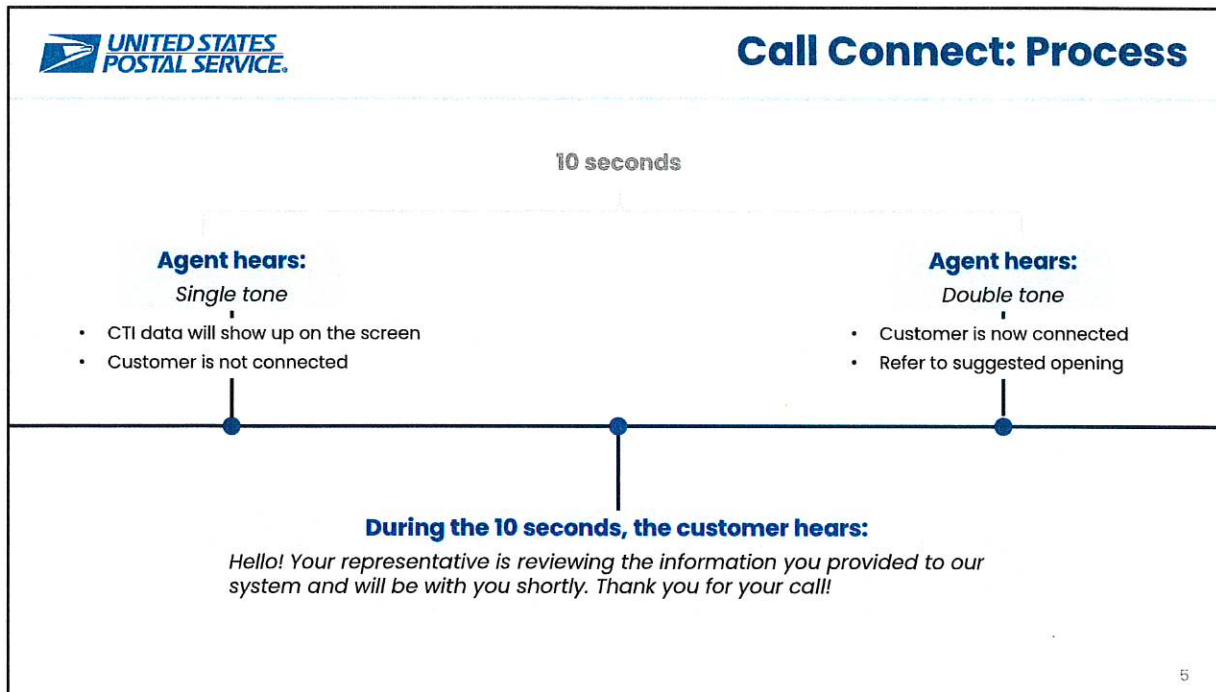
Facilitator Notes:

CTI Connect Process.

The CTI call connect process looks like the timeline below

Understand CTI summary is provided by the customer within the IVR before call drops to an agent

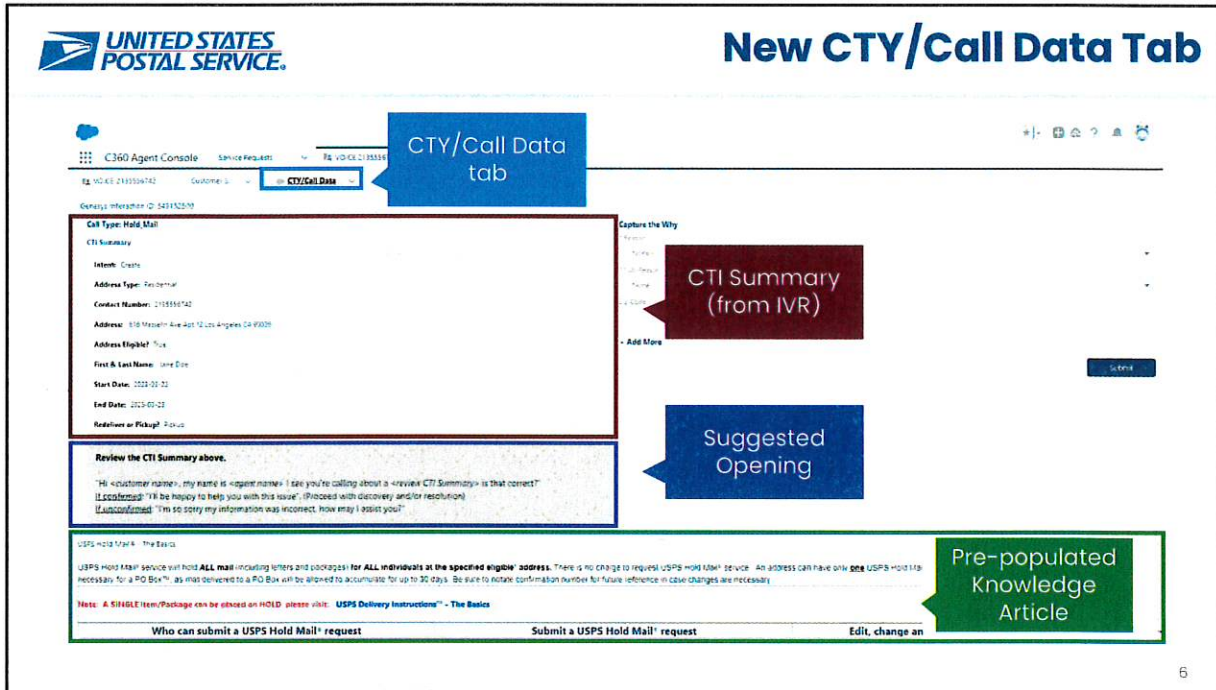
Hold mail is the trigger for the pilot to then populate the new CTY/Data enhancement.



