UNITED STATES POSTAL SERVICE

RECEIVED

August 25, 2020   AUG 3 1 2020

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

Certified Mail Tracking Number:
7019 2280 0001 7461 0918

Dear Brian:

This notice is in further reference to the Postal Service's notice dated February 11 (enclosed), regarding its plan to test a concept which would make available to customers the option to communicate with Customer Care Agents through text messaging.

As previously stated, customers using the Interactive Voice Response (IVR) system from a mobile device will be offered the choice to communicate with Tier 2 Customer Care Agents via text messaging for select event codes. The agents will utilize a desktop application to interact with customers electing this option. The purpose of this test is to evaluate the ability to improve service, efficiency, and allow customers to receive communications based on their preference.

The Enterprise Customer Care (eCC) Short Message Service (SMS) proof of concept is scheduled to begin the week of September 14 in Wichita, Kansas for a duration of six weeks. Agent training will begin no sooner than September 8.

Enclosed on compact disc (CD) are the following training materials for this proof of concept.

- Facilitator Guide eCC SMS Proof of Concept Lead Agent Training
- eCC SMS Proof of Concept Lead Agent Training
- Facilitator Guide eCC SMS Proof of Concept Agent Training
- eCC SMS Proof of Concept Agent Training
- Orientation for Virtual Instructor Led Training (VILT)

Please contact April Cutchember at 240-321-4768 if there are any questions.

Sincerely,

Rickey R. Dean
Manager
Contract Administration (APWU)

Enclosures

(CA2020-46)

UNITED STATES POSTAL SERVICE

February 11, 2020

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

Certified Mail Tracking Number:
7018 0360 0001 6256 6298

Dear Brian:

As a matter of general interest, the Postal Service is planning to test a concept which would make available to customers the option to communicate with Customer Care Agents through text messaging.

During the test, customers using the Interactive Voice Response (IVR) system from a mobile device will be offered the choice to communicate with Tier 2 Customer Care Agents via text messaging. The agents will utilize a desktop application to interact with customers electing this option. The purpose of this test is to evaluate the ability to improve service, efficiency, and allow customers to receive communications based on their preference.

The test is scheduled to begin on April 30 in Wichita, KS. Training is currently being developed for Customer Care Agents on use of this application.

If there are any questions, please contact April Cutchember at extension 6612.

Sincerely,

Rickey R. Dean
Manager
Contract Administration (APWU)

(CA2020-46)

08/2020

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Customer Care Center

Orientation for Virtual Instructor Led Training (VILT)

For Experienced Agents

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Training Daily Sign In			
Time	**Program**	**Activities**	**WDE Status**
8:00 - 8:10	Shift Prep	**Log in to WDE Production** During this time open WFM Check your schedule, then close Check emails, then close Read Announcements in C360	Not Ready Shift Prep
8:10 - 10:00	Training Lessons	Be engaged. Participate in Activities	Not Ready Training
10:00 - 10:15	AM Break	Set meeting to Mute Do Not Log out of any programs	Not Ready Break
10:15 - 12:00	Training Lessons		Not Ready Training
12:00 - 12:30	Lunch		Not Ready Lunch
12:30 - 2:30	Training Lessons		Not Ready Training
2:30 - 2:45	PM Break		Not Ready Break
2:45 - 4:25	Training Lessons		Not Ready Training
4:25 - 4:30	End of Shift	Close all programs Shut down computer Do not set to Sleep or Lock	Not Ready Break

Training:

- Respect other people's opinions and questions.

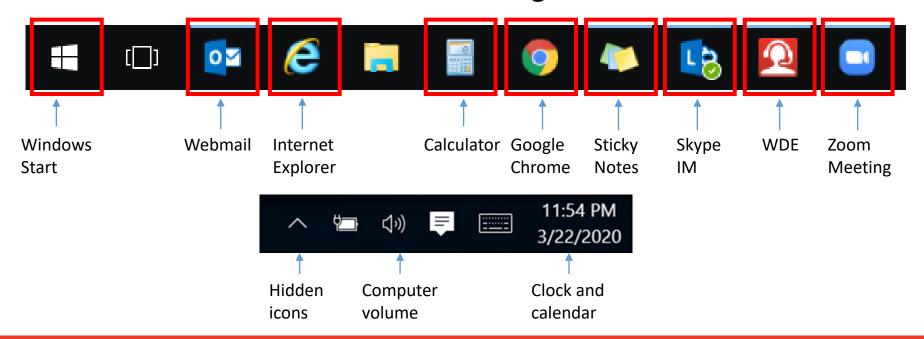- Act courteously, listen, and participate.

Agent:

- Be present online.

- Be on time for start of day, breaks and lunch.

- Put in an honest day's work.

- Create a positive customer experience.

- Be courteous and professional.

- Use a headset to reduce noise.

- Everyday you will be required to sign into Workspace Desktop Edition (WDE).

- Your attendance and timeliness will be monitored in WDE by your Supervisor.

- Any concerns about attendance, leave and absence should be discussed with your Supervisor.

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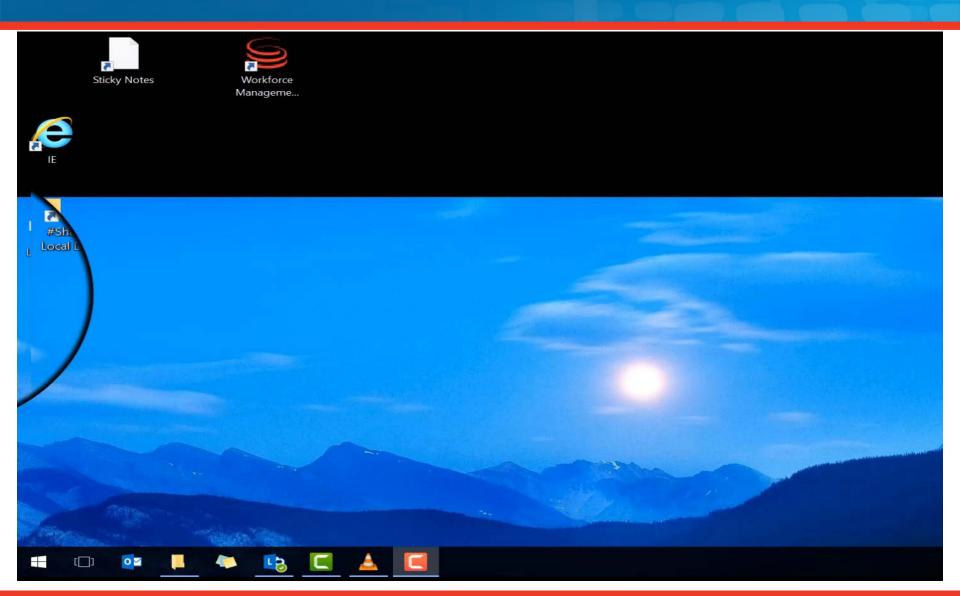
- The taskbar is located on the bottom of your screen.

- Open applications appear in your taskbar.

- Pin frequently used applications to the taskbar for easy access while assisting customers.

- We will use the task bar for training.

Windows Start | Webmail | Internet Explorer | Calculator | Google Chrome | Sticky Notes | Skype IM | WDE | Zoom Meeting

Hidden icons | Computer volume | Clock and calendar
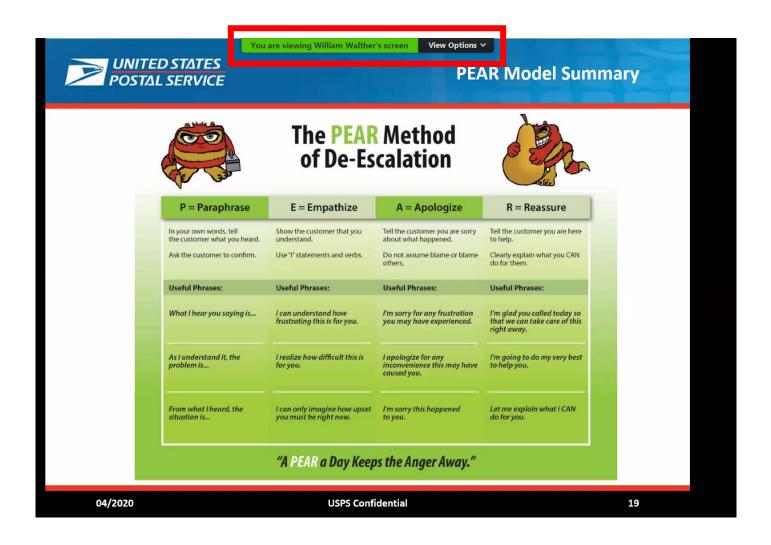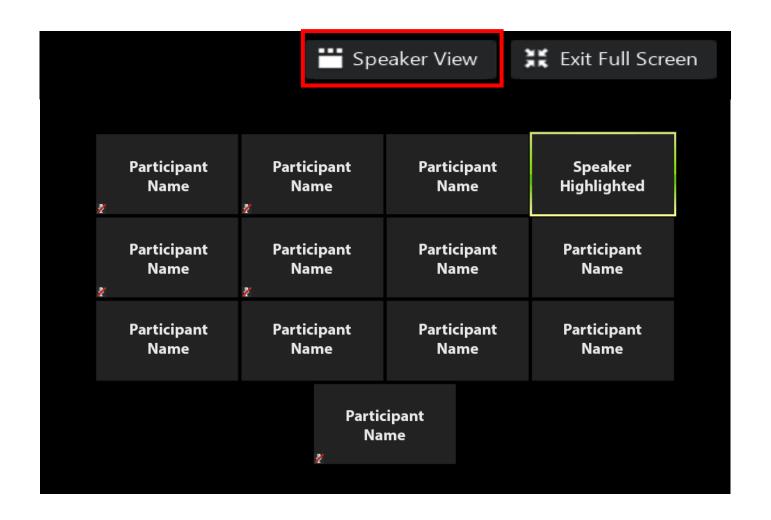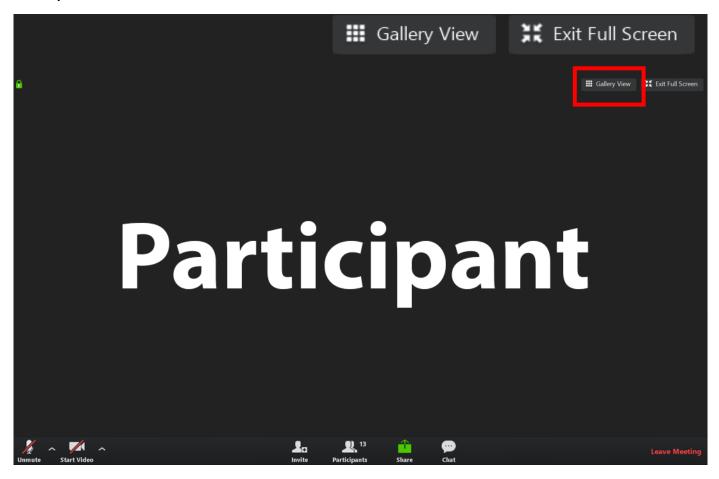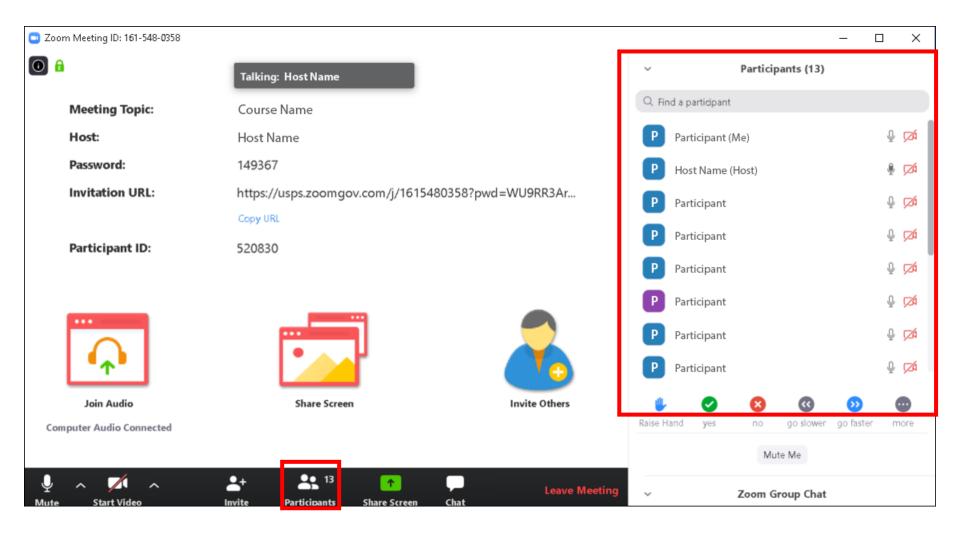
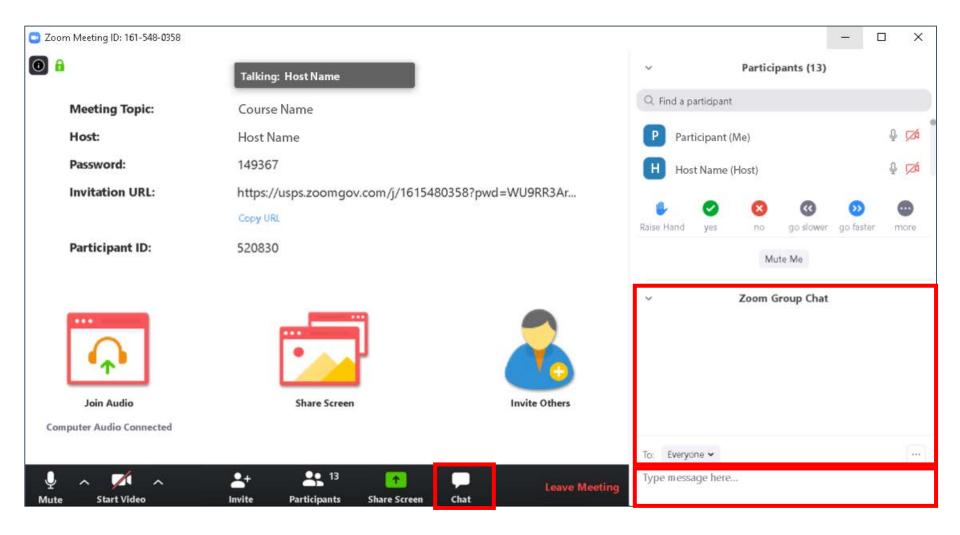Speaker View – Only person speaking will show. Click Gallery View again to return to Gallery View.

