**UNITED STATES
POSTAL SERVICE**

May 7, 2024

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

Certified Mail Tracking Number:
7020 3160 0002 0328 1607

Dear Ivan:

As a matter of general interest, the Postal Service plans to pilot an enhancement to the Retail System Software (RSS) that will allow Sales and Service Associates (SSAs) to enter and view LEADing Together Customer leads while interacting with customers at the retail counter.

Effective May 18, the enhancement will be piloted in 371 offices in four (4) districts: North Carolina, Minnesota-North Dakota, Florida 2, and California 5. Enclosed on compact disc (CD) is a list of the offices that will be included.

Also enclosed on CD is the LEADing Together New Functionality Guide (NFG) and a stand-up talk that will be provided to SSAs in the pilot locations.
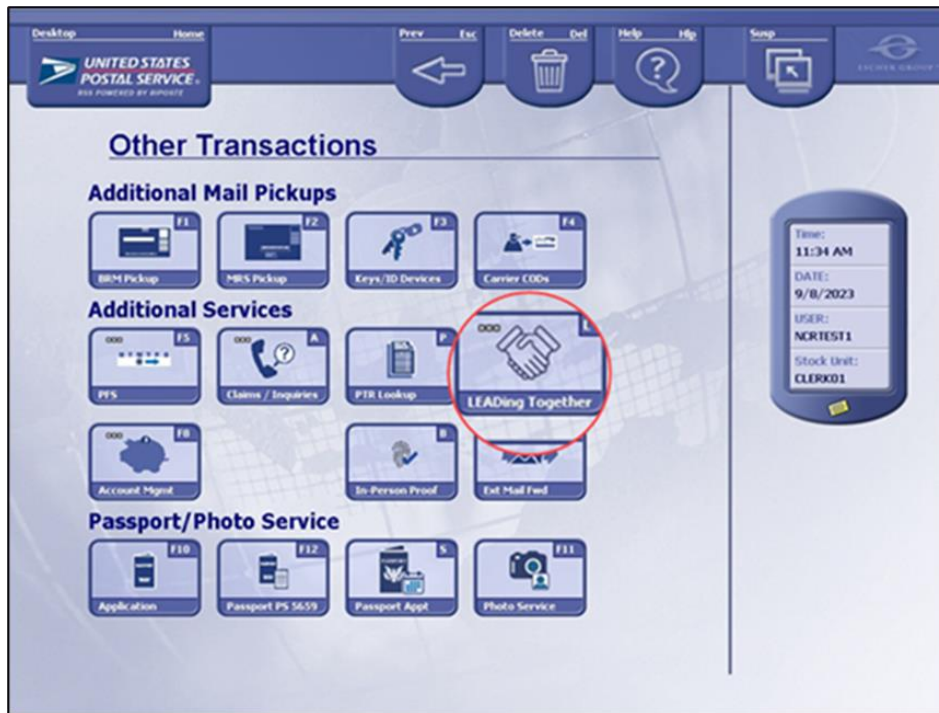
Please contact Dion Mealy at 202-507-0193 if you have any questions concerning this matter.

Sincerely,

Shannon Richardson
Director
Contract Administration (APWU)

Enclosure

(CA2024-100)

LEADing Together Coming to RSS

Starting this May, Sales and Services Associates (SSAs) in select locations will be able to enter and view their LEADING Together Customer leads through the Retail Systems Software (RSS).

The 4 Districts that will be involved in the pilot include; California 5, MN-ND, Florida 2 and North Carolina.

This enhancement will give SSAs the ability to enter leads into the LEADing Together program in real time when talking directly to the customer at the retail counter. Capturing leads in this manner will not only benefit the USPS – but also its customers:

- Customers will feel their businesses are valued as their info is captured and expedited to the USPS sales team in real time.
- Information collected and entered when the customer is present will be more accurate since it can be verified at the time of entry.
- Customers who have questions regarding the status of their lead, can ask an SSA to check the LEADing Together program in RSS to see if any contact attempts were made or if they need to request their lead to be re-opened.