Facilitator Notes:

Call connect process looks like the timeline below

- Agent hears single tone, silence for 10 seconds, and then a double tone which signals that the agent and customer are now connected
- Agent screen will automatically navigate to the 'CTY/Call Data' sub-tab in C360, rather than the Person Account sub-tab
- Customer hears captured message for 10 seconds, then the call is connected to an agent
- This is your 10 seconds to read the data on the screen



Facilitator Notes:

This is the new screen that will populate during this pilot.

We will break this down.

Click: The Interaction tab will be renamed CTY/ Call Data.

- Calls without CTI Summary will continue to focus to the Person Account sub-tab
- Calls with CTI Summary will focus to the CTY/Call Data sub-tab

Click: The CTI summary is what the customer provided within the IVR before the call is dropped into the agent queue.

Click: Suggested Opening: Suggestions to begin the call with that customer.

Reminder: After the two tones!

Click: A pre-populated Knowledge Article The pilot is based on Hold Mail. Therefore, Hold Mail the Basics will be the prepopulated KA.

Important: The CTI pilot is only for Hold Mail. All other call types will NOT populate this data!

UNITED STATES POSTAL SERVICE **Capture the Why**

C360 Agent Console Sim. or Request FA 1000219336742 V000210022222

FA 1000219336742 Customer ID CTY/Call Data Customer ID

Genesis Identifier ID: 541932200

Call Type: Hold Mail

CTI Summary

Intent: Create

Address Type: Residential

Contact Number: 2108581742

Address: 818 Market Ave Apt 12 Los Angeles CA 90028

Address Flag(s): Tax

First & Last Name: Jane Doe

Start Date: 2022-01-22

End Date: 2023-01-22

Deliver or Pickup: Pickup

Review the CTI Summary above.

"Hi customer name, my name is <agent name>. I see you're calling about a <review CTI Summary> is that correct?"
 If confirmed: "I'll be happy to help you with this issue". (Proceed with discovery and/or resolution)
 If not confirmed: "I'm so sorry my information was incorrect, how may I assist you?"

USPS Hold Mail: The Basics

USPS Hold Mail service will hold **ALL mail** (including letters and packages) for **ALL individuals at the specified eligible address**. There is no charge to request USPS Hold Mail® service. An address can have only **one** USPS Hold Mail necessary for a PO Box™, as mail delivered to a PO Box will be allowed to accumulate for up to 30 days. Be sure to include confirmation number for future reference in case changes are necessary.

Note: A SINGLE item/package can be placed on HOLD please visit: USPS Delivery Instructions™ - The Basics

Who can submit a USPS Hold Mail® request Submit a USPS Hold Mail® request Edit, change an

7

Facilitator Notes:

Point to new tab.

CTY will now be found on the right side of the screen.

Includes the reason, sub-reason, and Zip code.

No change in the collection of the data, just the location.

Important: The CTI pilot is only for Hold Mail. All other call types will NOT populate this data! (Additional releases after a successful pilot will add to the call types included)

The customer will hear a message before the call is connected to an Agent



Customer Message



C360 Agent Console

Service Requests | VOICE 2135556742 | VOICE 2102222222

Q: Search

EG VOICE 2135556742 | Customer S... | CTI/Call Data | Knowledge | Customer S...