1. Point at your ACEID in the Participant list

2. Selecting the Rename button

3. Type your name

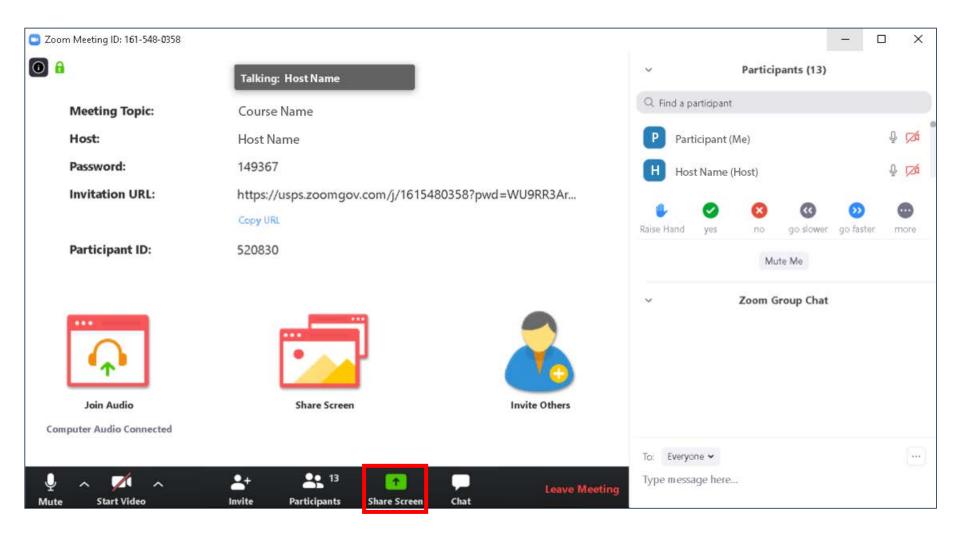4. Select the check box for Remember my name for future meetings
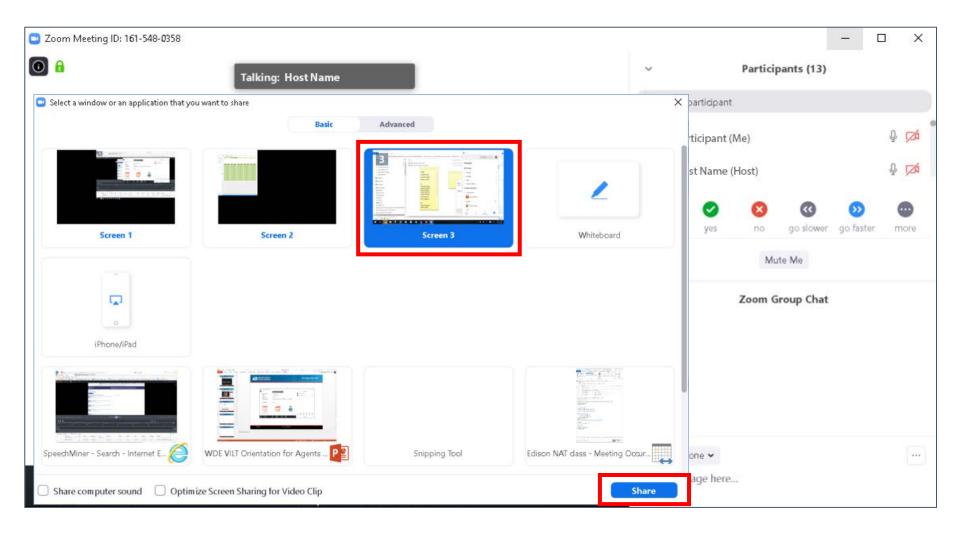
5. Select the OK button.
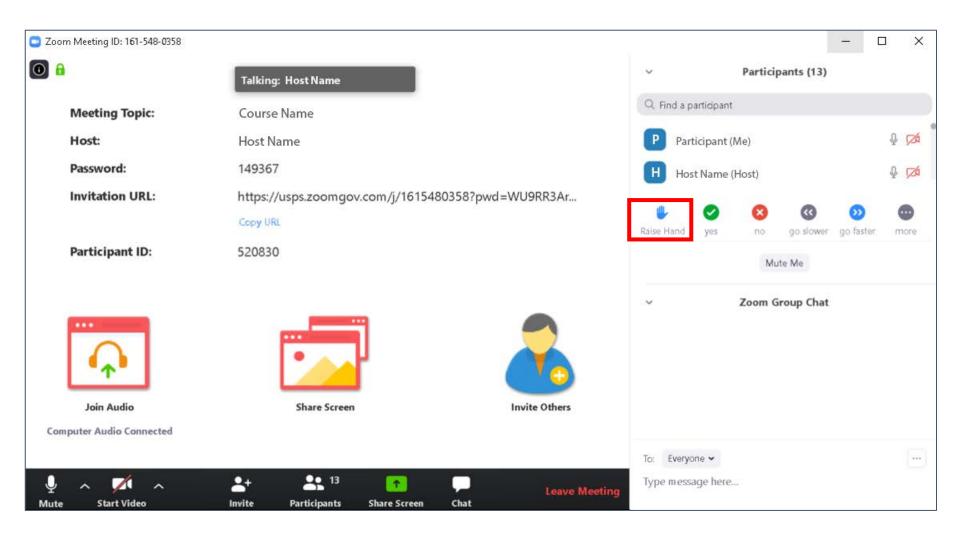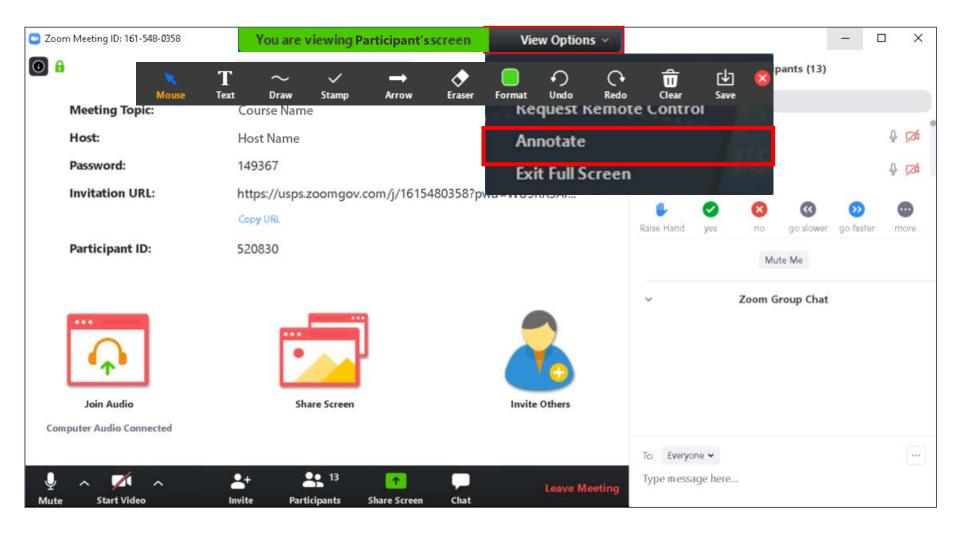
- Select the View Options

- Select Annotate

- Select a stamp

- Click on the screen to place the stamp

- Select the Clear button to remove the stamp

- Select the Text button

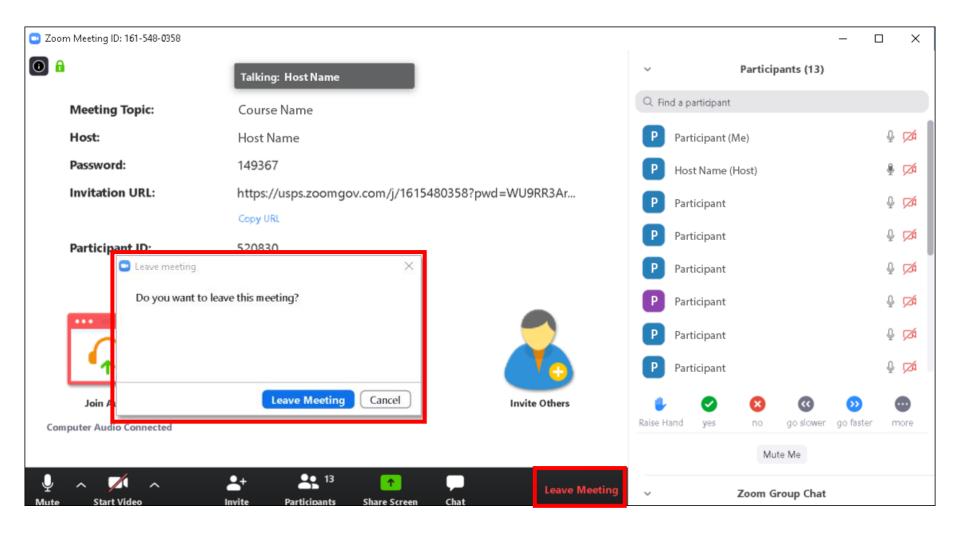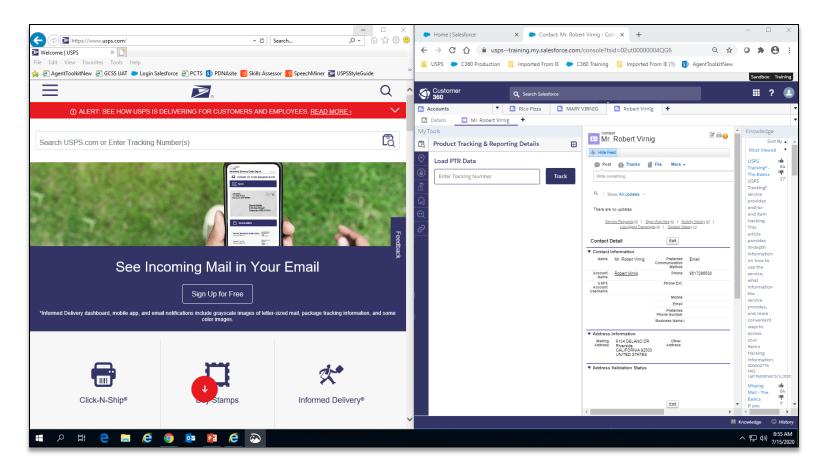- Click on the screen and type your name

- Use headphones for a more clear voice without an echo. Use headphones instead of the computer speaker keep conversations private.

- Mute your mic. To keep background noise to a minimum and avoid distractions for others, click the mute button whenever not speaking.

- Hide the video. Turn off the video feed.

- Running slow? Close unneeded apps to keep Zoom optimally functioning.

- Use the Raise Hand button to speak.

- Use the Chat feature to ask questions or make comments silently.

- Sign out. Remember to "leave the meeting" when the session is finished at the end of the day.

1. **Select title bar of first window**
2. **Windows Logo Key + Left Arrow Key**

1. **Select title bar of second window**
2. **Windows Logo Key + Right Arrow Key**

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Activity

1. Open the C60 training environment in Chrome

2. Open USPS.com in internet explorer

3. Click on the title bar of the USPS.com window and then press **Windows Logo Key + Left Arrow**

4. Click on the title bar of the C360 window and then press **Windows Logo Key + Right Arrow**

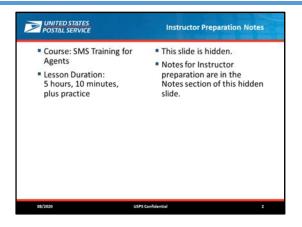5. The screen should be evenly split with USPS.com on the left and C360 on the right.

08/2020

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Customer Care Center

SMS Training for Agents
Proof of Concept

Revision History:
1. Original 08/2020

Instructor Materials
- Zoom
- Supplemental training
    - VILT_Orientation_Experienced_Agents.pptx (Slide 4)
- Video file
    - Handling An SMS Interaction [8:11] (Slide 15)

System Requirements
Zoom
C360
- EvC_30_No Access (Slide 9)
- EvC_55_No Secure Location Available (Slide 9)
- EvC_56_No Authorized Recipient Available (Slide 9)
- EvC_VR_Redelivery Scheduled (Slide 9)
- Quality: SMS Handling (Slides 24 & 56)

WDE SMS CAT environment (Slides 63 & 64)

Evaluation
- This course does not have an evaluation.

Unique Considerations for This Course
For this course in particular, be sure to keep the following in mind:
- The intended audience for this course includes the Wichita Agents, Lead Agents, Quality Analysts, and Supervisors who will be taking part in the SMS Proof of Concept.
- Lead Agents and Supervisors have supplemental courses that will be completed after this course.
- Quality Analysts will NOT be completing a specialized SMS training. Anything Quality-specific regarding tools or processes will be trained or dealt with by Quality leadership.
- This course assumes that the Agents are experienced in Tier 1 calls and situations.
- Trainees must have two screens (laptop screen + external monitor). Monitor must have been tested

and verified to be working prior to training.
- Trainees must also have external keyboard and mouse.
- Trainees will NOT have individual logins to the CAT/Training environment.
- There is no "nesting" component for this training. Instead, this course ends in an extended practice session that will be facilitated in a "fishbowl" fashion. Trainees will remotely control the trainer's computer that will be logged into the SMS CAT environment. See the practice slide at the end of the course for details.

Confidential Information
Information in this guide and within the USPS applications and services is confidential and is intended solely for authorized employees. This confidential information should not be used for any other purpose.

Trademarked Items
USPS and all related/supporting marks are all trademarks owned by USPS. Any trademarked product name mentioned in this guide is owned by the respective owner company.

Lesson Duration About 5 hours 10 minutes, plus practice
Slide Duration 2 minutes

Do
Read the learning objectives on the slide.

Slide Duration 60 minutes

Do
Open and present the companion presentation called "Orientation for Virtual Instructor Led Training (VILT)".
When you're finished, return to this presentation.

Say
This lesson is roughly organized in the order you'll be doing the tasks. We're going to cover a lot in a short time, so if you have questions that will be answered later in this presentation, we'll add those to the parking lot and address them later. If you have questions that won't be covered in this training, we'll parking log those, too, and get an answer back to you sometime after this training session.

This training is scheduled to take two days. Today we'll train the tasks you need to do for SMS. After that we'll do a demo and practice. Tomorrow, we'll spend the whole day on practice. The day after that you will start taking live calls.

This training doesn't have nesting.

Slide Duration 3 mins

Do

Provide an introduction to SMS as a Channel and the Proof of Concept by reading the text on the slide.

Slide Duration 4 mins

Do
Read the text on the slide

Do
Click for animation
Explain that these agents have been selected to test whether SMS as a support channel can meet the needs of our customers.

Do
Click for animation.

Say
This Proof of Concept is a limited period to test out the SMS solution and find out what methods and processes work best.
If we're successful, we might offer the SMS solution to more customers and for more Agents to work.
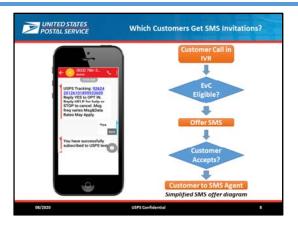
Slide Duration 3 minutes

Do

Use this slide to provide an overview of what we'll cover in this course.
Tell the agents that we'll use slides like this one to keep track of where we are in the training.

Slide Duration 5 minutes

Say
During this Proof of Concept period, we're limiting how many agents work on this effort and how many customers will be offered SMS.

In order for a customer to receive an invitation to try the SMS feature,
- must be using a smartphone, such as an Android or iPhone.
- must have entered their tracking number into the IVR.
- system automatically retrieves the latest scan, that Event Code must be one of the four that are eligible to receive an offer.

We'll talk about which Event Code (EvC) scans are a part of this Proof of Concept on the next slide.

Upon meeting criteria, they will be invited to try the SMS channel in a recorded message.
If the customer accepts, then customer will be prompted to check for a text message and advised that the call will end.
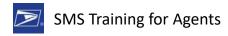Customer will accept the SMS interaction by replying YES.

You may have customers ready immediately, or you may have to wait a few moments for an interaction to appear. This behavior may change throughout the Proof of Concept period.

Slide Duration 6 minutes

Do
Explain that when a tracking call enters the IVR, and when one of these event codes are in the tracking history, and if the customer is using a smartphone, then will be offered an SMS invitation.
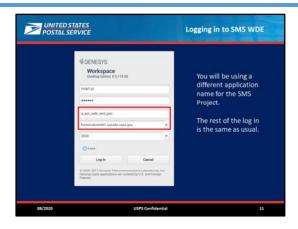
Slide Duration 3 minutes

Do
Use this slide to provide a transition from what we just learned to what we'll cover next.
Use this as an opportunity to answer any questions about the previous slides.
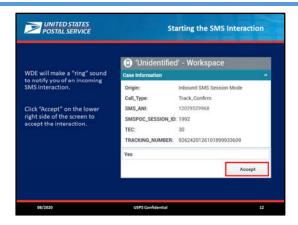
Slide Duration 2 minutes

Say
Logging into SMS WDE for Production will be the same as you currently do for voice, except the application name will be different. We'll use different settings for training, and Lead Agents will have a different application to use to log in, too.

In each case, we'll share the actual login details later.

Slide Duration 3 minutes

Say
When SMS WDE decides it's your turn to take an customer's SMS call, you will see a notice on the bottom right of your workstation desktop.

Click the Accept button to start the interaction. If you miss it, it will route to the next available agent.

Slide Duration 3 minutes

Do
Click to show the animated highlight before you read each bullet below. Each highlight will disappear before the next one appears.

1. Statuses, Ready, Not Ready and Log Out will remain at the top.
2. The Interaction Tool bar is located on the top left of the interaction. The customer's cell phone number, the call timer, and the buttons for "Done", "Assist queue", and "SMS Transfers" are in this toolbar.
3. The Contact panel has the call Type, Phone number, Tracking number and the Zip Code
4. Call status: Connected
5. Active SMS Responses and message edit panel. Customer Responses in Active SMS Responses are blue text and have a unique icon. Agent responses are gray text and have an icon of a person in a headset (not pictured here). System messages are also in gray and have a monitor icon next to them. Point to **TIME STAMPS** on right of responses. Warn that Agents are NOT to click on any URLs provided by the customer. Also, Agents should avoid clicking on any other blue text in the Active SMS Responses Pane. They may open unwanted windows or actually call the customer.
6. Disposition panel.
7. Available Standard Responses. This is a pick list of prepared responses to send to the customer. The folder had a drop down where other folders are located for Standard Responses.   Agents can use the Search bar to enter a Key word to search for Standard Responses.
8. When agents select a prepared response, the Response will be previewed in this box to view the details of the message. This is to ensure agent selected the correct response before sending to the customer.

Slide Duration 5 minutes

Do
Direct the Agents to use the Stamp Annotate Tool to select their answers to the questions below. Be sure to clear the agent's annotations before starting the next question.

Q1: Where will the pick list for Standard Responses be located?
Direct Agents to place a Zoom Annotation stamp.
Click to animate the answer.

Q2: Where are the time stamps located?
Direct Agents to place a Zoom Annotation stamp
Click to animate the answer.

Q3: Where can Agents search for Standard Responses?
Direct Agents to place a Zoom Annotation stamp
Click to animate the answer.

Q4: Where are the Disposition Codes?
Direct Agents to place a Zoom Annotation stamp
Click to animate the answer.

Q5: Where can agents preview the selected Standard Response?
Direct Agents to place a Zoom Annotation stamp
Click to animate the answer.

Slide Duration 10 minutes

Say
Let's see what an SMS interaction looks like from start to finish.
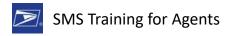
Do
Play the video. (8:11)

Facilitator's Note: Please be sure to do the following when playing videos:

Select **Share Computer Sound** in Zoom.
Select the PPT to Share directly.
When playing a video select **MUTE ALL** in the Participants panel. Bandwidth issues, such as unstable connections, will interfere with video playback.
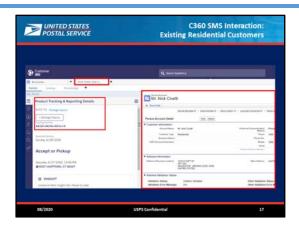If the video playback from the presentation is poor, try playing it directly from the file outside of the presentation.

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What's next?

- How Customers Are Invited to Try SMS
- SMS WDE Sign in and Tool introduction
- C360 Interface
- Selecting Standard Responses
- Disposition Codes
- Reactivated SMS Sessions
- Lead Assist and Lead Escalations
- Multiple Sessions
- Tab Management
- SMS QSDD
- Demo/Practice

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Slide Duration 3 minutes

Do
Use this slide to provide a transition from what we just learned to what we'll cover next.
Use this as an opportunity to answer any questions about the previous slides.

Slide Duration 3 minutes

Say
The Primary Tab in C360 for an SMS Interaction will show "SMS" and then the phone number of the interaction.
- If the customer already has an account in C360 and the system recognized it, it will appear automatically.
- Because the customer already entered their tracking number in the IVR, the PTR tracking details will already appear.

Slide Duration 2 minutes

Do
Emphasize that this looks similar to the Residential accounts.
Point out that "Business Contact" and "Business Account" appear in sub tabs.

Slide Duration 3 minutes

Do

Explain that if the customer DOES NOT already have a C360 person account, then you'll need to create one.