If there is a line at the window - and if entering a lead would potentially cause an unacceptable wait for other customers - SSAs should simply provide a paper lead card to the business customer and enter their info after the line has dissipated.

Providing easy access to the LEADing Together program will improve our ability to support businesses by quickly connecting them to our unmatched sales network.

A copy of the RSS LEADing Together National Field Guide, NFG will be sent soft copy to all offices involved in the pilot and can also be viewed on the USPS Connecting with Customers Website on Blue at:
https://blue.usps.gov/marketing/sales-intelligence-and-support/small-bus-lead-gen-programs.htm

LEADing Together

New Functionality Guide (NFG)

February 22, 2024

IMPORTANT: This guide is intended to be read by all RSS users no more than two weeks prior to the functionality being activated in their units.

Regarding the use of this guide: RSS training materials are produced by USPS Retail Operations and may be sent to the field electronically for convenience, cost effectiveness and timely delivery. The materials are not to be electronically edited and reprinted without permission of Retail Operations.

Note: The sign in sheet at the back of this guide should be recorded and maintained locally.

TABLE OF CONTENTS

This change is for FWS and SDA sites only.

1. Introduction

LEADing Together is a key part of the USPS DFA plan, to help Fill the Trucks with new mail and package volume. It combines the six (6) Employee Lead programs including Clerks Care, Customer Connect, Business Connect, Rural Reach, Mail Handlers & Submit a Lead into one all employee lead generation program for the organization. The program is available for all employees to speak to small businesses about their needs and to submit the customer's contact information to our sales team for the purpose of generating new revenue for USPS and re-enforces our commitment to support local small businesses across the nation

The new *LEADing Together* workflow can be accessed on the *Other Transactions* screen.

Access to the *LEADing Together* workflow will be limited to users with the Retail Clerk role.
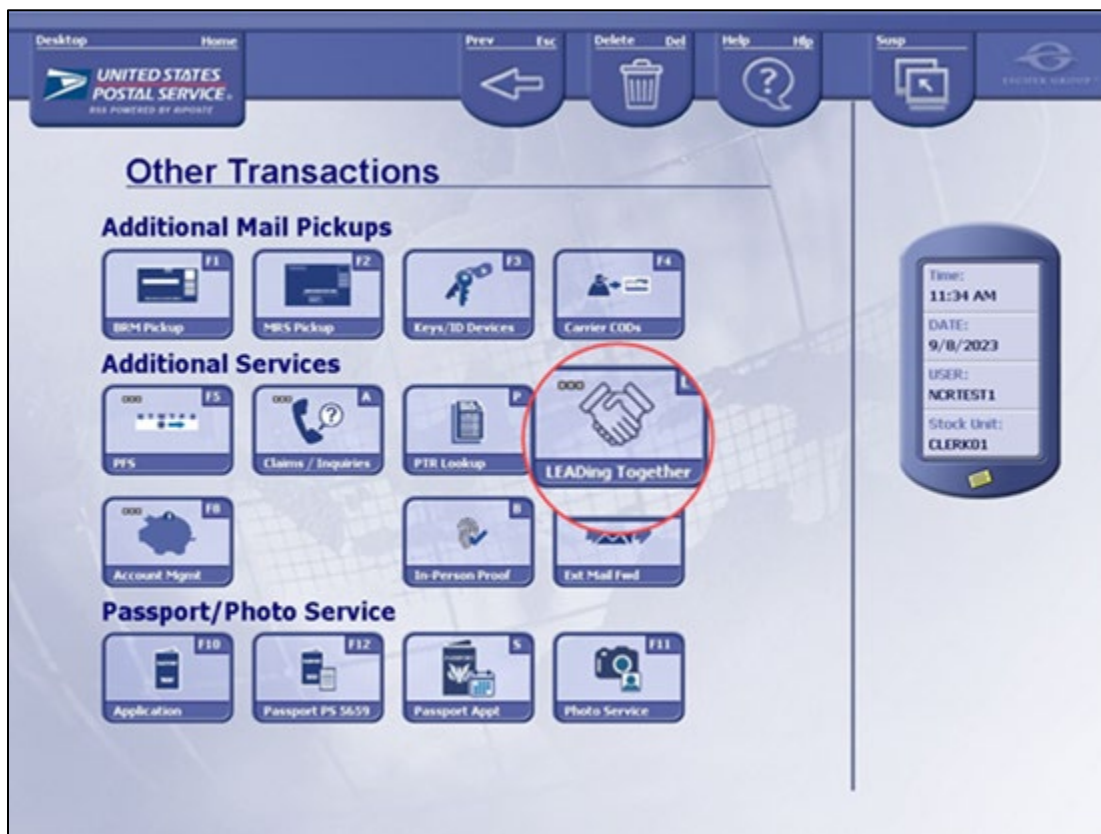
Figure 1