Genesys Interaction ID: 549152509

Call Type: Hold Mail

CTI Summary

Intent: Create

Address Type: Residential

Contact Number: 2135556742

Address: 616 Maxwell Ave Apt 12 Los Angeles CA 90016

Address Eligible?: True

First & Last Name: Jane Doe

Start Date: 2023-03-12

End Date: 2023-03-21

Redeliver or Pickup?: Indus

Review the CTI Summary above.

"Hi <customer name>, my name is <agent name>. I see you're calling about a <review CTI Summary> is that correct?"
If confirmed: "I'll be happy to help you with this issue". (Proceed with discovery and/or resolution)
If unconfirmed: "I'm so sorry my information was incorrect, how may I assist you?"

Facilitator Notes:

- The 10 seconds of silence between tones will exist for both English and Spanish callers that come through the IVR with a Hold Mail request
- The recording shows the call connect sounds that you can expect, as an agent
- You can also hear the recording showing the single and double tone

CTI Enhancement: CTY/Call Data Tab

Facilitator Notes:

- Here's a recording of the CTI Enhancement in its entirety, along with navigating over to the Person Account tab
- Calls without CTI Summary will continue to focus to the Person Account sub-tab
- Calls with CTI Summary will focus to the CTY/Call Data sub-tab
- When calls drop an agent, the experience will be the same for non-CTI Enhancement calls. For calls that trigger the CTI Enhancement interface, the CTY/Call Data tab will populate

UNITED STATES POSTAL SERVICE **CTI Summary**

CSO Agent Console 10:40:12 AM EDT

Call Type: Hold Mail Capture the Why

CTI Summary

Call Type: Hold Mail

CTI Summary

Intent: Create

Address Type: Residential

Contact Number: 2102222222

Address: 1818 Rogers Rd Apt 348 San Antonio TX 78251

Address Eligible?: True

First & Last Name: Tom Bombadil

Start & End Date: 2023-02-08 2023-02-11

Redeliver or Pickup?: Pickup

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Facilitator Notes:

- Next, we will break down the CTI Summary and blow it up to review.
- The information found in the CTI Summary is provided by the customer within the IVR, before the call is transferred to the agent.
- At the top of the CTI Summary section, you will see the Call Type: Hold Mail.
- The customer selected that path in the IVR.

UNITED STATES POSTAL SERVICE.

CTI Summary

Call Type: Hold_Mail

CTI Summary

Intent: Create

Address Type: Residential

Contact Number: 2135556742

Address: 616 Masselin Ave Apt 12 Los Angeles CA 90036

Address Eligible?: True

First & Last Name: Jane Doe

Start Date: 2023-03-22

End Date: 2023-03-23

Redeliver or Pickup?: Pickup

Data customer entered in the IVR:
 Intent
 Address type
 Phone number
 Eligible address
 Customer name
 Dates
 Redeliver/Pickup

Review the CTI Summary above.

"Intent" is the reason why our customer is calling USPS, based on the selections made in the IVR.

You should match it to the Call Type to understand why the customer is calling.

Facilitator Notes:

Slide duration 3 min

- Next, we will break down the CTI Summary and blow it up to review.

The IVR asked these questions after selecting Hold Mail

- **Intent:** The reason why the customer is calling USPS, based on the selections made in the IVR. You should match it to the Call Type to understand why the customer is calling. For the Hold Mail pilot, the intent will either be 'create' or 'status'
- **Address Type:** the customer's address type, either residential or business
- **Contact Number:** the phone number the customer provided the IVR
- **Address:** the address entered in the IVR
- **Address Eligible?:** indicates whether the address is eligible for Hold Mail
- **First & Last Name:** the first and last name the customer provided the IVR

- **Start Date:** the start date for the Hold Mail the customer provided the IVR
- **End Date:** the end date for the Hold Mail the customer provided the IVR
- **Redeliver of Pickup?:** Customer selects redelivery or pickup

UNITED STATES POSTAL SERVICE **Call Opening**

CTM Agent Console 41 62 7 8 9

CTI: Call Data

Suggested call opening

Review the CTI Summary above.

"Hi <customer name>, my name is <agent name>. I see you're calling about a <review CTI Summary> is that correct?"
if confirmed: "I'll be happy to help you with this issue". (Proceed with discovery and/or resolution)
if unconfirmed: "I'm so sorry my information was incorrect, how may I assist you?"