Explain that even though it's not shown here, the customer's tracking number and its tracking details will already appear in the left side of the screen, just as we saw on the previous slide.

Slide Duration 3 minutes

Do
Explain that if the customer's information matches more than one account in C360, then you will need to choose which account to use for this interaction. Click the "Open" button next to the row of the matching account.

Explain that if none of the accounts here match, agents should use the fields on the top of the details sub-tab and the "Search" button to search for the correct account.
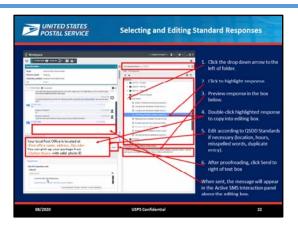
Explain that if the customer needs a new account, agents should use this "Create New Residential Customer" button to make a new C360 account.

Emphasize that agents SHOULD NOT use the global search while working with SMS interactions. SMS WDE and C360 are designed to keep the tabs that belong to a single interaction in sync. If you use the global search to find an account, it will prevent this syncing between the two systems from happening and make it harder for you to keep track of what's going on.

Slide Duration 3 minutes

Do
Use this slide to provide a transition from what we just learned to what we'll cover next.
Use this as an opportunity to answer any questions about the previous slides.

Slide Duration 7 minutes

Do
Read the text on the slide. Click before reading each bullet to show highlights. Previous highlights will disappear as the next one appears.
When you get to point 4, share that agents can select multiple messages to "stack" them, so long as they don't go over the 160 character limit.
When you get to point 5, point out that spelling errors will be indicated by a red wavy line. Agents can right-click on the misspelling and choose the correct spelling.
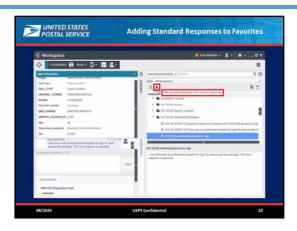
Explain that there are over 170 Standard Responses, organized into about 50 folders. Remind agents that its very important to use the search feature to help find the right standard response.

Transition to talking about searching for the right Standard Response.
Click to show the highlight on Search bar.

Explain that if agents can't find a Standard Response that fits the situation, they can type a non-standard response.
Stress that agents should reach out to their supervisor by IM to let them know that they couldn't find a Standard Response for their interaction. Their supervisor needs to let leadership and the content team know that a new Standard Response might need to be added for everyone to use.
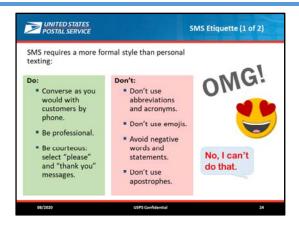
Slide Duration 3 minutes

Do
Tell the agents that they can use the Favorites star to add a highlighted Standard Response to their Favorites list. This is a great place to store frequently-used responses.

Tell the Agents that to see their Favorites list again, Agents need to click on the "View" dropdown and select "Favorites".
Click to reveal the screenshot and highlight.

Facilitator's Note: If agents ask about what happens to Favorited responses when the Standard Responses get updated, you'll have to tell them we don't know. This hasn't been tested yet, and we'll have to find out during the Proof of Concept.

Slide Duration 4 minutes

Say

If you're a texting pro on your iPhone or Android, you're probably familiar with common texting lingo, abbreviations, and emoji. Even if you're not, there are several things to keep in mind when you're working on the SMS Proof of Concept project.

When it's time to do SMS for work, you'll need to use the same formal style you currently use when you're working by voice:

Converse as you would on the phone. Be professional, using full sentences.
Demonstrate courtesy: use "please" and "thank you".
Avoid non-standard and slang abbreviations or acronyms. You *can* use approved abbreviations such as USPS, ASAP, or FAQ. We'll talk about how you'll know the difference in a moment.
Do not use emoji.
Avoid negative words and statements. Do not say things like "I don't know…" or "I can't do that…".
Instead, focus on what you CAN do, "I will help you get this resolved…" or "What I can do is…".
Don't use apostrophes, such as in contractions like "don't". They won't get sent to the customer.

Slide Duration 10 minutes

Facilitator Note: As of this writing, the article is only published in the C360 Production environment. Be sure to point the agents there.

Say
Now, back to abbreviations. While you're helping a customer, he or she may use an abbreviation that you're not familiar with. If that happens, use the SMS Quality article to see if you can find it.

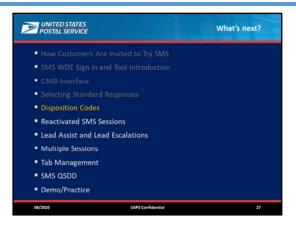If the article doesn't have the abbreviation definition, let your supervisor know so we can get it added to the article.

Slide Duration 2 minutes

Say
System-generated messages are automatically sent to the customer when they subscribe to USPS text.
Each system-generated message is identified by the computer monitor icon.
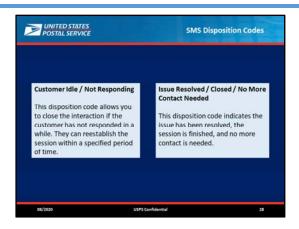
Do
Point out the computer monitor icon and read the messages.
Remind the agents of the other icons. Point out the Agent icon.

Slide Duration 3 minutes

Do
Use this slide to provide a transition from what we just learned to what we'll cover next.
Use this as an opportunity to answer any questions about the previous slides.

Slide Duration 3 minutes

Say
There are two disposition codes for this Proof of Concept effort:
- Customer Idle / Not Responding
- Issue Resolved / Closed / No More Contact Needed

Do
Read the text boxes on the slide.
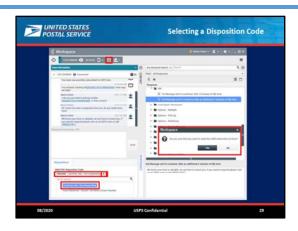
Explain that Capture the Why in C360 will not be used for SMS during the Proof of Concept. Tell agents that if CTY does appear, just close it. It won't cause a problem for SMS.

Explain that after the Agent closes out with the issue resolved, the customer receives an SMS message inviting them to take a survey by clicking on a link.

Explain that if the customer tries to respond after the Agent closes the interaction as "Resolved", they will be redirected to call back.

Explain that if the interaction needs to be escalated, there is no need to select a disposition first.
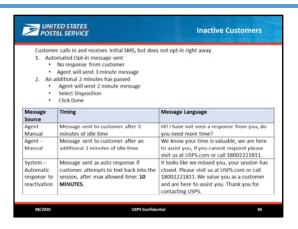
Slide Duration 3 minutes

Say
Dispositioning and closing an interaction is simple:

Do
Click to animate highlights as you read the bullets below. The previous highlight will disappear when the next one appears.
1. Select a disposition code by clicking on it.
2. Verify the code you selected. It will appear above Quick Search box.
3. If you selected the wrong one, you can click the "x" next to it above the Quick Search box to remove it, and select again.
4. When you're sure you have the right one, click the Done button in the interaction bar.
5. A confirmation message appears. Click "Yes" to confirm and close the interaction window, ending the interaction.

You will no longer be able to communicate with the customer once you select and close the interaction.

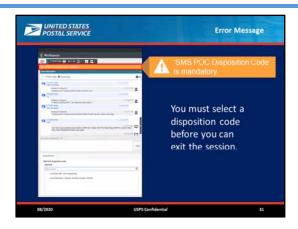**UNITED STATES POSTAL SERVICE**   **Inactive Customers**

Customer calls in and receives initial SMS, but does not opt-in right away
1. Automated Opt-in message sent
   - No response from customer
   - Agent will send 3 minute message
2. An additional 2 minutes has passed
   - Agent will send 2 minute message
   - Select Disposition
   - Click Done

Message Source	Timing	Message Language
Agent - Manual	Message sent to customer after 3 minutes of idle time	Hi! I have not seen a response from you, do you need more time?
Agent - Manual	Message sent to customer after an additional 2 minutes of idle time	We know your time is valuable, we are here to assist you, if you cannot respond please visit us at USPS.com or call 18002221811.
System – Automatic response to reactivation	Message sent as auto response if customer attempts to text back into the session, after max allowed time: **10 MINUTES.**	It looks like we missed you, your session has closed. Please visit us at USPS.com or call 18002221811. We value you as a customer and are here to assist you. Thank you for contacting USPS.

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Slide Duration 4 minutes

Do
Explain that this is what the Agents will do at the start of the Proof of Concept period, but the policy may change later. Your supervisor will notify you of any changes.

Read the information on the screen.

Emphasize that inactive customers are customers who do not respond to initial opt-in message or who stop interacting via SMS after a time.

Tell the agents that they must select the 3 min message and 2 min message accordingly. After sending the second message, agents should select the "Customer Idle/ Not Responding" disposition, and then click "Done".

Tell the agents that they need to use the time stamps on the customers' messages to know when it's time to send these "inactive customer" messages.
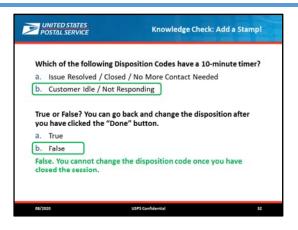
Slide Duration 3 minutes

Say
You must select a disposition code before you can exit the session. If you attempt to click the Done button without selecting a disposition code, you will get an error message.

Do
Click to display the blowup of the error message.

Say
Make sure you choose the correct disposition before closing the interaction; it cannot be changed after the session is done.
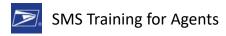
Slide Duration 3 minutes

Do
Direct Agents to use the Annotation Tool to mark their answers.

Click to view each answer.

Slide Duration 3 minutes

Do

Use this slide to provide a transition from what we just learned to what we'll cover next.

Use this as an opportunity to answer any questions about the previous slides.

Slide Duration 3 minutes

Say
If a customer has been unresponsive for a certain period of time you will put them into the "idle" status.
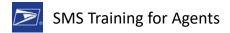
Let's take a look what happens after that.
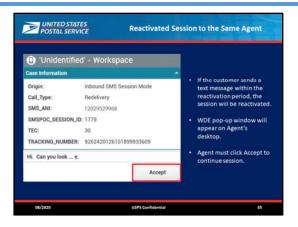
Do
Click to display the rules.

Note that these rules can be changed at any time during the Proof of Concept, even in the middle of a workday.

Remind Agents about keeping an eye on the amount of time a customer is idle (individual SMS timestamps) to see how much time exists between messages.

Slide Duration 3 minutes
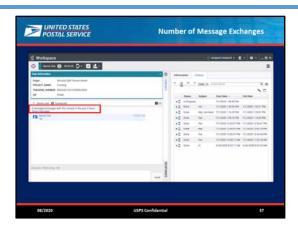
Do
Read the bullets on the slide.

Slide Duration 3 minutes

Do
Read the bullets on the slide.

Explain that when the reactivated interaction is forwarded to the next available agent, the new agent's messages will appear in this golden color.

Slide Duration 3 minutes

Do
Note that the same Agent is "preferenced" when the customer replies; but if that Agent is not available, the interaction will go to a new Agent.

Say
When an Agent – either a new Agent or the same Agent -- receives the reactivated interaction, the previous messages will be available, but hidden.
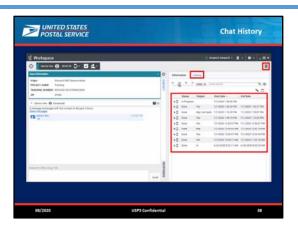
In the left panel, a message details the number of exchanges that occurred within the last two hours. These messages will most likely be the most important to read for a reactivated session.

Do
Read the highlighted message and note that Agents can click "Show Messages" to display the six message exchanges.

Be sure to demonstrate clicking the "Show Messages" button later in the lesson.

Slide Duration 3 minutes

Say
The History list in the right panel displays interactions in the order from most recent to oldest.

Do
Point out that agents can select the History by selecting the hamburger menu in the upper right.
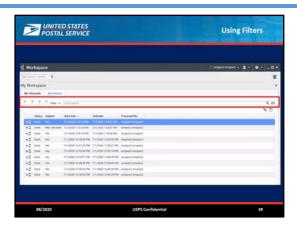
Explain that the History tab will appear is located in the right pane.

Point out the headings: Status, Subject, Start Date, and End Date.

Point out that the history list is ordered from the most recent to the oldest.

In CAT, demonstrate clicking on an item to display the transcript.

Slide Duration 2 minutes
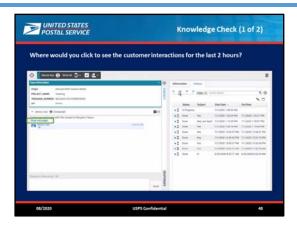
Say
You can use filters to view the interaction history for one day, one week, one month, or all.

Do
In CAT, demonstrate using the slide bar to filter the interactions.

Note that Agents can also use these filters in the middle of calls.

Slide Duration 4 minutes

Do
Instruct Agents to use the annotation tool to select the correct location.

Click to display the correct answer.
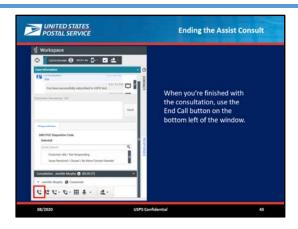
Slide Duration 3 minutes

Do
Use this slide to provide a transition from what we just learned to what we'll cover next.
Use this as an opportunity to answer any questions about the previous slides.

Slide Duration 2 minutes
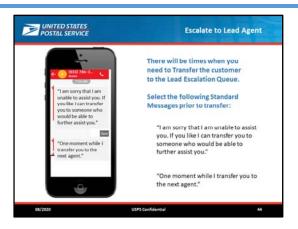
Do
Explain that SMS Agents will use a WDE voice line to contact the Lead Agents for assistance.

Point out the buttons that Agents will click to request assistance from a Lead Agent.

Slide Duration 2 minutes

Do
Explain that when SMS Agents are finished with the voice call to the Lead Agents, they can disconnect the call by using the "End Call" button shown on the slide.

Slide Duration 3 minutes

Do
Explain that for this Proof of Concept, "transfer" and "escalate" are the same.
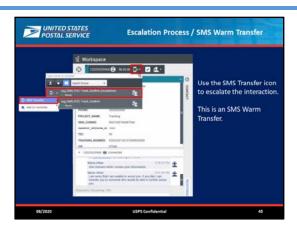
Say
During this Proof of Concept effort, you will transfer customers who are calling about issues **not** covered by the four event codes **and** issues with no standard messages.

However, if the customer is making a simple inquiry such as the hours or contact information for a Post Office, use the standard response for that, making sure to edit the response with the correct details for that location. You can also use free text to answer their question.

If the issue is more complicated and requires a long free text, you should transfer.

The text on the slide are examples of the transition to escalation Standard Messages you can use. There are also others available.

Slide Duration 2 minutes

Say

When you need to escalate an issue to a Lead, you will use the Transfer icon.
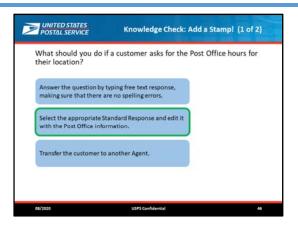
Use the down arrow to the right of the icon to display the list of recipients, then select the appropriate recipient to escalate the interaction. For this Proof of Concept, there is no warm transfer. Be sure to choose the Escalations queue. The escalated interaction will be put into the queue for the next available Lead Agent.

Say

An invitation is sent to the Lead to accept the SMS transfer. If the Lead accepts the interaction-transfer request, the interaction window closes on your desktop and opens on the desktop of the transfer target, the lead agent.

Do

Remind the Lead Agents that they have a separate training that follows this Agent training.

Slide Duration 2 minutes

Do
Instruct Agents to use the annotation tool to answer the question.
After some time, click to show the correct answer: Select the appropriate Standard Response and edit it with the Post Office information.

Tell the agents that at no time should they transfer a customer to another Agent. Agents can only transfer customers to a Lead Agent, under certain circumstances.

Slide Duration 2 minutes

Do
Instruct to use the annotation tool to answer the question.
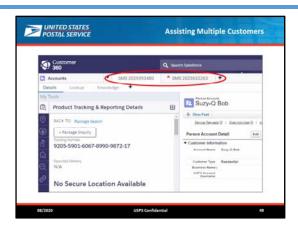
Use the annotation tool to circle the correct answer: the Transfer (phone) icon.

After the activity, click to show the button names and the answer.

Slide Duration 3 minutes

Do
Use this slide to provide a transition from what we just learned to what we'll cover next.
Use this as an opportunity to answer any questions about the previous slides.

Slide Duration 3 minutes

Say
You can assist up to three customers in SMS. That means that you can have up to three tabs open and toggle back and forth between conversations in both C360 and in WDE.

As with a single interaction, you will accept the offers as they appear.

Since the limit is three interactions, the system will not send you offers if you are already handling three interactions.

Slide Duration 2 minutes

Say

When you have multiple sessions in WDE and C360, the tabs are automatically linked. When you click on one customer's interaction in WDE, that same customer's tab in C360 will toggle as active at the same time, and vice versa. This should help you keep track of things as you switch back and forth between the two linked systems.

Note that the interaction on the right in WDE matches the tab on the left in C360.
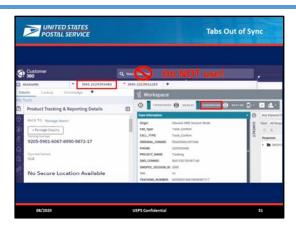
When you're finished with an interaction and close it in WDE, the matching tab in C360 should close, too. Sometimes it doesn't, so you'll have to pay attention and manually close the correct tab.

Do

Tell the agents to NOT quickly click through the tabs in C360.

Warn the agents that it takes a couple of seconds for the two systems to complete the coordinated toggle. If you don't give enough time, the system can get confused as it tries to show the correct WDE tab and the correct C360 tab and could get stuck in a loop.

Tell the agents that the C360 team is aware of this, and may release a fix later in the Proof of Concept.

Tell the agents that we'll talk about what to do if they get stuck in this loop on the next slide.