After selection of then **LEADing Together** button, a new *LEADing Together* screen displays with two (2) new buttons:

- **Submit Lead**

- **View Leads**
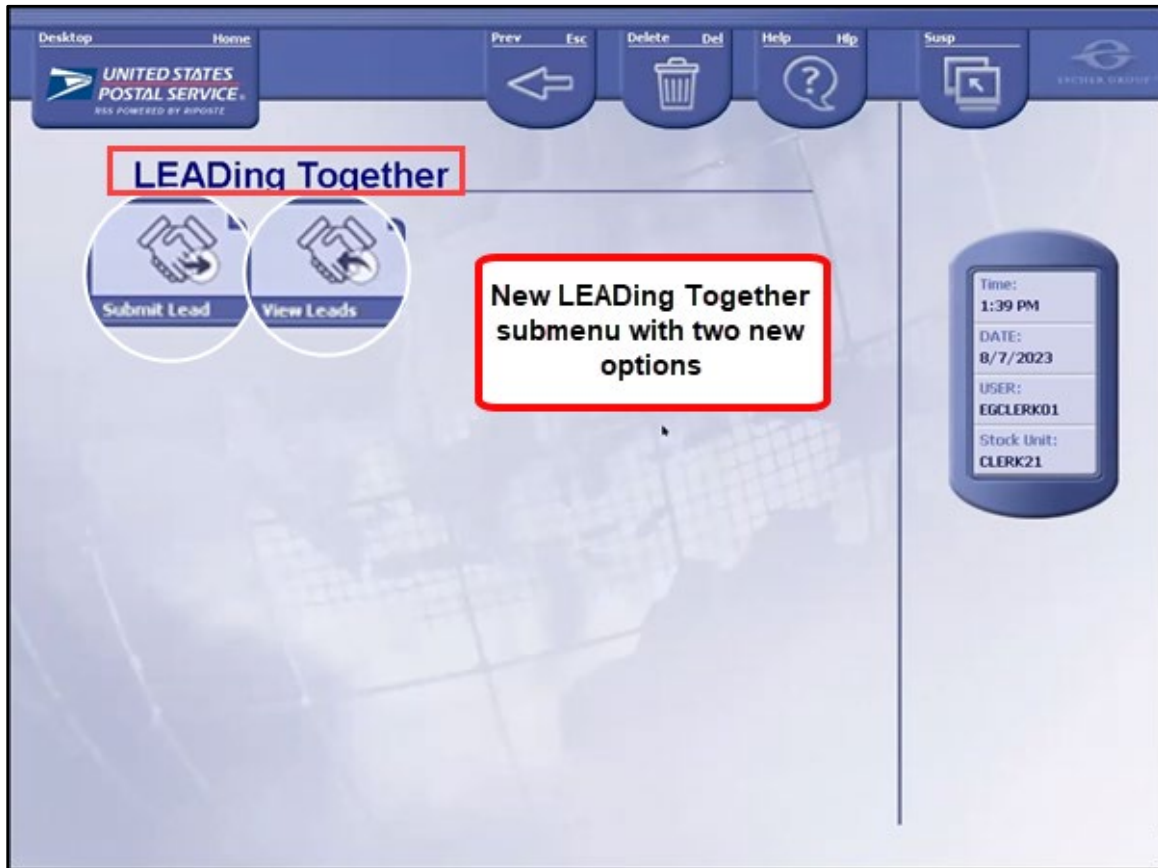
Figure 2

2.   Submit Lead

The *Submit Lead* workflow cannot be combined with other transactions in the same customer visit. If