<review CTI summary> is the Call Type and the intent.
 For example, if the call type is 'Hold Mail' and the intent is 'Create', then we know the caller is attempting to create a Hold Mail request in the IVR prior to dropping to an Agent.

Facilitator Notes:

Slide duration 2 min

After the 10 seconds to review your screen and the two tones, agents have suggested call openings.

If the customer confirms the Hold mail selection, then continue.

If the customer states another reason for their call, offer unconfirmed call opening.



Pre-Populated Knowledge Article

The screenshot displays a USPS Knowledge Article page. At the top left is the USPS logo. The main header reads "Pre-Populated Knowledge Article". Below this, there's a navigation bar with "KMS Agent Console" and search filters. The article content is pre-populated with customer data: "Call Type: Hold Mail", "CTI Summary", "Name: John", "Address Type: Residential", "Contact Number: 212345678", "Address: 175 Madison Ave Apt 1100 New York, NY 10017", "First Last Name: John Doe", "Year Born: 2010/12/12", "E-mail: john.doe@usps.com", and "Facilitator Publish: John". A "Review the CTI Summary above" section contains a message: "Hi customer, when my name is visible online, I see you're calling about a USPS Hold Mail request. It's important to help you with this issue. Please visit the USPS website to learn more about USPS Hold Mail requests. If you need more information, please call 1-800-ASK-USPS." Below this is a table of related articles:

Who can submit a USPS Hold Mail request	Submit a USPS Hold Mail request	
Who can submit a USPS Hold Mail request	Submit a USPS Hold Mail request	
Authorize someone else to pick up USPS Hold Mail	How long can I place mail on hold?	How do I get my mail when my USPS Hold Mail request ends?
Pick up USPS Hold Mail earlier than date requested	USPS Hold Mail did not start or stop as requested	How will a Change of Address (COA) affect USPS Hold Mail?
Why can't USPS verify my identity online and how can I submit a USPS Hold Mail request?	Technical assistance for online USPS Hold Mail service	

At the bottom of the article, there are buttons for "Online" and "In Person or by Phone". A small note at the bottom right of the article says: "Please visit USPS Hold Mail Service to submit a request online. You also need to sign into My USPS. Please visit your local Post Office to submit and complete your Hold Mail request. Please visit USPS Hold Mail Service to learn more about USPS Hold Mail requests." The page number "13" is visible in the bottom right corner of the screenshot.

Facilitator Notes:

- For the CTI Enhancement, a pre-populated Knowledge Article will reflect based on the data the customer provided within the IVR
- If the pre-populated Knowledge Article is not the most appropriate article to assist the customer, you will need to search for the appropriate Knowledge Article to answer the customer's inquiry



Confirm CTI Information is Correct/Validate

QSDD Reminder

Call Type: Hold_Mail

CTI Summary

Intent: Create

Address Type: Residential

Contact Number: 2102222222

Address: 11750 Wilshire Blvd Los Angeles CA 90025

Address Eligible? True

First & Last Name: Jane Doe

Start Date: 2023-03-14

End Date: 2023-03-27

Redeliver or Pickup? Pickup

Validate the information provided in the CTI Summary with the customer to ensure it is correct.

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Facilitator Notes:

- There are times where the information provided by the customer in the IVR is incorrect
- You will need to validate the customer's information to ensure it is correct
- The purpose of the CTI Enhancement is to not make our customers DO NOT repeat information they've already provided, especially since the CTI Summary information has already been entered by the customer within the IVR
 - It is okay for you to state information and have the customer confirm accuracy
 - You can validate the address without saying the whole address (example: I see your Hold Mail request is for 11750 Wilshire Blvd, is that correct?)
- The requirements in ensuring the information is accurate is the same without having the customer confirm each line in the CTI Summary is correct
 - When you need to use the pre-populated information, you need to validate it

Using suggested call opening

Example 1:

Call Type: Hold Mail

CTI Summary

Intent: Create

Address Type: Residential

Contact Number: 2102222222

Address: 11750 Wilshire Blvd Los Angeles CA 90025

Address Eligible? True

First & Last Name: Jane Doe

Start Date: 2023-03-14

End Date: 2023-03-27

Redeliver or Pickup? Pickup

Customer is calling about a Hold Mail request

Customer's name is available

"Hi <customer name>, my name is <agent name>. I see you're calling about a <review CTI Summary>. Is that correct?"

