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
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,

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
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!

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.

Small Business
March 25, 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,

[Signature]

Debra E. Mills
Manager
Labor Relations Policies and Programs

Enclosures
Standard Work Instructions:
Customer Connect Lead Cards in the Mobile Delivery Device (MDD)

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

Updated on:
3-15-2021

Version 1

Identify potential customers

Select the Lead Entry option on the MDD

Complete MDD entry of customer information

Provide information to management and/or carrier coordinator

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

Select Lead Entry Option on the MDD
- From the main screen select “Lead Card Entry”
  - Press “U” or
  - Scroll to option “U”

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

Provide information to management and/or carrier coordinator
- Notify coordinator/management if a lead(s) was entered
- Communicate and feedback on process

Reasons for Key Points

- Generate new revenue
- Increase brand awareness

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

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