there already is a transaction on the stack when *Submit Lead* is selected, the following *Error* message will be displayed.
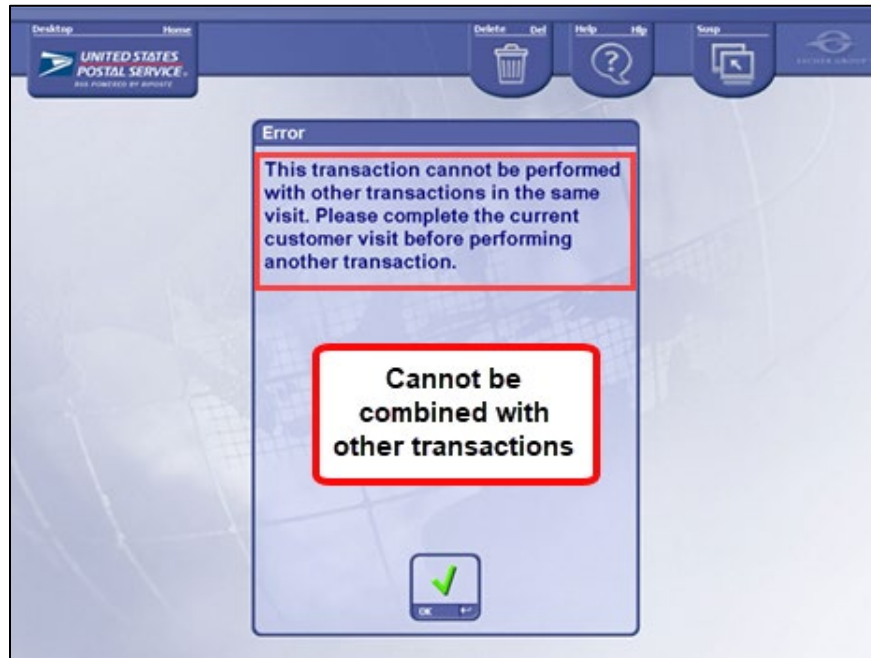

Figure 3

If there are no other transactions on the stack, enter the 8-digit employee ID number (EIN).
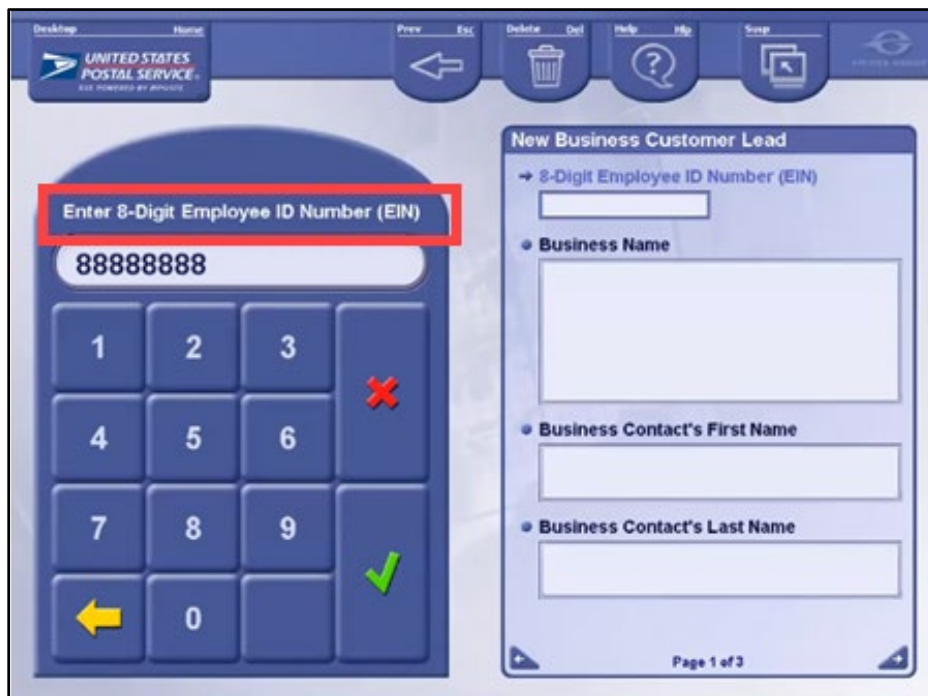
Figure 4