Slide Duration 4 minutes
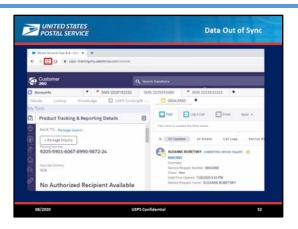
Do
Emphasize to the agents are NOT to use global search to find customer accounts.
Remind the agents that they should look for knowledge articles in the sub-tabs, so they stay matched up with the customer it's related to.

Say
It's possible that the sync between the two systems can be broken. For example, if you use Global Search in C360 **without** using the sub-tabs highlighted on the screen, the connection can be disconnected.

At this point, you can determine how the two tabs match by looking at the tab title in C360. The tab will read "SMS" followed by the telephone number.

In this example, the active WDE interaction reads, "12029393480" and the matching C360 tab reads, "SMS 2029393480".

Slide Duration 3 minutes

Say
We usually use the C360 tab refresh drop down (not pictured here), such as when we're working with Service Requests. We generally avoid using the browser refresh button whenever possible.

Do
Explain that if C360 starts behaving oddly, using the browser refresh button is a quick workaround to try.
Click to show the highlight on the browser refresh button.
Emphasize the difference of the two types of refresh: C360 tab refresh is NOT the same as a browser refresh.
Explain that if either C360 or WDE starts acting oddly, agents should report it to their Supervisor. The Supervisor will create an IT ticket to get awareness of the issue.
Remind the agents that this is a Proof of Concept, and this is how kinks get worked out before a wider release.

Tell the agents that if they do a browser refresh, they'll need to close the C360 tabs manually when the interaction is finished, because the syncing with WDE is broken.

Slide Duration 3 minutes

Say

If you're working with multiple customers and you happen to miss an interaction invitation, the system will automatically put you into a "Ready (Pending)" status. If this happens, the system won't offer you any more SMS interactions until you go back into full ready.

Keep an eye on your status in WDE. If you see the "half green" icon, make sure you go back into "Ready" for SMS.

Your supervisors will help you keep an eye on it.

Slide Duration 2 minutes

Do
Read the text on the slide.
Acknowledge that the image of the status list is larger than normal. It was enlarged to agents can read it.
Explain that this status prevents the system from sending new interactions to the agent.
Tell the agents that they'll use this "Not Ready – Pre-Break" status before lunch, restroom breaks, and the end of the day, too.
Explain that the system's automatic rollover only works for "Pre-Break" to "Break". Agents will have to manually select out of "Pre-Break" to any other status, such as "Lunch" or "RestRoom".
Avoid setting specific time periods for using the "Pre" setting. Tell the agents that their supervisors will give them guidance.

Slide Duration 5 minutes

Facilitator Note: There are two questions for this activity. Agents will use the annotation tool to make their selections. The point of this activity is to reinforce to the agents how the tabs relate between the two systems, whether or not they remain in sync.

Say

Let's say the connection between your tabs in C360 and WDE has been broken and you need to match up the interactions. The image on the top of the slide is a C360 window. The callouts are magnifications of the full phone numbers attached to the tabs. I will display two tab titles from WDE on the bottom of the slide, one at a time. You need to identify the matching one in this C360 screenshot. Use your annotation tool to select the box above the correct tab.

Do

Click for first tab title to appear on the bottom right. Direct Agents to use the annotation tool to place a stamp on the correct tab callout from the top row of tabs.
Answer for first question is the third callout tab on the top row.
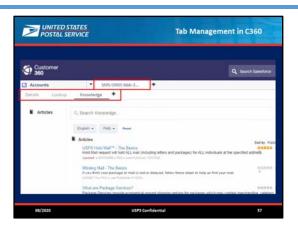
Click for second tab title to appear on the bottom left. (The first tab title will also disappear). Direct Agents to use the annotation tool to place a stamp on the correct tab callout from the top row of tabs.
Answer for second tab is the middle tab callout on the top row.

Slide Duration 3 minutes

Do

Use this slide to provide a transition from what we just learned to what we'll cover next.

Use this as an opportunity to answer any questions about the previous slides.

Slide Duration 4 minutes

Say
While you're communicating with the customer in SMS WDE, you may also need to switch back to C360 to check on things or to create a Service Request. As you do that, you may notice that there is something different here that should make working in C360 easier for the SMS project.
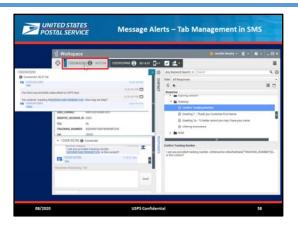
Do
Click to show the highlights on the tabs.
Explain that in addition to the regular tabs you usually use in C360, the SMS Proof of Concept will make more use of sub-tabs to organize the interaction. Agents will be able keep tasks related to a single SMS interaction organized together and stay below the five-tab limits. Searches for Knowledge Articles and other tasks related to that SMS interaction will stay organized below that main tab.
Click to animate Knowledge in the sub tab.
Explain that just like the main tabs, sub tabs also have five-tab limits.

Slide Duration 2 minutes

Say
When a customer responds to a text the SMS interaction tab will flash.

For example, notice that in this image, the agent is messaging with the second customer. We know that because that's the one with the darker interaction bar. If the first customer sends a message, their interaction tab will flash yellow to let you know that the customer is waiting for a response.

Do
Click for animation.
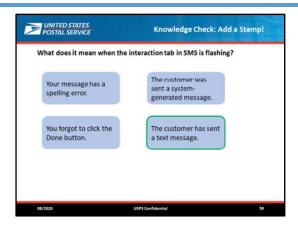
Explain that the flashing will continue until you open the message by clicking the tab **or** roll over the message.

Say
Rolling over the tab enables you to quickly read at the message and stop the flashing. Then you can determine if you need to leave the other interaction to respond.

Do
Click to show rolling over the tab.

Slide Duration 2 minutes
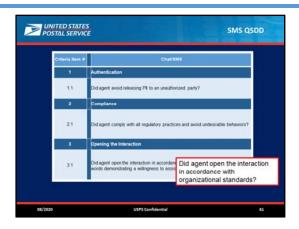
Do
Tell Agents to select the correct answer using the annotation tool.

Click to display the correct answer.

Slide Duration 3 minutes

Do
Use this slide to provide a transition from what we just learned to what we'll cover next.
Use this as an opportunity to answer any questions about the previous slides.

Slide Duration 2 minutes

Say
SMS quality standards have been mapped to the current ECC Quality Scorecard for the Voice channel. The SMS QSDD resembles the Voice QSDD, but adjustments have been made for the text-only interactions.

Here's an example of the SMS QSDD Scorecard.

Do
Read 3.1.
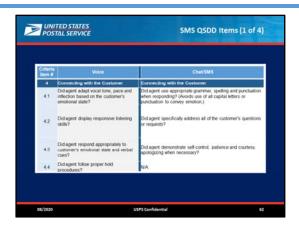
Click to show the corresponding item for the voice QSDD.

Read the voice QSDD item and point out the differences between the two.
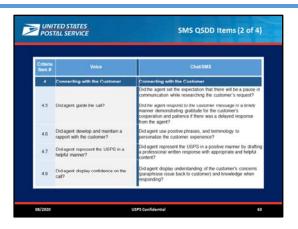
Say
Let's review the rest of the SMS QSDD.

Slide Duration 3 minutes

Do
Have the agents open the **Quality: SMS Handling** knowledge article to read the QSDD as we discuss.
Compare the voice and SMS items. Stress the SMS differences.
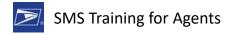
Slide Duration 4 minutes
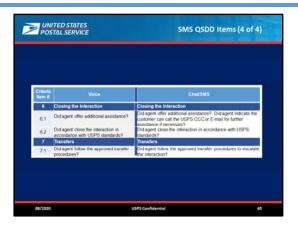
Do
Compare the voice and SMS items. Stress the SMS differences.

Slide Duration 5 minutes

Do
Compare the voice and SMS items. Stress the SMS differences.

Slide Duration 3 minutes

Do
Compare the voice and SMS items. Stress the SMS differences.

Slide Duration 3 minutes

Do
Tell Agents that SMS Interactions will undergo Quality review the same as voice interactions.

Reinforce using Standard Responses. Direct agents to notify their supervisors by IM if they need to use a non-standard response.

Slide Duration 5 minutes

Do
Invite Agents to post questions in Zoom Chat.

Address questions and "parking lot" the questions you cannot answer. Assure Agents that you will find the answers to these questions as soon as you can.

Slide Duration 5 minutes

Do
Use this slide to provide a wrap up of the course before we transition to the Demo and Practice.
If agents have questions that will be answered in the upcoming demo, be sure to note that and demonstrate the answers.
Use this as an opportunity to answer any questions about the previous slides.

Slide Duration 30 minutes

Facilitator's Note: This demonstration will happen in the CAT system. You may need to enlist the help of a co-trainer to help you by acting as the SMS customer. They would be sending live responses using their smartphone so you can reply to them during the demo.

Do
Demonstrate how to do SMS by using the CAT system. Show the C360 steps when they occur, but don't dwell on them. These agents should already know how to use that system.
Demonstrate how Agents can logoff of the SMS channel and login to the Voice channel if WFM or their supervisor needs them to switch tasks.
Make sure to demonstrate each of the panes of the main SMS window and how they work. Especially show the different ways to sort the Standard Responses and how to switch between the alphabetical and label/folder structure.
Show how to hide/show the standard messaging panel (by clicking the vertical bar "Response") so they can restore it if they accidentally hide it.
Show how to access the Chat history.
(If you're training the leads, show how they can find the lead-specific messages in the Lead Agent folder.)
Show how to search for the right Standard Response.
Show how to select a Standard Response to be added to favorites, and then show how to select it from the favorites list again. Tell the agents that there is no way to sort the favorites, so they may want to limit how many they select.
Demonstrate how to select a Standard Response and how to edit the placeholders that require it (such as LPO location and hours).
Show how to use the message timestamps to identify how long it's been since the customer's last response. Stress that this is an important skill for knowing when/if to send the "are you still there?" messages and when to set the interaction to "Idle".

Demonstrate what a reactivated session looks like. Be sure to show the previous messages if they are hidden.

Reinforce using standard messages vs. free text to reduce errors.
Stress that the agents should NOT wait longer than the approved times for customer responses.

Slide Duration (Remainder of training time, including the second day.)

Facilitator Note: The CAT system is not designed for all of the agents to practice individually in a hands-on fashion. Instead, the IT team has requested that the agents practice one at a time by remotely controlling the trainer's session in a "fishbowl" fashion.

While one instructor is facilitating practice, the other trainer should gather the Supervisors or Lead Agents into a breakout room to conduct their training. At the end of that training, they can return to join this fishbowl, or that trainer can keep them in that breakout room and facilitate practice in that environment.

On the second day of practice, you may choose to break up the class into two or more breakout rooms to allow for more agents to practice at a time. Coordinate in Skype Instant Messaging so your SMS interactions don't get mixed up.
Make sure agents get a chance to practice with multiple interactions and using the assist and escalate queues.

Do
Provide an overview of what's going to happen next.
Select an agent and assign control of your screen to him or her.
Create an SMS scenario for them to work, based on the CAT scripts you completed during testing. Encourage them to use as many was to locate the Standard Responses as possible.

Agents who are not actively practicing should be actively watching and providing assistance to the Agent in the hot seat.

Hidden Slide

Facilitator Note: Use the steps on this hidden slide to assign remote control of your screen to an agent and then resume Facilitator control again.

Hidden Slide

Facilitator Note: Use this slide to show how the agents can request remote control of your screen.
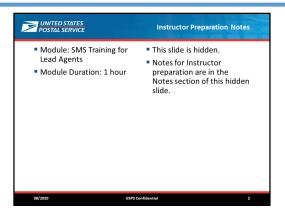
On your side, you'll see a "Grant Control" button. Click that to grant control. Resume Facilitator control by using the instructions on the previous slide.

2020

UNITED STATES POSTAL SERVICE
Customer Care Center

SMS Training for Lead Agents
Proof of Concept

Revision History:
1. Original 08/2020

Instructor Materials
- Laptop

Learner Materials
- Pen or pencil
- Laptop

System Requirements
Zoom

Evaluation
No evaluation will be assigned for the SMS Proof of Concept.

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Lesson Duration 1 hour
Slide Duration X minutes

Facilitator's Note: This slide exists for you to know how this lesson was organized. There is a more "learner friendly" version of topics to be learned elsewhere in this lesson.
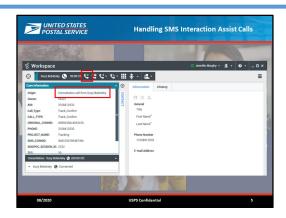
Slide Duration 3 minutes

Say
As you learned, customers will have the opportunity to interact with Agents via SMS. During these interactions, Agents may still come across situations where they need your help in the Assist queue. In addition, these interactions may also result in escalations that you may have to handle directly.

Do
Provide an overview of the SMS Training for Lead Agents topics.

Slide Duration 2 minutes

Say
When an Agent needs your assistance during an SMS interaction, they will contact you via voice as is done currently.

Do
Click one time to play animation.
Point out the Origin information in the highlighted text.
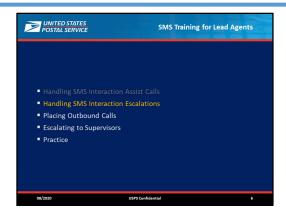
Say
Use your existing resources to answer any questions the Agent may have. Note that you do not have access to the SMS chat history, or to directly message during the consultation.
At the end of the assist call, when you have addressed all of the Agent's questions, disconnect the assist call as is current practice.

Do
Click one time to play animation.

UNITED STATES POSTAL SERVICE	SMS Training for Lead Agents

- Handling SMS Interaction Assist Calls
- Handling SMS Interaction Escalations
- Placing Outbound Calls
- Escalating to Supervisors
- Practice

08/2020   USPS Confidential   6
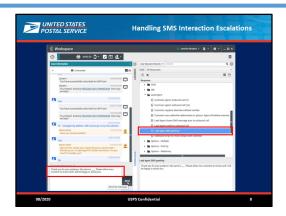
Slide Duration 1 minute

Slide Duration 2 minutes

Say
Like an initial SMS interaction for an Agent, WDE will make a "ring" sound and display an interaction transfer request when an SMS interaction escalation is routed to you.
Select the Accept button to complete the transfer, and the SMS interaction window will display on your desktop.

Slide Duration 3 minutes

Say
The first thing you must do when you receive an escalated interaction is greet the customer and introduce yourself as a Lead Agent. There are standard responses available to make this quicker for you.

Do
Click one time to play animation.
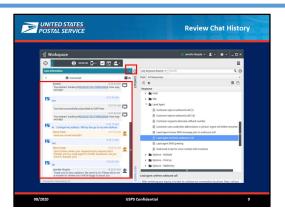
Say
First, be sure to modify the Standard Response to include your name. Also, note that the Lead Agent greeting standard responses asks the customer to allow you a moment to review the chat history. Because there is no opportunity for Agents to communicate the details of the SMS interaction as there is with a warm voice transfer, you must take a moment to quickly review the chat history **after** you greet the customer.

Do
Emphasize that Leads must first acknowledge the customer before spending time reviewing the chat history.
Remind Agents that the font color will change to gold as this is a transferred SMS interaction.

Slide Duration 3 minutes

Say
The SMS interaction chat history will be forwarded to you in the Active SMS panel during the escalation transfer.
Recall that to expand the panel, you can collapse the Contact panel by clicking the arrow.

Do
Click one time to display 2nd highlight box.
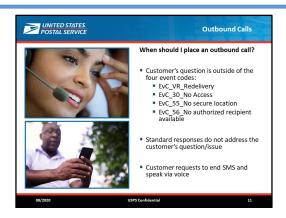
Emphasize that while reviewing the SMS chat history is helpful, Agents should NOT solely rely on these communications. Instead, Agents should verify all past actions (e.g., service requests) in C360.

Say
After you've reviewed the chat history, continue the SMS interaction as discussed in the SMS training. When you have finished assisting the customer, remember you must disposition the SMS interaction.

Slide Duration 1 minute

Slide Duration 3 minutes
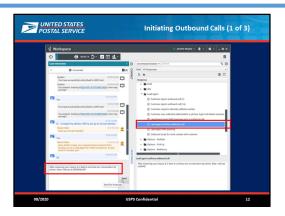
Say
There may be instances when you must transition an SMS interaction to a voice call to fully address customers questions.

Do
Click one time to display each bullet (3 main bullets)

Facilitator Note:
Emphasize that outbound calls must only be placed for current SMS interactions, and only Lead Agents may place outbound calls. Lead Agents should not advise Agents to place an outbound call.

Slide Duration 2 minutes
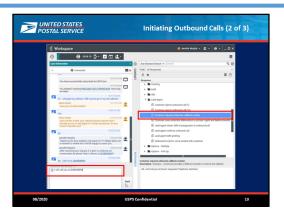
Say
There are standard responses available when either a customer requests to transition to voice, or if you identify a need to initiate a voice call.

If you identify a need to place an outbound call to the customer, select the following standard response to ask the customer's permission to call them.

Do
Click one time to play animation.

Slide Duration 2 minutes
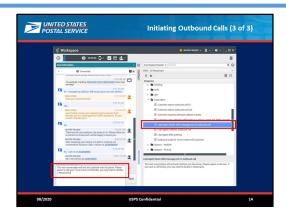
Say
Keep in mind, some customers may ask that you call them at a different number. There is also a standard response for these situations.

Do
Click one time to play animation.

Slide Duration 2 minutes

Say
If the customer requests the outbound call, you may modify either of the previous Standard Responses to verify the number to call the customer before placing the call.

Once the customer has agreed for you to call the customer, end the SMS chat using another standard response.

Do
Click one time to play animation.

Slide Duration 3 minutes

Do
Review the steps to place an outbound call.
Click one time to display the highlights for each step.