15

Facilitator Notes:

- Let's take a look at a real example
- In this example, we can see from the CTI summary that the customer is calling about a Hold Mail request.
- We can also see in the First & Last Name section that the customer's name was provided to the IVR.
- From this information, you can use the following greeting:
 1. "Hi <customer name>, my name is <agent name>. I see you're calling about creating a hold mail. Is that correct?"

- If some information is missing, you can use a more general greeting such as: “I see you’re calling about Hold Mail, is that correct?” **Customer Confirms** “I’ll be happy to help you with your issue.” We will talk about how to handle calls where information is missing in the CTI summary in more detail later.

Activity: Provide a call opening for complete CTI data

Call Type: Hold_Mail

CTI Summary

Intent: Create

Address Type: Residential

Contact Number: 4105556823

Address: 3113 W Marshall St. Apt. C Richmond VA 23230

Address Eligible? True

First & Last Name: Elaine Green

Start Date: 2023-04-03

End Date: 2023-04-06

Redeliver or Pickup? Pickup

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Facilitator Notes:

- Let's use what we just learned to complete the activity. How would you greet a customer based on the below CTI Summary?

Trainer Note:

- Opening should be concise, identify the intent



Activity: Call Opening

Activity: Choose the best option for complete call data opening
Put your answer in the chat

A

Hi Elaine, my name is <agent name>. I see that you're calling about creating a Hold Mail request.

B

Hi, I see you are calling about a Hold Mail.

C

Hi Elaine, my name is <agent name>. I see that you're calling about modifying a Hold Mail request for 3113 W. Marshall St., Apt. C, Richmond Virginia for February 8 – February 11.

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Facilitator Notes:

Based on the CTI Summary on the last slide, choose the best option.

Allow agents to put their answers in the chat.

Click to reveal correct Answer: A

A greets the customer by their name provided in the CTI and references the fact the customer is calling about creating a Hold Mail request. This information was provided in the CTI summary.

B – B does not provide enough information regarding the customer's request and does not greet the customer by their name. B also does not have the agent provide their name.

C – C provides too much information.

Using suggested call opening

Example 2:

Call Type: Hold Mail

CTI Summary

Intent: Create

Address Type: Residential

Contact Number: 2102222222

Address: 1818 Rogers Rd Apt 348 San Antonio TX 78251

Address Eligible? True

First & Last Name:

Start & End Date: 2023-02-08 2023-02-11

Redeliver or Pickup? Pickup

Customer is calling about a Hold Mail request

Customer's name is unavailable/hard to pronounce

"Hi, my name is <agent name>. I see you're calling about Hold Mail. To better assist you, may I have your name?"

Customer provides name

"Thank you <customer name>, I'll be happy to help you with this issue."

18

Facilitator Notes:

- Let's take a look at another example.
- In this example, we can see that the customer is calling about a Hold Mail request.
- We can also see that the customer did not provide their First and Last Name, as this section is blank in the CTI summary.
- Because of this, you should say:
 - "Hi, my name is <agent name>. I see you're calling about Hold Mail. To better assist you, may I have your name? "
 - **Customer provides name**
 - "Thank you <customer name>, I'll be happy to help you with this issue."



Activity: Call Opening, Name Missing

Activity: Provide a call opening for the missing data

Call Type: Hold_Mail

CTI Summary

Intent: Create

Address Type: Residential

Contact Number: 8085558923

Address: 901 Piikoi St Honolulu HI 96814

Address Eligible? True

First & Last Name:

Start Date: 2023-03-24

End Date: 2023-03-27

Redeliver or Pickup? Pickup

19

Facilitator Notes:

- Let's use what we just learned to complete the activity. How would you greet a customer based on the below CTI Summary?



Activity: Call Opening, Name Missing

Activity: Choose the best for missing call data
Put your answer in the chat

A

Hi Jane, my name is <agent name>. I see that you're calling about a Hold Mail. How may I help you?

B

Hi, I don't see your name on my screen. Please give it to me.

C

Hi, my name is <agent name>. I see you are calling about a Hold Mail. To better assist you, may I have your name?

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Facilitator Notes:

Based on the CTI Summary on the last slide, choose the best option.

Allow agents to put their answers in the chat.