After successful entry of the EIN number, the Privacy Act Statement will be displayed on the CDU with corresponding message on the RA screen.
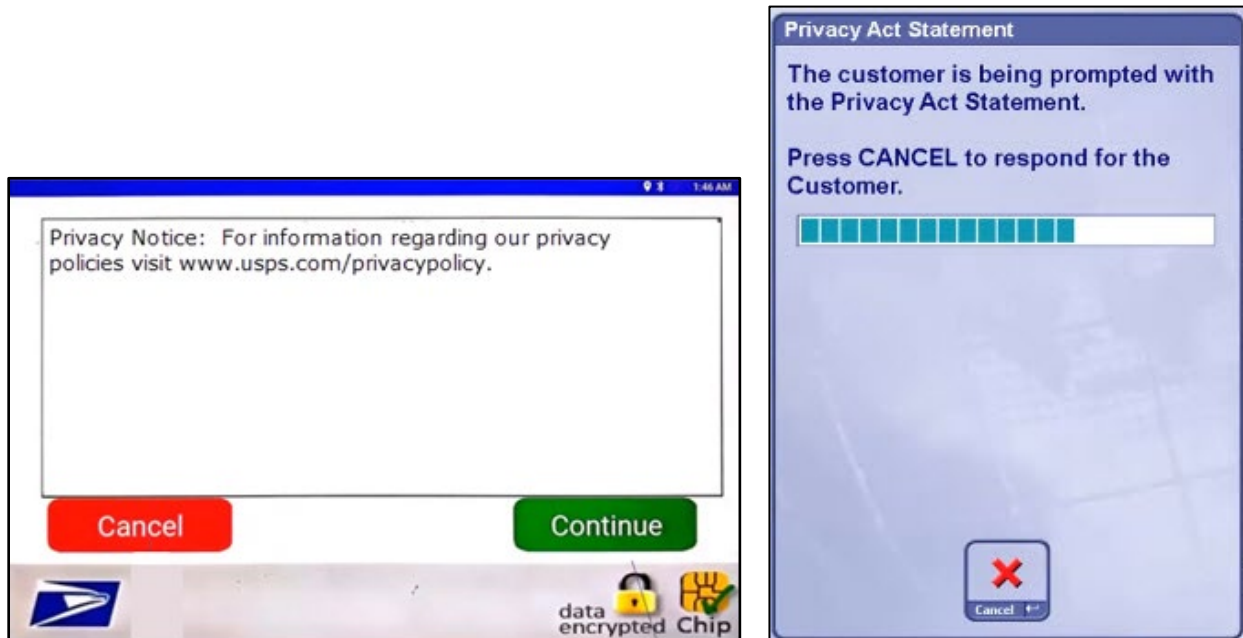
Figure 5