Say
Notice that the WDE screen grays out when you're placing an outbound call. If you need to go back, click anywhere in the gray area to continue.

Slide Duration 2 minutes

Say
If you attempt to place a call to the customer, but the customer does not answer the phone, select the following two standard responses before ending the SMS interaction.

Do
Click one time to play animation.

Say
If you do not receive any further communication, disposition the SMS using the Customer Idle option and end the interaction.

Slide Duration 3 minutes

Say
If the customer does answer your outbound call, you must greet them again. But, if you think about our standard opening script, you can see how it doesn't work when you're placing the call and have already been communicating with a customer.

When you have to place an outbound call, you must use this opening script instead.
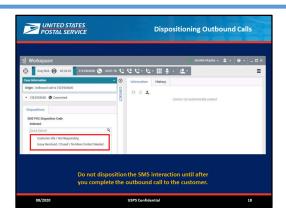
Do
Click one time to play animation.
Ask for a participant to read the call opening script for outbound calls.

Say
After the opening script, continue the call following current practices.

Slide Duration 3 minutes
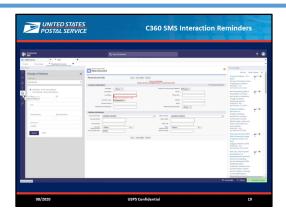
Say
Remember that you must still disposition the SMS interaction. This is done when you have completed the outbound call to the customer.

Do
Click one time to play the animation.

Slide Duration 2 minutes

Say
Remember not to open a new primary tab. You still can access your C360 My Tools from the subtabs to continue assisting customers.

Also, do not use the Global Search feature.

Slide Duration 1 minute

UNITED STATES POSTAL SERVICE — Escalating SMS Interactions to Supervisors

- Supervisors do not have access to SMS
- Use standard responses to request permission to have Supervisor call back
- If on a voice call, follow current call escalation procedures

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Slide Duration 3 minutes
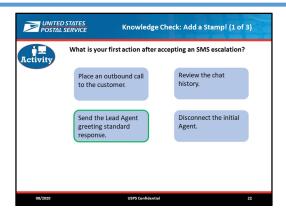
Say
If you are interacting with a customer via SMS, keep in mind that Supervisors do not have SMS access, so you cannot forward an SMS interaction to a Supervisor. In these cases, use your standard responses to request permission to have a Supervisor call the customer back and end the interaction accordingly.

If a customer requests to speak to a Supervisor when you have placed an outbound call, you will follow current call escalation procedures.
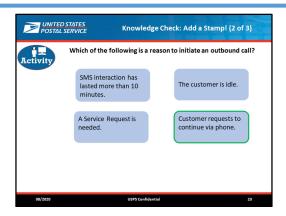
Slide Duration 2 minutes

Do
Ask Agents to use the Zoom annotation tool to select the area of the image to initiate an outbound call.

Click one time to display correct answer.
Clear participant annotations.

Slide Duration 2 minutes
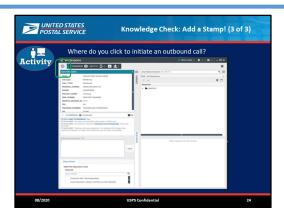
Do
Tell Agents to select the correct answer using the annotation tool.

Click one time to display correct answer.
Clear participant annotations.

Slide Duration 3 minutes

Do
Ask Agents to use the Zoom annotation tool to select the area of the image to initiate an outbound call.

Click one time to display correct answer.
Clear participant annotations.

Slide Duration 5 minutes

Do
Invite Agents to post questions in Zoom Chat.

Address questions and "parking lot" the questions you cannot answer. Ensure Agents you will find the answers to these questions as soon as you can.

Slide Duration 5 minutes

Do
Review the topics covered in this module before continuing to the practice session.

Slide Duration (Remainder of training time, including the second day.)

Facilitator Note: The CAT system is not designed for all of the agents to practice individually in a hands-on fashion. Instead, the IT team has requested that the agents practice one at a time by remotely controlling the trainer's session in a "fishbowl" fashion.

At the end of the Lead Agent/Supervisor training, join the in-progress fishbowl practice, or keep them in the Lead Agent Training breakout room and facilitate practice in this separate environment.

On the second day of practice, you may choose to break up the class into two or more breakout rooms to allow for more agents to practice at a time. Coordinate in Skype Instant Messaging so your SMS interactions don't get mixed up. Make sure agents get a chance to practice with multiple interactions and using the assist and escalate queues.

Do
Provide an overview of what's going to happen next.
Select an agent and assign control of your screen to him or her.
Create an SMS scenario for them to work, based on the CAT scripts you completed during testing.
Encourage them to use as many was to locate the Standard Responses as possible.

Agents who are not actively practicing should be actively watching and providing assistance to the Agent in the hot seat.

UNITED STATES
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Customer Care Center

SMS Training for Lead Agents

Proof of Concept

- Handling SMS Interaction Assist Calls
- Handling SMS Interaction Escalations
- Placing Outbound Calls
- Escalating to Supervisors
- Practice

WDE will make a "ring" sound to notify you of an incoming SMS interaction.

Click "Accept" on the lower right side of the screen to accept the interaction.

'Unidentified' - Workspace

Case Information

Origin:	Inbound SMS Session Mode
Call_Type:	Track_Confirm
SMS_ANI:	12029529968
SMSPOC_SESSION_ID:	1992
TEC:	30
TRACKING_NUMBER:	9262420126101899933609

Yes

Accept
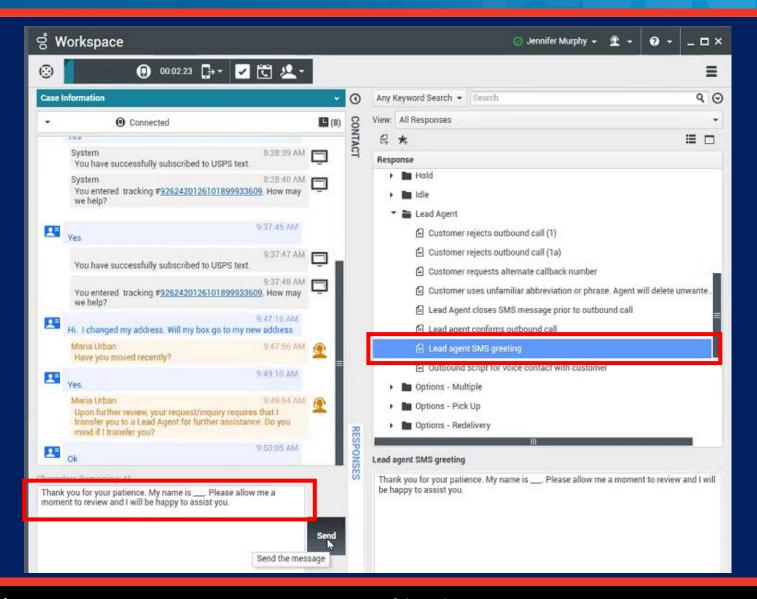
- Handling SMS Interaction Assist Calls
- Handling SMS Interaction Escalations
- Placing Outbound Calls
- Escalating to Supervisors
- Practice

When should I place an outbound call?

- Customer's question is outside of the four event codes:
    - EvC_VR_Redelivery
    - EvC_30_No Access
    - EvC_55_No secure location
    - EvC_56_No authorized recipient available

- Standard responses do not address the customer's question/issue

- Customer requests to end SMS and speak via voice
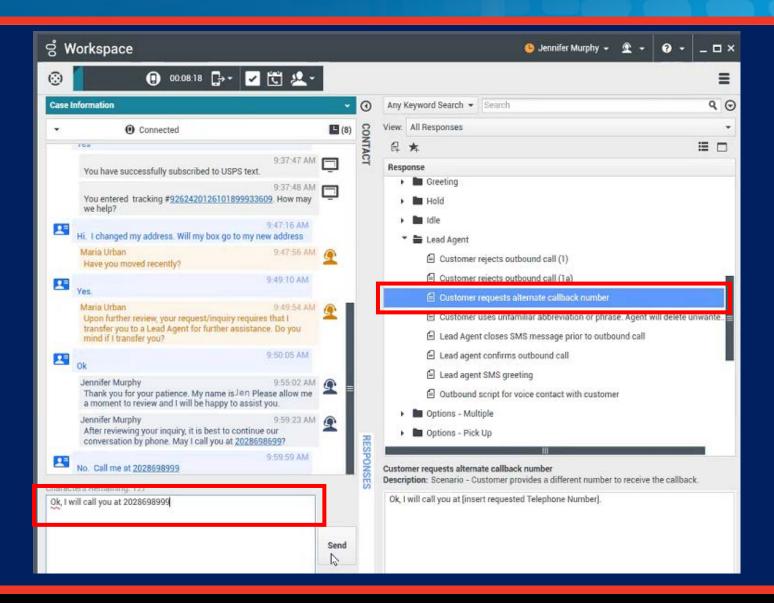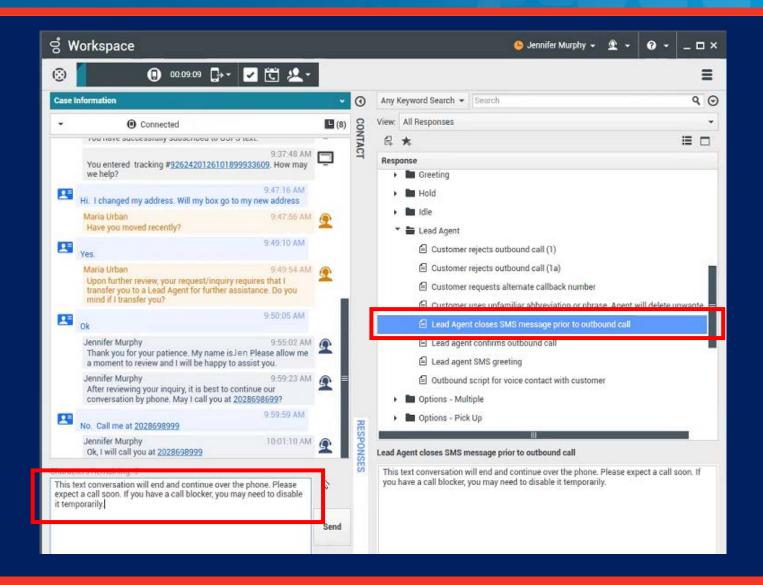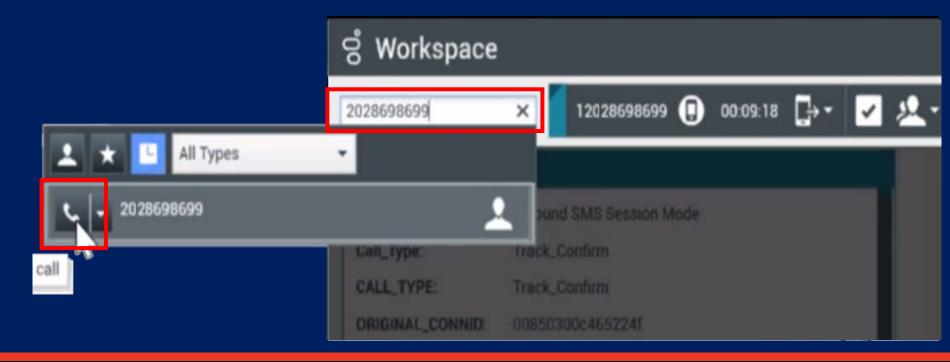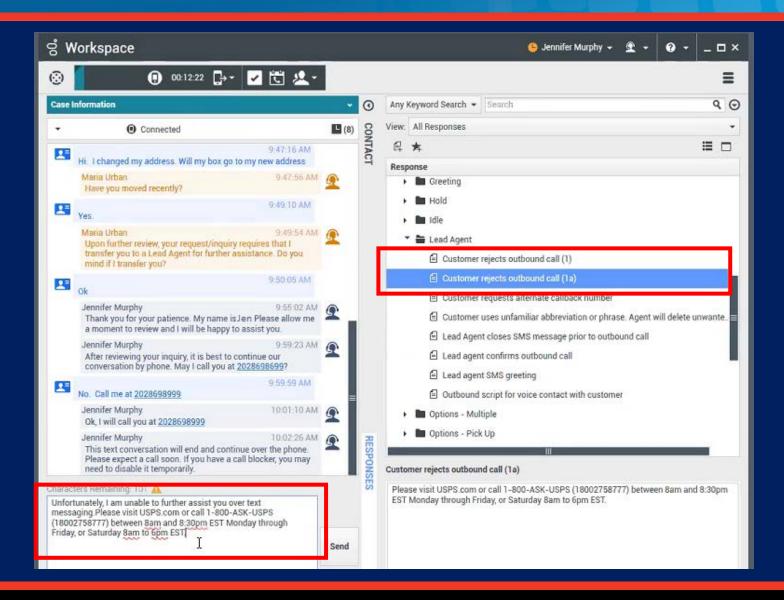
1. Click the Team Communicator (pie) button.

2. Type or copy and paste the phone number to the field in the toolbar.

3. Click the Start Call button.

Good (morning, afternoon, evening). My name is [Agent Name], a lead agent with the United States Postal Service.
I am following up on our recent text interaction.
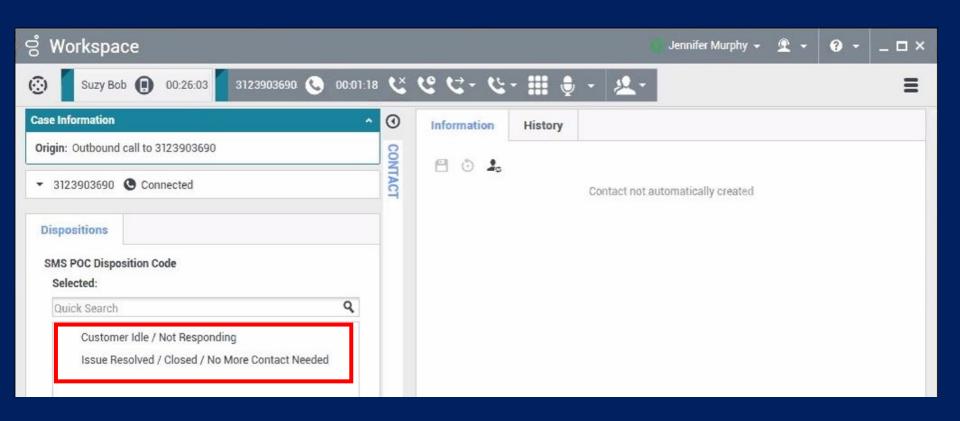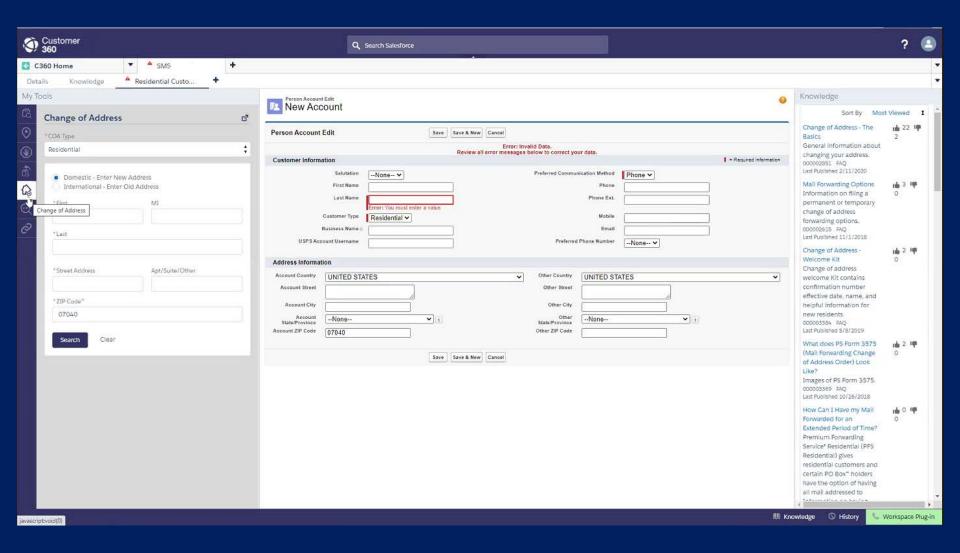
Do not disposition the SMS interaction until after you complete the outbound call to the customer.
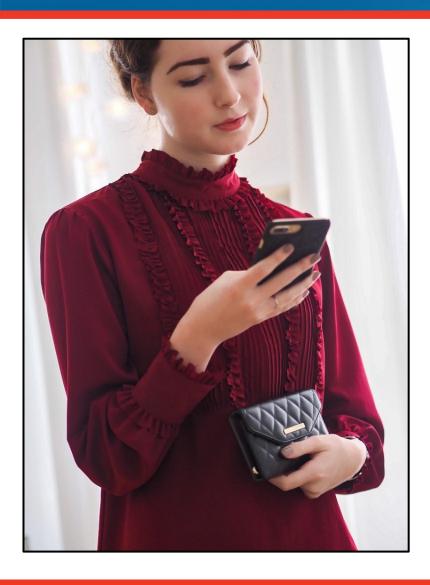
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- Handling SMS Interaction Assist Calls

- Handling SMS Interaction Escalations

- Placing Outbound Calls

- Escalating to Supervisors

- Practice

- Supervisors do not have access to SMS

- Use standard responses to request permission to have Supervisor call back

- If on a voice call, follow current call escalation procedures

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Activity

What is your first action after accepting an SMS escalation?

Place an outbound call to the customer.

Review the chat history.

Send the Lead Agent greeting standard response.

Disconnect the initial Agent.

UNITED STATES POSTAL SERVICE

Activity

Which of the following is a reason to initiate an outbound call?

SMS interaction has lasted more than 10 minutes.

The customer is idle.