Click to reveal correct Answer: C

Customer's calling for a different call type

Example 3:

Call Type: Hold_Mail

Customer states they are calling about a different call type

CTI Summary

Intent: Create

Address Type: Residential

Contact Number: 2102222222

Address: 3321 S Bowman Rd Apt. 2B Little Rock AR 72211

Address Eligible? True

First & Last Name: Arthur Beach

Start & End Date: 2023-02-08 2023-02-11

Redeliver or Pickup? Pickup

"I apologize, my information was incorrect. How may I assist you?"

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Facilitator Notes:

- Let's take a look at an example.
- In this example, CTI states that the customer is calling about a Hold Mail request, however the customer tells you that they are calling about a different call type, such as a Package Pickup.
- When this happens, you should say "I apologize, my information was incorrect. How may I assist you?".



Activity: Validate and Verify Address

Activity: Provide next steps for addresses that do not match

Call Type: Hold_Mail

CTI Summary

Intent: Create

Address Type: Residential

Contact Number: 2102222222

Address: 1818 Rogers Rd Apt 348 San Antonio TX 78251

Address Eligible? True

First & Last Name: Tom Bombadil

Start & End Date: 2023-02-08 2023-02-11

Redeliver or Pickup? Pickup

Customer Information

Customer Language Preference
English

Account Name

Tom Bombadil

Customer Type

Residential

Business Name

USPS Account Username

Preferred Communication Method

Phone

Phone

(210) 222-2222

Phone Ext.

Mobile

Email

tom@invalid.com

Preferred Phone Number

Phone

Address Information

Address (Physical Location)

14111 VANCE JACKSON RD

SAN ANTONIO, TEXAS 782...

UNITED STATES

Other Address

UNITED STATES

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Facilitator Notes:

- Let's use what we just learned to complete the activity. On the call, the customer references a different address than what is provided in the CTI summary. How would you greet a customer based on the below CTI Summary?
- Ask probing questions to determine what is happening (why the CTI Summary, the most updated information, may not match what's occurring within the Person Account)



Activity: Validate and Verify Address

Activity: Choose the best option for incorrect data
Put your answer in the chat

A

What address is correct?

B

The address I see on my screen is different. What address should I be using then?

C

I apologize, my information was incorrect. How may I assist you?

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Facilitator Notes:

Based on the CTI Summary on the last slide, choose the best option.

Allow agents to put their answers in the chat.

Click to reveal correct Answer: C



Validate and Verify, Intent Status

Customer's calling for a different call type

Example 4:

Call Type: Hold_Mail

CTI Summary

Intent: Status

CONF #:

CONF Validation: False

Resume Date Passed: False

Experiencing Issue? False

Modify/Cancel: Modify

Reason for Call: Need to change hold mail

Customer intent is
'Status'

The request is to
modify an existing
Hold Mail

"I see you're calling about modifying a Hold Mail, is that correct?"

Customer confirms

"I'll be happy to help you with your concern."

Agent proceeds with discovery and resolution

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Facilitator Notes:

- Let's take a look at an example.
- In this example, CTI states that the customer is calling about a Hold Mail with an intent of 'Status'.
 - For all calls with an intent of 'Status', data provided through the IVR will require the support of MyTools by using the confirmation number, or you'll need to ask discovery questions.
 - This call can still be customized, leveraging the 'Reason for Call' and "Modify/Cancel" options to better see what data the customer provided in the IVR before the call has reached you
- To help this customer, you will first need to get the customer's name, then you will need to confirm the purpose of the call and gain insight into the details of the existing Hold Mail request

Activity: After greeting the customer and confirming the call intent, what would you do?

Genesys Interaction ID: 5060873387

Call Type: Hold_Mail

CTI Summary

Intent: Status

CONF #:

CONF Validation: False

Resume Date Passed: False

Experiencing Issue? False

Modify/Cancel: Modify

Reason for Call: Need to change hold mail

25

Facilitator Notes:

- Let's use what we just learned to complete the activity. How would you assist the customer? Trainer Note:
 - As an agent, you have already greeted the customer, gathered the customer's name, and identified the call intent is accurate. Now what do you do?

Activity: After greeting the customer and confirming the call intent, what would you do?
Put your answer in the chat.

A

Direct the customer to
usps.com

B

Ask discovery questions to
collect information and use
MyTools to support the
customer

C

Apologize for having
inaccurate information, and
ask how you can assist the
customer

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Facilitator Notes:

Based on the CTI Summary on the last slide, choose the best option.

Allow agents to put their answers in the chat.