If the customer selects **Cancel**, the following screen will be displayed.
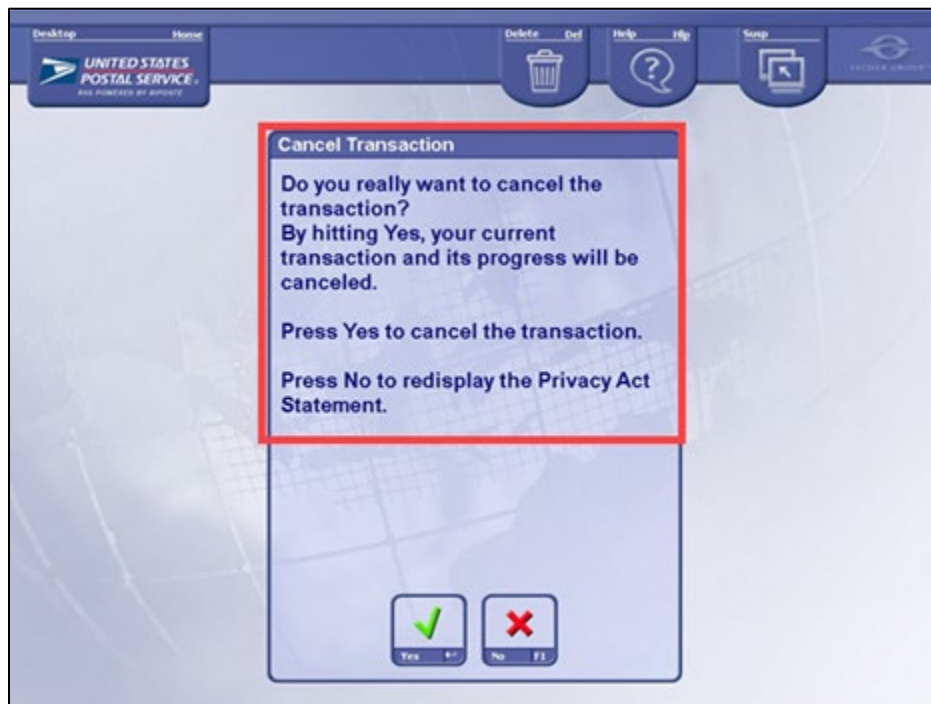
Figure 6

If the customer does want to cancel the transaction, select **Yes**.

Select **No** to redisplay the Privacy Act Statement to the customer on the CDU.

If the customer selects **Continue** on the *Privacy Act* screen (Figure 5), enter the business name.
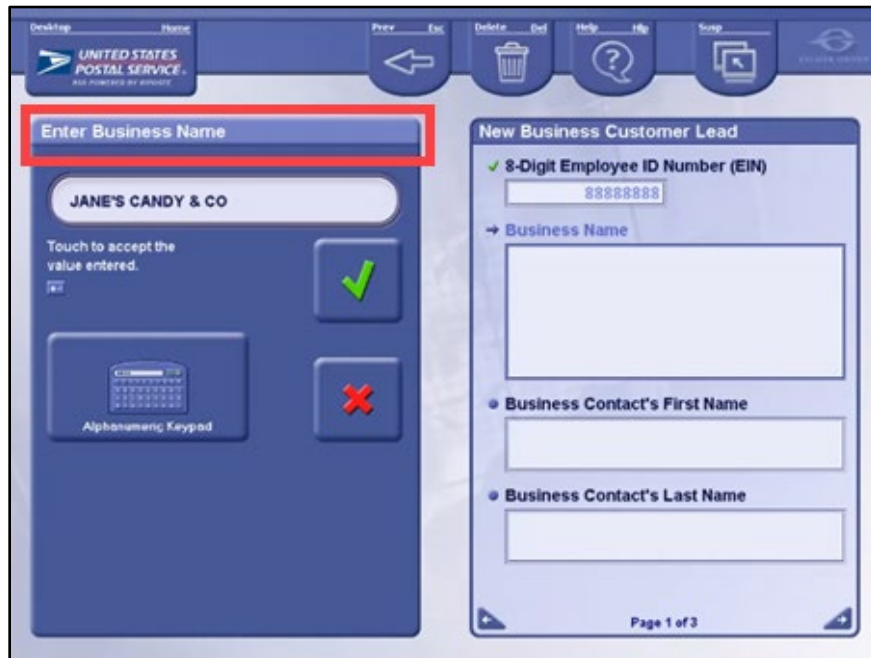
Figure 7