A Service Request is needed.
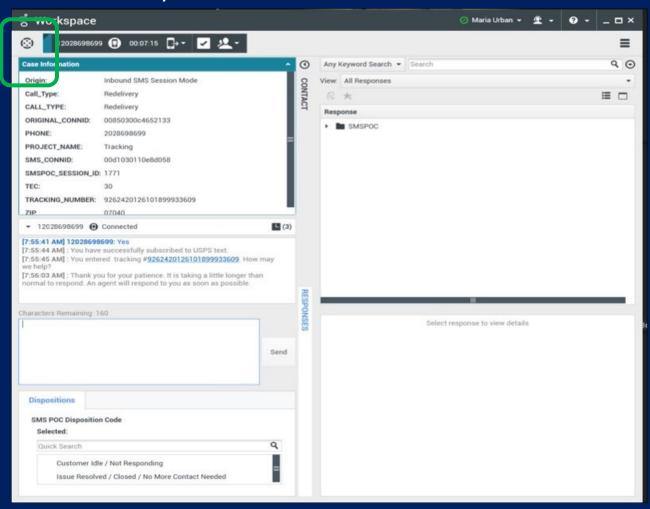
Customer requests to continue via phone.

Where do you click to initiate an outbound call?

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Questions?

- Handling SMS Interaction Assist Calls
- Handling SMS Interaction Escalations
- Placing Outbound Calls
- Escalating to Supervisors
- Practice

Try It

08/2020

UNITED STATES
POSTAL SERVICE
Customer Care Center

SMS Training for Agents

Proof of Concept

Learning Objectives

After completing this training, you will be able to:

- Sign into SMS WDE

- Select SMS WDE Standard messaging

- Understand how SMS and C360 are linked

- Use SMS WDE tools and C360 to assist up to three customers at a time according to the SMS QSDD Guidelines

- Select Disposition Codes in SMS interactions

- Access Lead Assist and Escalate to Leads

SMS Training

For Agents

SMS (Short Message Service)

Text messaging with a mobile phone.

- Accepted by the Customer Care Center

- Testing as a **Proof of Concept**

During this test period, customers who:

- Call 800-275-8777
- Using an iPhone or Android
- Enter their tracking number; AND
- Meet the other criteria

Will be offered to continue their inquiry using the SMS Channel!

Time is important to our customers!

- Reducing wait times in the IVR
- Providing customer friendly support
- Convenient for our customers

Congratulations
You have been selected!

- Proof of Concept is for six weeks
- Test what works best
- If successful, we'll roll out SMS for more agents and customers
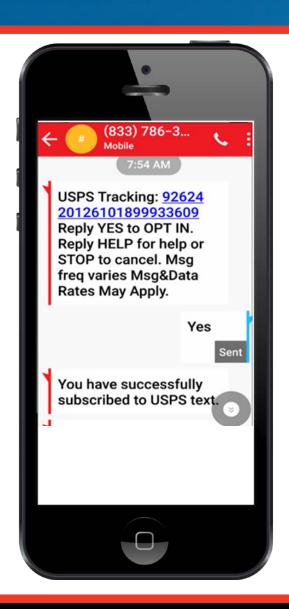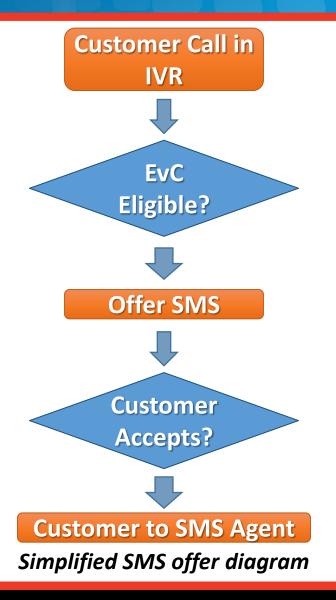
UNITED STATES POSTAL SERVICE

- How Customers Are Invited to Try SMS

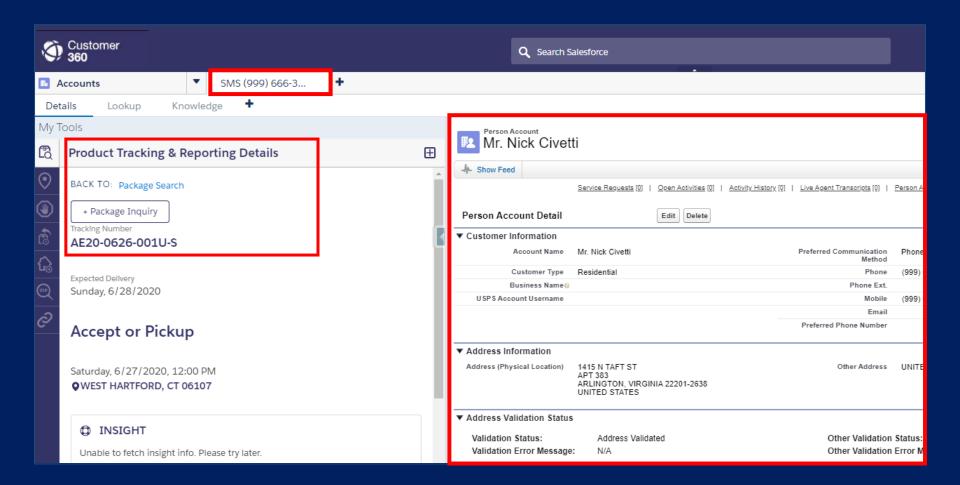- SMS WDE Sign in and Tool introduction

- C360 Interface

- Selecting Standard Responses

- Disposition Codes

- Reactivated SMS Sessions

- Lead Assist and Lead Escalations

- Multiple Sessions

- Tab Management

- SMS QSDD

- Demo/Practice

Customer Call in IVR

EvC Eligible?

Offer SMS

Customer Accepts?

Customer to SMS Agent

Simplified SMS offer diagram
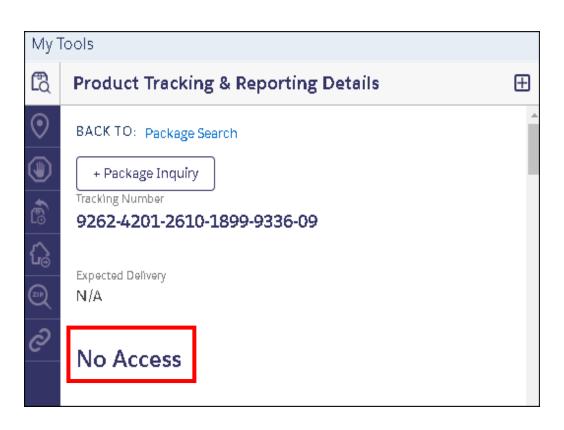
Tracking Calls with one of the four event codes will be offered an SMS invitation.
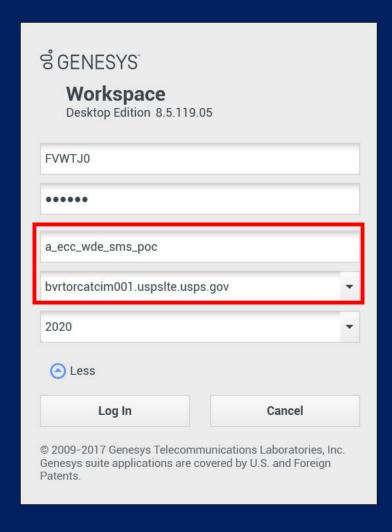
- **EvC_VR_Redelivery Scheduled**

- **EvC_30_No Access**

- **EvC_55_No secure location**

- **EvC_56_No authorized recipient available**

- How Customers Are Invited to Try SMS

- SMS WDE Sign in and Tool introduction

- C360 Interface

- Selecting Standard Responses

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You will be using a different application name for the SMS Project.
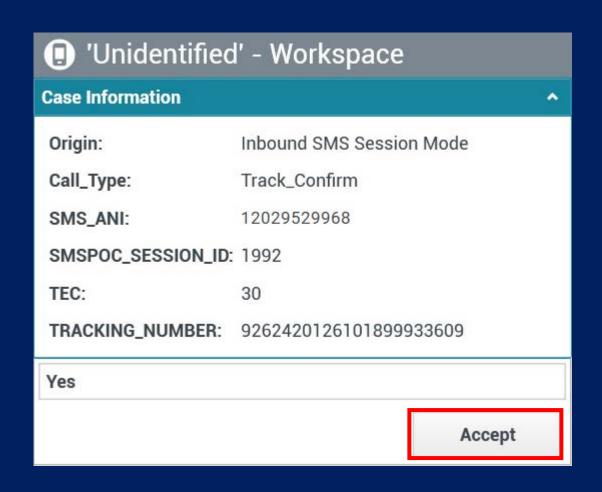
The rest of the log in is the same as usual.
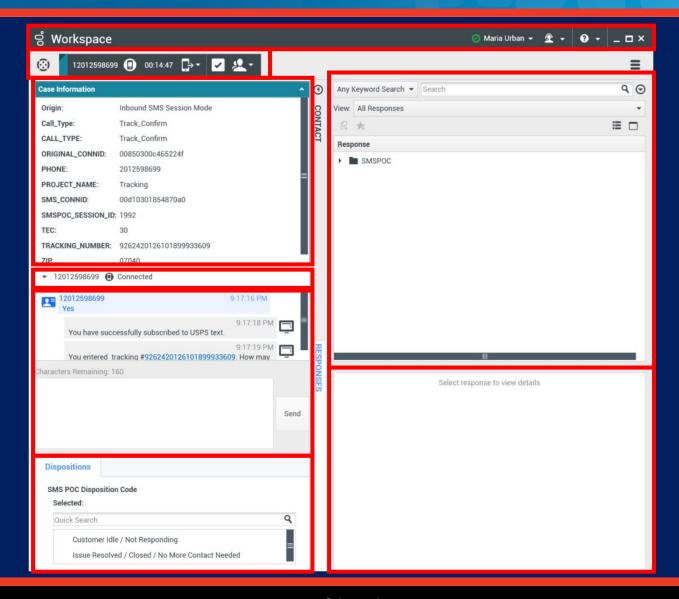
WDE will make a "ring" sound to notify you of an incoming SMS interaction.

Click "Accept" on the lower right side of the screen to accept the interaction.

'Unidentified' - Workspace

Case Information

Origin:	Inbound SMS Session Mode
Call_Type:	Track_Confirm
SMS_ANI:	12029529968
SMSPOC_SESSION_ID:	1992
TEC:	30
TRACKING_NUMBER:	9262420126101899933609

Yes

Accept

UNITED STATES POSTAL SERVICE

Video



ECC
Knowledge Nudge
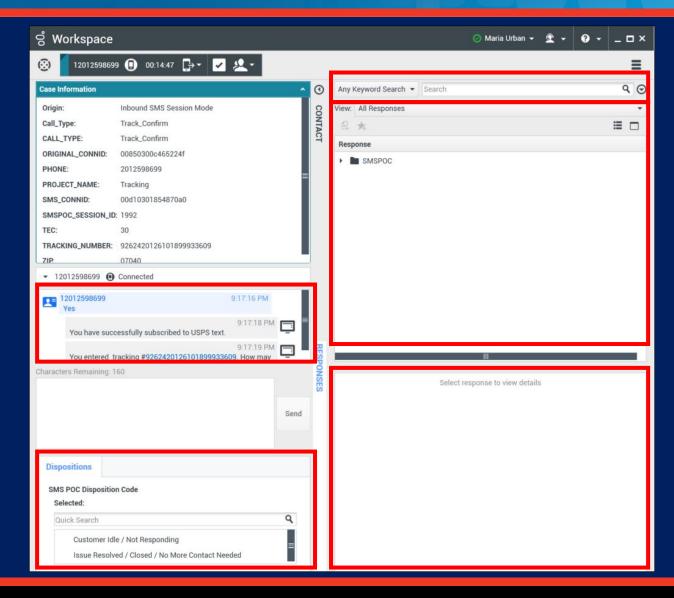
Handling An SMS Interaction

- How Customers Are Invited to Try SMS

- SMS WDE Sign in and Tool introduction

- C360 Interface

- Selecting Standard Responses

- Disposition Codes

- Reactivated SMS Sessions

- Lead Assist and Lead Escalations

- Multiple Sessions

- Tab Management

- SMS QSDD

- Demo/Practice
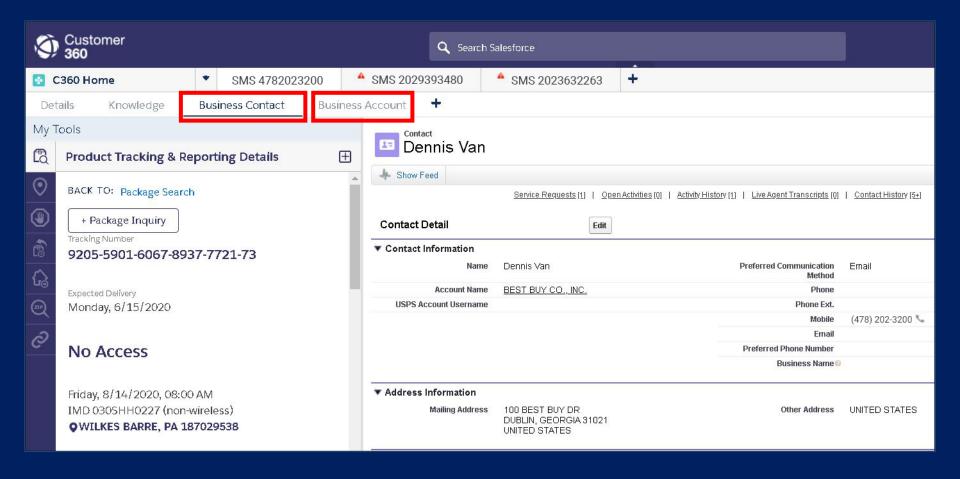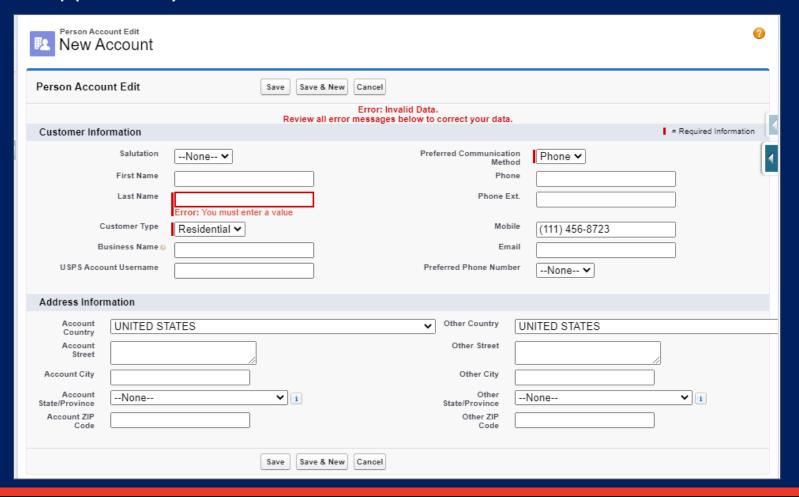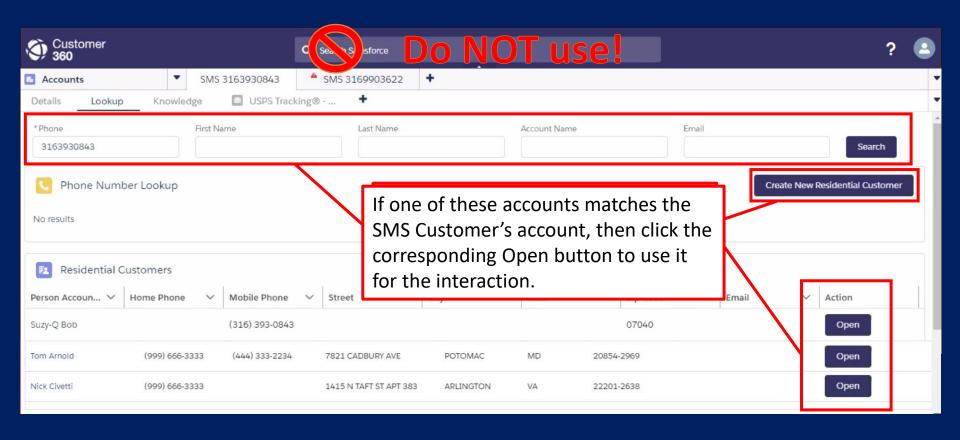
- If the customer doesn't have an account, then the new account page will appear so you can create one.
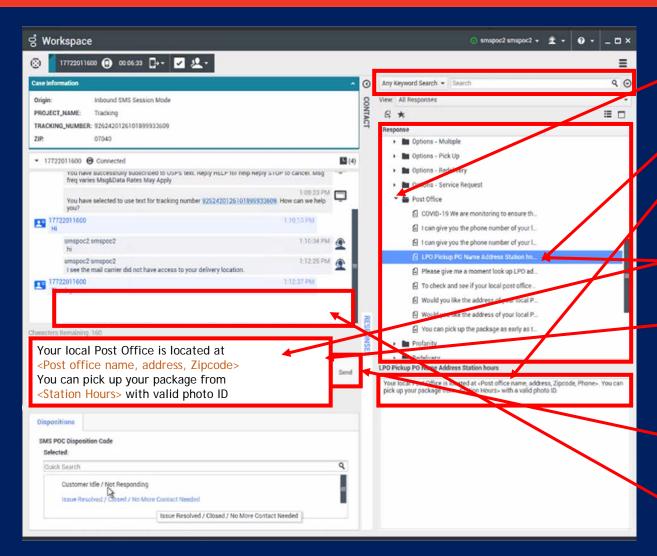
- How Customers Are Invited to Try SMS

- SMS WDE Sign in and Tool introduction

- C360 Interface

- Selecting Standard Responses

- Disposition Codes

- Reactivated SMS Sessions

- Lead Assist and Lead Escalations

- Multiple Sessions

- Tab Management

- SMS QSDD

- Demo/Practice

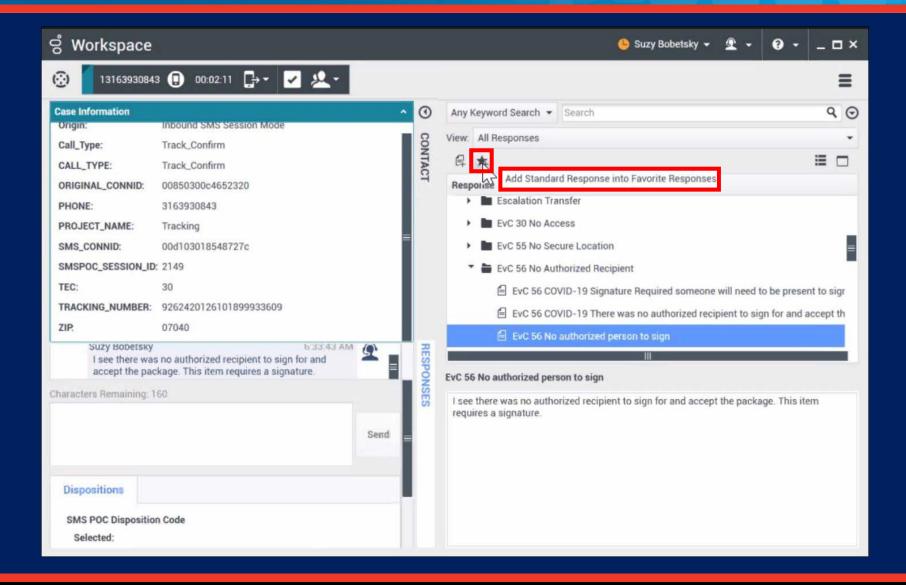# Selecting and Editing Standard Responses

1. Click the drop down arrow to the left of folder.

2. Click to highlight response.

3. Preview response in the box below.

4. Double-click highlighted response to copy into editing box.

5. Edit according to QSDD Standards if necessary (location, hours, misspelled words, duplicate entry).

6. After proofreading, click Send to right of text box

When sent, the message will appear in the Active SMS Interaction panel above the editing box.