Click to reveal correct Answer: B

After you've identified the call intent, you'll want to ask any relevant discovery questions and use MyTools to help support the customer

A – We should not direct the customer to usps.com to handle their modify Hold Mail request when we can assist them on the call

C – The customer has already verified call intent, so apologizing and stating you have inaccurate information would not help further the conversation

CTI Summary

Intent: Create

Address Type: Recipient

Contact Number: 213356742

Address: 818 10456th Ave apt 12 Los Angeles CA 90018

Address (Editable) * Yes

First & Last Name: Jane Doe

Start Date: 2022-03-02

End Date: 2022-03-03

Redivert or Pickup? * No/Yes

Review the CTI Summary above.

*Hi <customer name>, my name is <agent name> I see you're calling about a <review CTI Summary> is that correct?
 If confirmed: "I'll be happy to help you with this issue". (Proceed with discovery and/or resolution)
 If unconfirmed: "I'm so sorry my information was incorrect, how may I assist you?"

Capture the Why

Reason *

Sub-Reason *

Zip Code *

+ Add More

Submit

Facilitator Notes:

- Capture the Why is required for every call type, once the caller intent is verified
- CTY will reflect on the CTY/Call Data tab
- For this visual, we see where CTY is placed for call types that are part of CTI Enhancement. There is no change to the current CTY process.
 - Located on right-hand side of the screen
 - Mandatory fields for reason and sub-reason, and ability to add zip code
 - We recommend you add in the zip code

The screenshot displays the 'Capture the Why' interface within the C360 Agent Console. At the top left is the United States Postal Service logo. The main header reads 'Capture the Why'. Below this, the console shows 'C360 Agent Console' with navigation options for 'Service Requests', 'VOICE 2135556742', and 'VOICE 2102222222'. A search bar is also present. The central focus is a form titled 'Capture the Why' with the following fields:

- Reason: * Reason (dropdown menu)
- Sub-Reason: * Sub-Reason (dropdown menu)
- Zip Code: Zip Code (text input)
- Buttons: + Add More and Submit

A blue callout box with a pointer highlights the form, containing the text 'Capture the Why'.

Facilitator Notes:

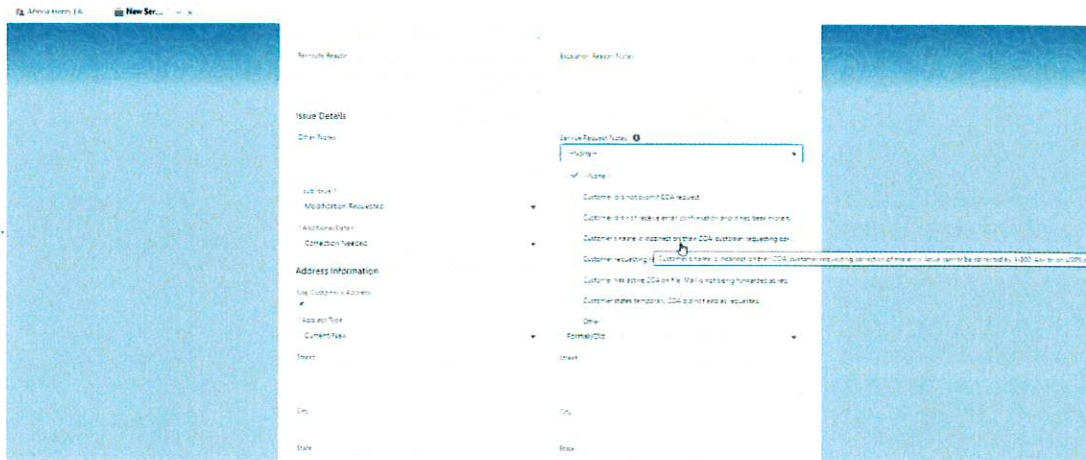
- For calls that are not part of the CTI Enhancement, CTY will still reflect on the CTY/Call Data tab
 - CTY contains the same fields:
 - Located on the screen
 - Mandatory fields for reason and sub-reason, and ability to add zip code
 - We recommend you fill in zip code

Capture the Why

Facilitator Notes:

- Here's a recording of the Capture the Why process in C360, which will be the same process for calls that do and do not trigger the CTI Enhancement

To save you time, Service Request Notes picklist has been added to C360 with common reasons why our customers create Service Requests