SMS requires a more formal style than personal texting:

Do:
- Converse as you would with customers by phone.
- Be professional.
- Be courteous: select "please" and "thank you" messages.

Don't:
- Don't use abbreviations and acronyms.
- Don't use emojis.
- Avoid negative words and statements.
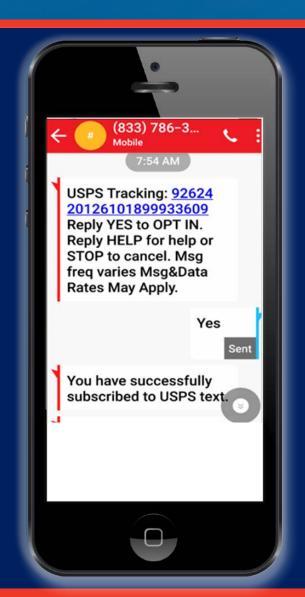- Don't use apostrophes.

OMG!

No, I can't do that.

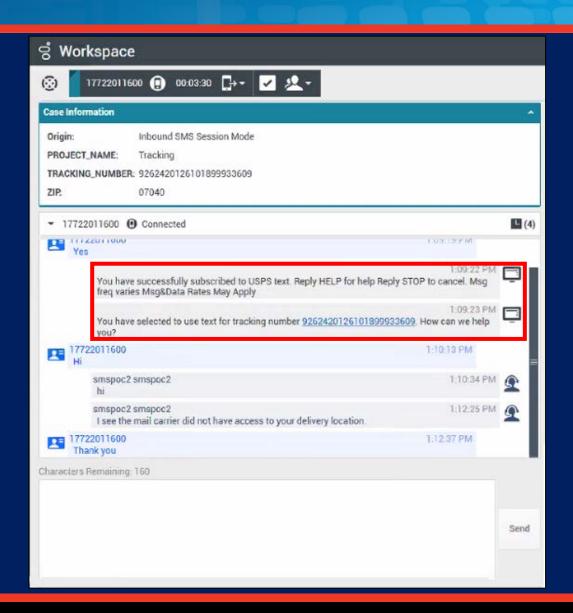Need help understanding a customer's abbreviation?

See knowledge article:

Quality: SMS Handling

- How Customers Are Invited to Try SMS

- SMS WDE Sign in and Tool introduction

- C360 Interface

- Selecting Standard Responses

- Disposition Codes

- Reactivated SMS Sessions

- Lead Assist and Lead Escalations

- Multiple Sessions

- Tab Management

- SMS QSDD

- Demo/Practice
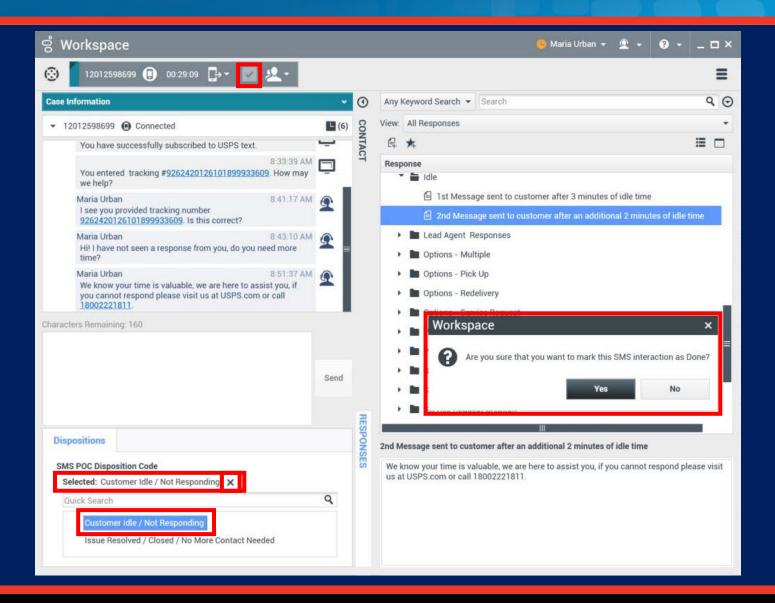
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POSTAL SERVICE

Customer Idle / Not Responding

This disposition code allows you to close the interaction if the customer has not responded in a while. They can reestablish the session within a specified period of time.

Issue Resolved / Closed / No More Contact Needed

This disposition code indicates the issue has been resolved, the session is finished, and no more contact is needed.

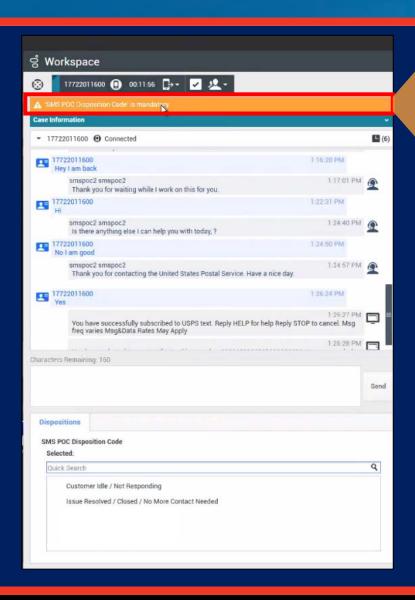Customer calls in and receives initial SMS, but does not opt-in right away
1. Automated Opt-in message sent
    - No response from customer
    - Agent will send 3 minute message
2. An additional 2 minutes has passed
    - Agent will send 2 minute message
    - Select Disposition
    - Click Done

Message Source	Timing	Message Language
Agent - Manual	Message sent to customer after 3 minutes of idle time	Hi! I have not seen a response from you, do you need more time?
Agent - Manual	Message sent to customer after an additional 2 minutes of idle time	We know your time is valuable, we are here to assist you, if you cannot respond please visit us at USPS.com or call 18002221811.
System – Automatic response to reactivation	Message sent as auto response if customer attempts to text back into the session, after max allowed time: **10 MINUTES.**	It looks like we missed you, your session has closed. Please visit us at USPS.com or call 18002221811. We value you as a customer and are here to assist you. Thank you for contacting USPS.

'SMS POC Disposition Code' is mandatory

You must select a disposition code before you can exit the session.

Which of the following Disposition Codes have a 10-minute timer?

a. Issue Resolved / Closed / No More Contact Needed

b. Customer Idle / Not Responding

True or False? You can go back and change the disposition after you have clicked the "Done" button.

a. True

b. False

False. You cannot change the disposition code once you have closed the session.

- How Customers Are Invited to Try SMS

- SMS WDE Sign in and Tool introduction

- C360 Interface

- Selecting Standard Responses

- Disposition Codes

- Reactivated SMS Sessions

- Lead Assist and Lead Escalations

- Multiple Sessions
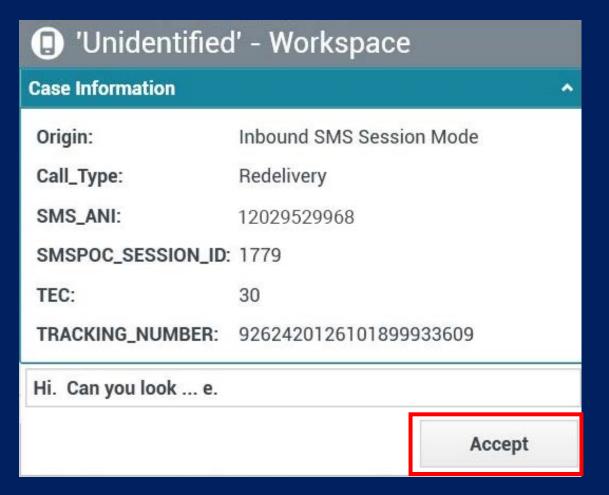
- Tab Management

- SMS QSDD

- Demo/Practice

Idle Time Process

- After 3 minutes of customer idle, Agent sends message: "Hi. I have not seen a response…?"
- After 2 minutes, Agent sends "We know your time is valuable." message and Dispositions.

1. If customer responds *within* 10 minutes, system will attempt to route SMS back to original Agent.
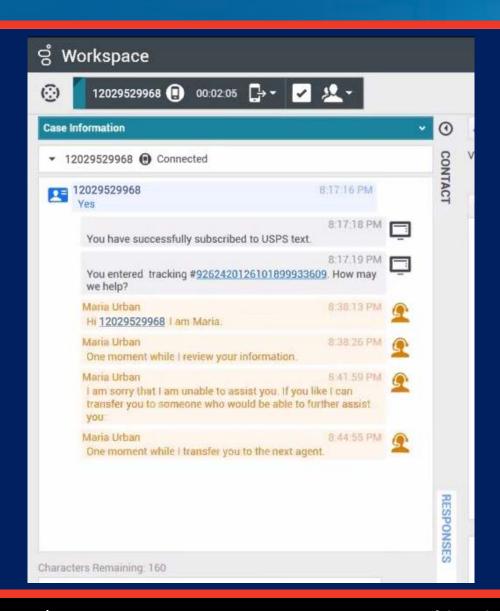2. If original Agent is not available, it will route to the next available Agent.

'Unidentified' - Workspace

Case Information

Origin:	Inbound SMS Session Mode
Call_Type:	Redelivery
SMS_ANI:	12029529968
SMSPOC_SESSION_ID:	1779
TEC:	30
TRACKING_NUMBER:	9262420126101899933609

Hi. Can you look ... e.

Accept

- If the customer sends a text message within the reactivation period, the session will be reactivated.

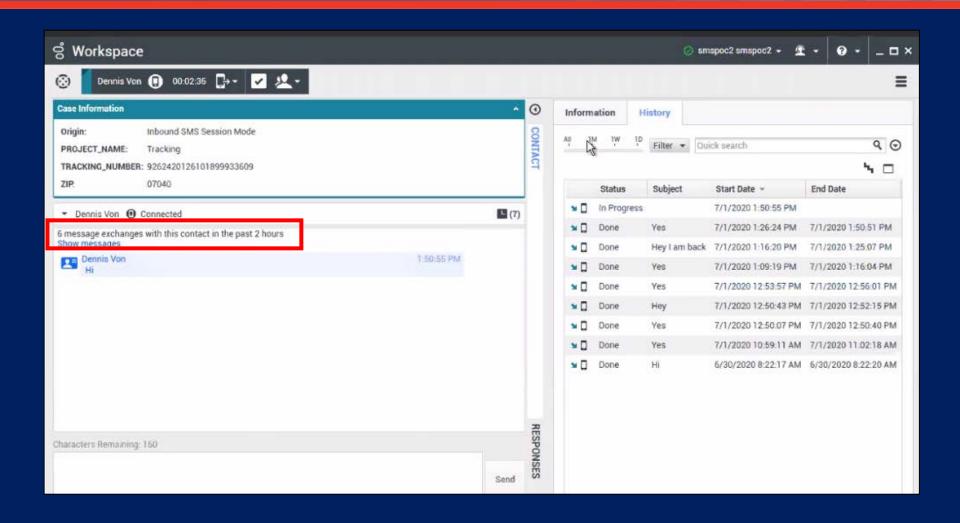- WDE pop-up window will appear on Agent's desktop.

- Agent must click Accept to continue session.

- If the original Agent isn't available, WDE will route the interaction to the next available Agent.

- The new agent's text to the customer will appear golden-yellow in the Active SMS Responses pane.
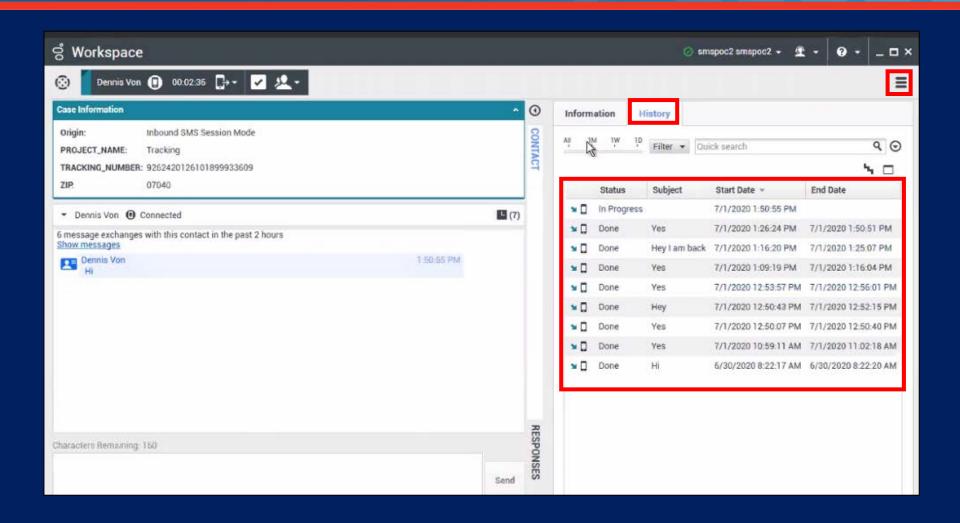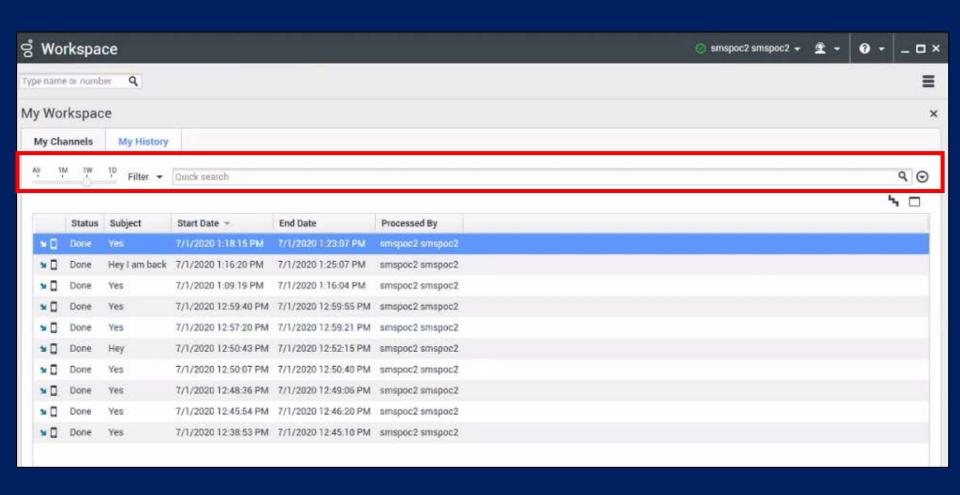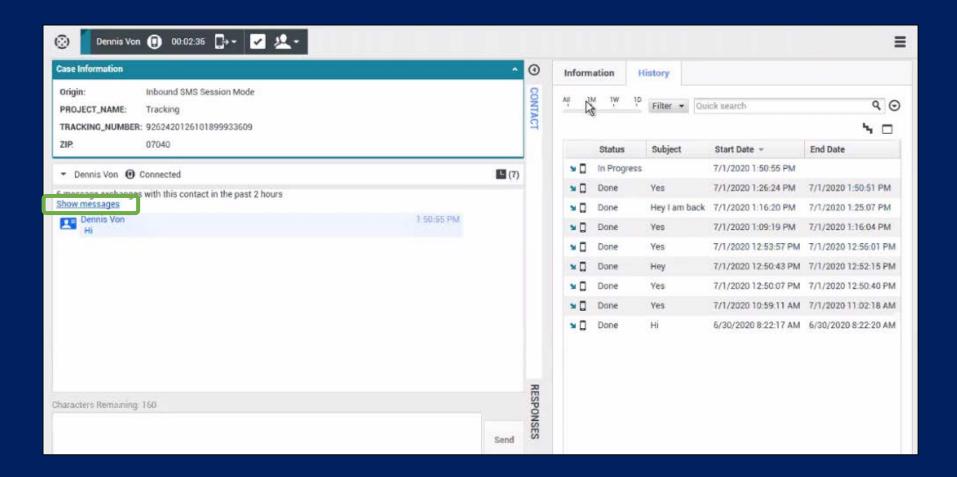
Where would you click to see the customer interactions for the last 2 hours?
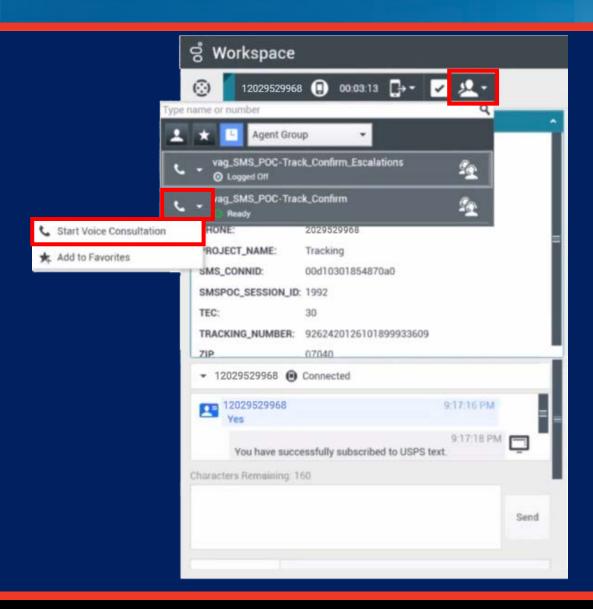
- How Customers Are Invited to Try SMS

- SMS WDE Sign in and Tool introduction

- C360 Interface

- Selecting Standard Responses

- Disposition Codes

- Reactivated SMS Sessions

- Lead Assist and Lead Escalations

- Multiple Sessions

- Tab Management
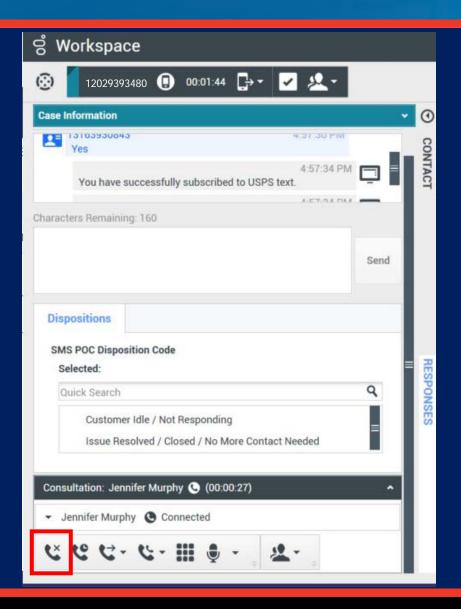
- SMS QSDD
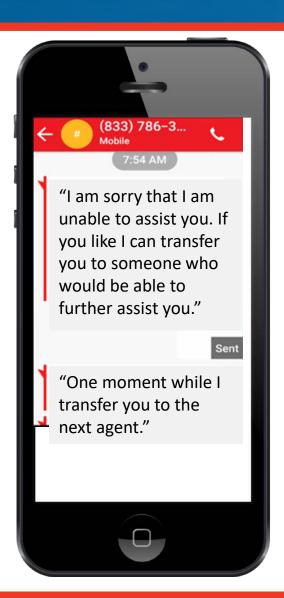
- Demo/Practice

Use the WDE Voice line to contact Lead Agents for assistance.

When you're finished with the consultation, use the End Call button on the bottom left of the window.

There will be times when you need to Transfer the customer to the Lead Escalation Queue.
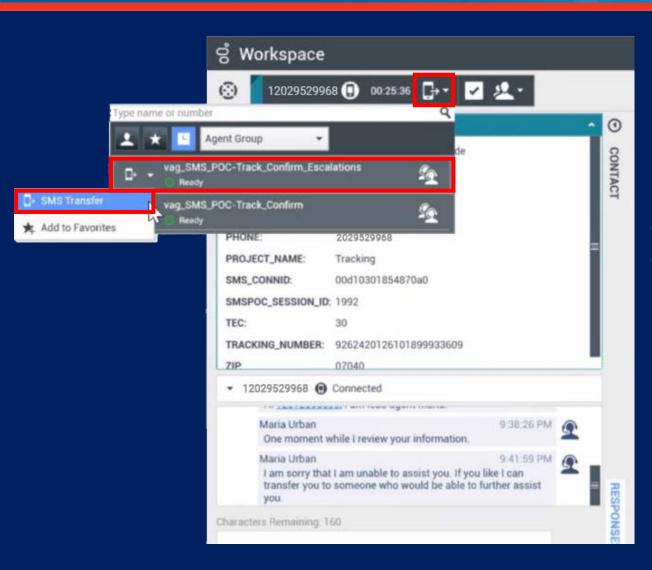
Select the following Standard Messages prior to transfer:

"I am sorry that I am unable to assist you. If you like I can transfer you to someone who would be able to further assist you."

"One moment while I transfer you to the next agent."

Use the SMS Transfer icon to escalate the interaction.

This is an SMS Warm Transfer.

What should you do if a customer asks for the Post Office hours for their location?

Answer the question by typing free text response, making sure that there are no spelling errors.
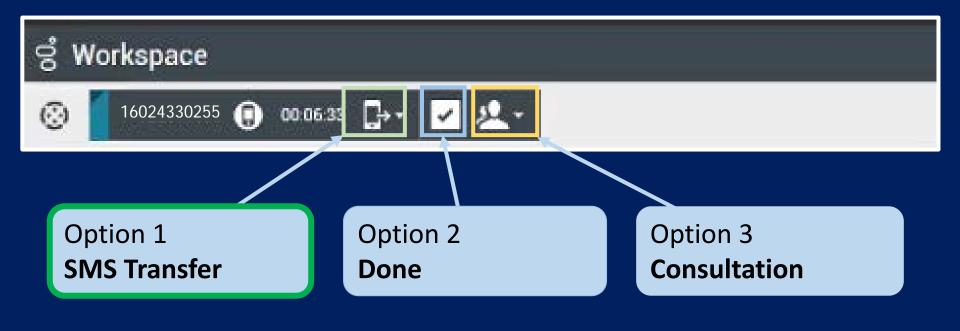
Select the appropriate Standard Response and edit it with the Post Office information.

Transfer the customer to another Agent.

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Which of the following icons would you use to escalate the customer?

Workspace

16024330255   00:06:33

Option 1
SMS Transfer

Option 2
Done

Option 3
Consultation

- How Customers Are Invited to Try SMS

- SMS WDE Sign in and Tool introduction

- C360 Interface

- Selecting Standard Responses

- Disposition Codes

- Reactivated SMS Sessions

- Lead Assist and Lead Escalations

- Multiple Sessions

- Tab Management

- SMS QSDD

- Demo/Practice

UNITED STATES POSTAL SERVICE

When it's time for break, but you're still working on interactions, select the "Pre-Break" status.

The system will automatically put you into "Break" status when you're finished with any open interactions.

Genesys · Workspace

Type name or number

Dean Carnes

Not Ready - Meeting
Not Ready - Meeting(SFS)
Not Ready - Nesting
Not Ready - Nordstrom Research
Not Ready - One on One
Not Ready - Payment IVR
Not Ready - Personal Break(SFS)
Not Ready - Phone Room(SFS)
Not Ready - PM Break(SFS)
Not Ready - Postal Store(SFS)
Not Ready - Pre-Break
Not Ready - PRU Work(SFS)
Not Ready - PSE Correspondence(SFS)
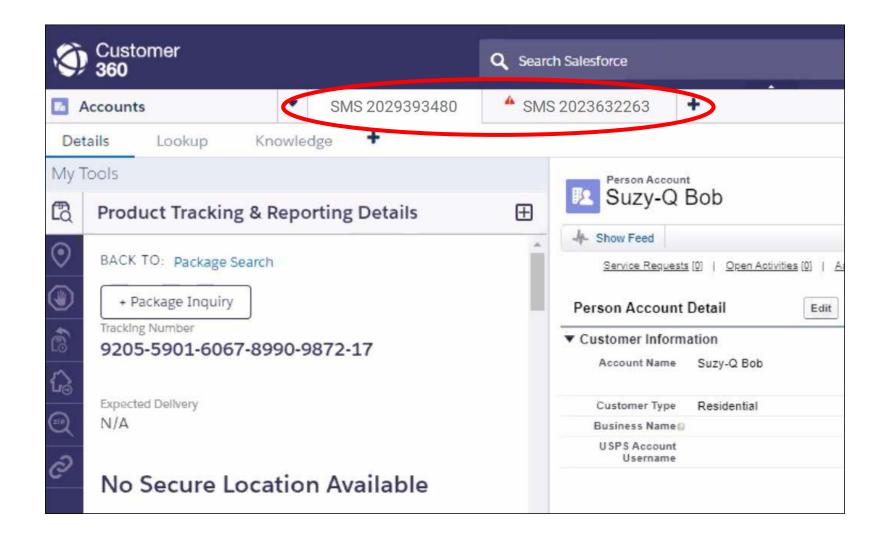Not Ready - PSE Returned Stock(SFS)
Not Ready - QA Review

- How Customers Are Invited to Try SMS

- SMS WDE Sign in and Tool introduction

- C360 Interface

- Selecting Standard Responses

- Disposition Codes

- Reactivated SMS Sessions

- Lead Assist and Lead Escalations

- Multiple Sessions

- Tab Management
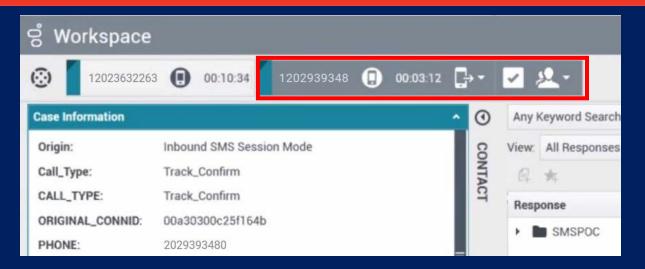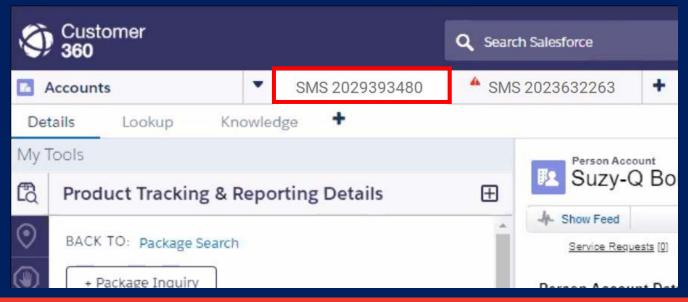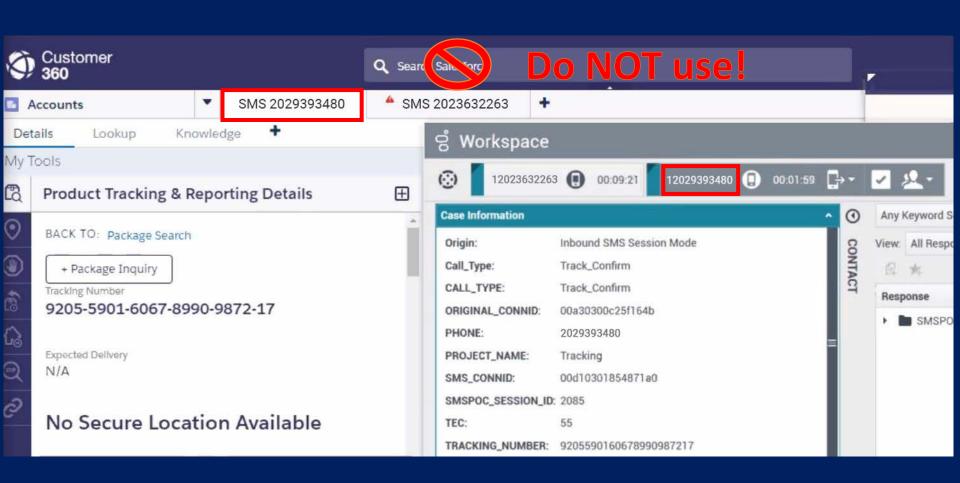
- SMS QSDD

- Demo/Practice

What does it mean when the interaction tab in SMS is flashing?

Your message has a spelling error.

The customer was sent a system-generated message.

You forgot to click the Done button.

The customer has sent a text message.

- How Customers Are Invited to Try SMS

- SMS WDE Sign in and Tool introduction

- C360 Interface

- Selecting Standard Responses

- Disposition Codes

- Reactivated SMS Sessions

- Lead Assist and Lead Escalations
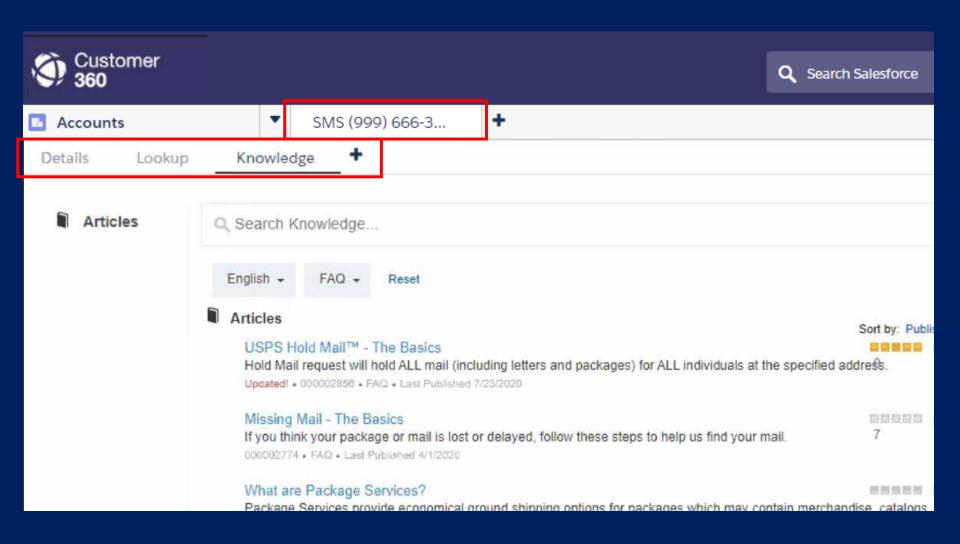
- Multiple Sessions

- Tab Management

- SMS QSDD

- Demo/Practice

Criteria Item #	Chat/SMS
1	**Authentication**
1.1	Did agent avoid releasing PII to an unauthorized party?
2	**Compliance**
2.1	Did agent comply with all regulatory practices and avoid undesirable behaviors?
3	**Opening the Interaction**
3.1	Did agent open the interaction in accordance words demonstrating a willingness to assist

Did agent open the interaction in accordance with organizational standards?

Criteria Item #	Voice		Chat/SMS
4	Connecting with the Customer		Connecting with the Customer
4.1	Did agent adapt vocal tone, pace and inflection based on the customer's emotional state?		Did agent use appropriate grammar, spelling and punctuation when responding? (Avoids use of all capital letters or punctuation to convey emotion.)
4.2	Did agent display responsive listening skills?		Did agent specifically address all of the customer's questions or requests?
4.3	Did agent respond appropriately to customer's emotional state and verbal cues?		Did agent demonstrate self-control, patience and courtesy, apologizing when necessary?
4.4	Did agent follow proper hold procedures?		N/A

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Criteria Item #	Voice	Chat/SMS
4	Connecting with the Customer	Connecting with the Customer
4.5	Did agent guide the call?	Did the agent set the expectation that there will be a pause in communication while researching the customer's request? Did the agent respond to the customer message in a timely manner demonstrating gratitude for the customer's cooperation and patience if there was a delayed response from the agent?
4.6	Did agent develop and maintain a rapport with the customer?	Did agent use positive phrases, and terminology to personalize the customer experience?
4.7	Did agent represent the USPS in a helpful manner?	Did agent represent the USPS in a positive manner by drafting a professional written response with appropriate and helpful content?
4.8	Did agent display confidence on the call?	Did agent display understanding of the customer's concerns (paraphrase issue back to customer) and knowledge when responding?

UNITED STATES POSTAL SERVICE

Criteria Item #	Voice	Chat/SMS
5	**Problem Solving**	**Problem Solving**
5.1	Did agent anticipate and educate the customer about USPS products and services for future needs?	Did agent represent the USPS in a helpful manner? (offers additional product and services as it applies)
5.2	Did agent deliver negative information effectively?	Did agent deliver negative information effectively, phrasing responses appropriately?
5.3	Did agent display discovery and triage skills?	Did agent ask tactful, clarifying questions to gain knowledge and understanding, when necessary?
5.4	Did agent provide accurate information to the customer?	Did agent provide accurate information to the customer?
5.5	Did agent provide complete information to the customer?	Did agent provide complete information to the customer?
5.6	Did agent use the appropriate resources?	Is there evidence in the agent's response that appropriate resources including standard responses and templates where used?
5.7	Did agent correctly verify the customer's information?	Did agent correctly verify the customer's information?
5.8	Did agent review and notate accordingly?	Did agent review and notate accordingly?

Criteria Item #	Voice	Chat/SMS
6	**Closing the Interaction**	**Closing the Interaction**
6.1	Did agent offer additional assistance?	Did agent offer additional assistance? Did agent indicate the customer can call the USPS CCC or E-mail for further assistance if necessary?
6.2	Did agent close the interaction in accordance with USPS standards?	Did agent close the interaction in accordance with USPS standards?
7	**Transfers**	**Transfers**
7.1	Did agent follow the approved transfer procedures?	Did agent follow the approved transfer procedures to escalate the interaction?

SMS Interactions will undergo Quality review the same as voice interactions

USPS Confidential

Questions?

- How Customers Are Invited to Try SMS
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Demo

Activity