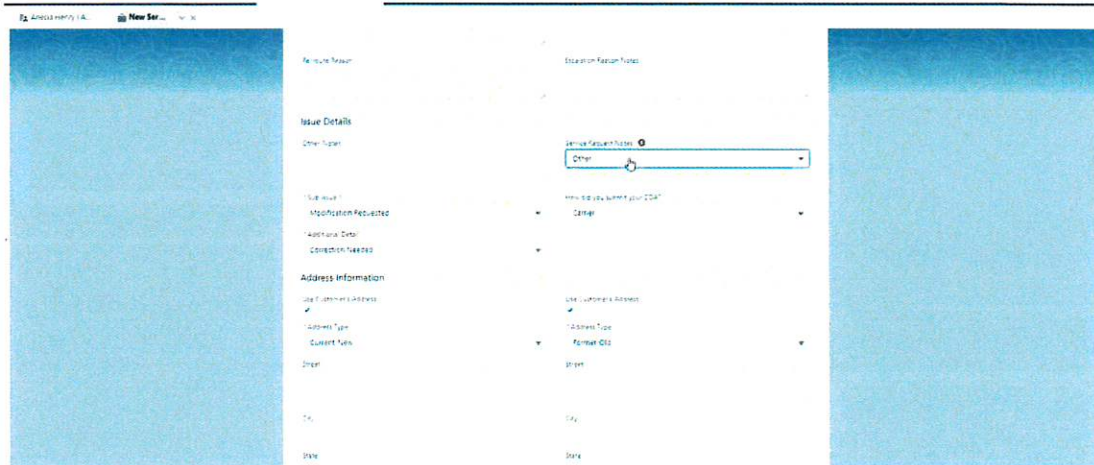


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Facilitator Notes:

- To reduce time spent creating a Service Request, you will now select common SR reasons from the “Service Request Notes” picklist, saving you time from having to manually write out details to common SR reasons
- The Service Request Notes picklist is located on the SR details page under the “Issue Details” section
- When submitting a Service Request, you will need to select the correct Service Request notes and sub-issue that accurately captures the customer’s concern
- Please reference the article “Service Talks” to read the applicable service talk

When "Other" is selected, you will be required to submit a concise explanation within the "Other/Notes" field



The screenshot displays a web form for a service request. On the left, there is a sidebar with sections: 'Request Status', 'Issue Details', 'Address Information', and 'Other'. The 'Issue Details' section includes 'Other Notes', 'What issue?', 'Application Requested', 'Additional Info', and 'Correction Needed'. The 'Address Information' section includes 'Use Customer's Address', 'Address Type', 'Current Type', 'Street', 'City', 'State', and 'Zip'. The main form area is titled 'Situation Reason Notes' and features a dropdown menu for 'Service Request Notes' with 'Other' selected. Below the dropdown is a text input field with the placeholder text 'How do you submit your COA?'. Other fields in the main form include 'Use Customer's Address', 'Address Type', 'Remark ID', 'Street', 'City', 'State', and 'Zip'.

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Facilitator Notes:

- When "Other" is selected from the Service Request Notes picklist, you will be required to submit a concise explanation within the "Other/Notes" field
- You are also able to submit additional "Other/Notes" details in addition to selecting a Service Request Notes picklist option
- Notes must follow current guidelines for the "Other/Notes" field as detailed in article Quality: Service Request Escalation and Guidelines



Service Request Notes

Facilitator Notes:

- Here's a recording of the Service Request Notes picklist in C360
- Indicate that for other picklist options besides "Other", adding in notes in the "Other/Notes" section is not mandatory



Activity: Service Request "Other/Notes"

Activity: Type your answer in the chat

A customer calls with this issue to stop USPS flat tubs/apple crates from being left behind in an apartment lobby. The carrier does not pick up flat tubs/apple crates despite notes left by residents on the box saying, "please remove".

How would you summarize this customer concern in the "Other/Notes" box?



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Facilitator Notes:

"Flat tubs being left in lobby – need to be removed"

The CTI (Computer Telephony Integration) Enhancements is a Pilot using Call data from Genesys to populate the reason for the call on the Agent screen.

- Pilot call type: **Hold Mail**
- Pilot start date **April 21, 2023**
- Reviewed the new C360 tab **CTY/Call Data**
- Listened to the **call connection process**
- Walked through the new **CTY/Call Data provided by the customer**
- Revisited QSDD **Validate/Verify** process
- **Capture the Why (CTY)** expectations
- Introduced the **Service Request Notes picklist/dropdown** menu

Facilitator Notes

This pilot will include approximately 90 agents to cover the HOLD mail call type.

There is no end date scheduled.

Management will monitor the pilot.

There may be adjustments to the pilot as determined by the monitors of the pilot.