Enter business contact's first name.
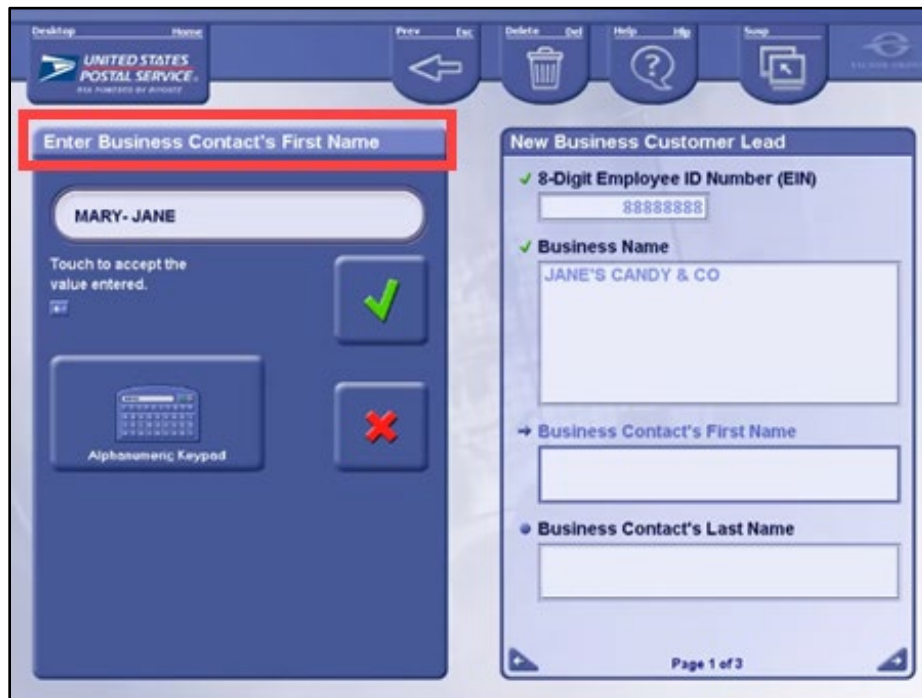
Figure 8

Enter business contact's last name.
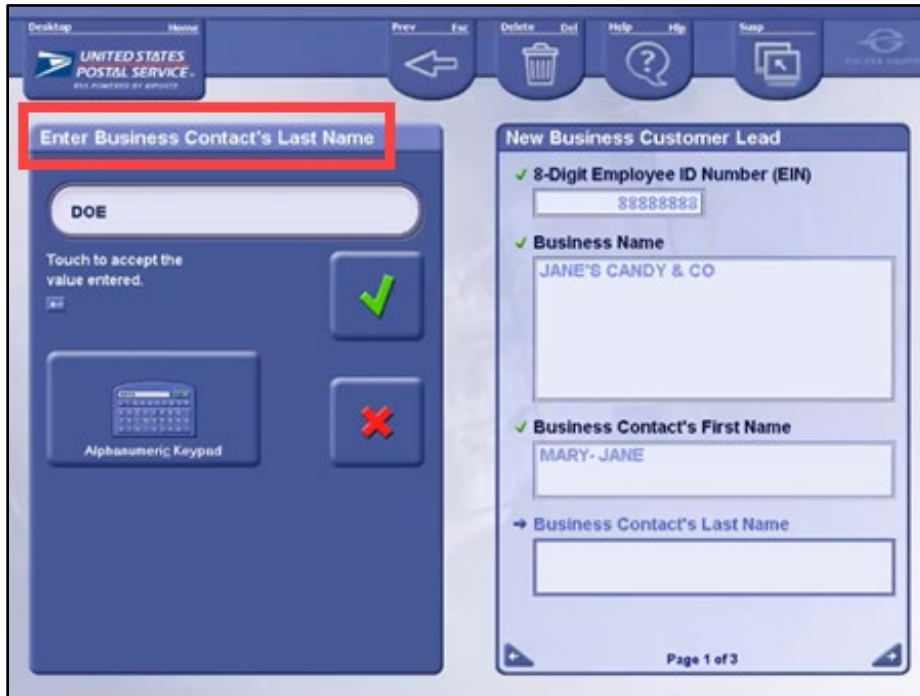
Figure 9

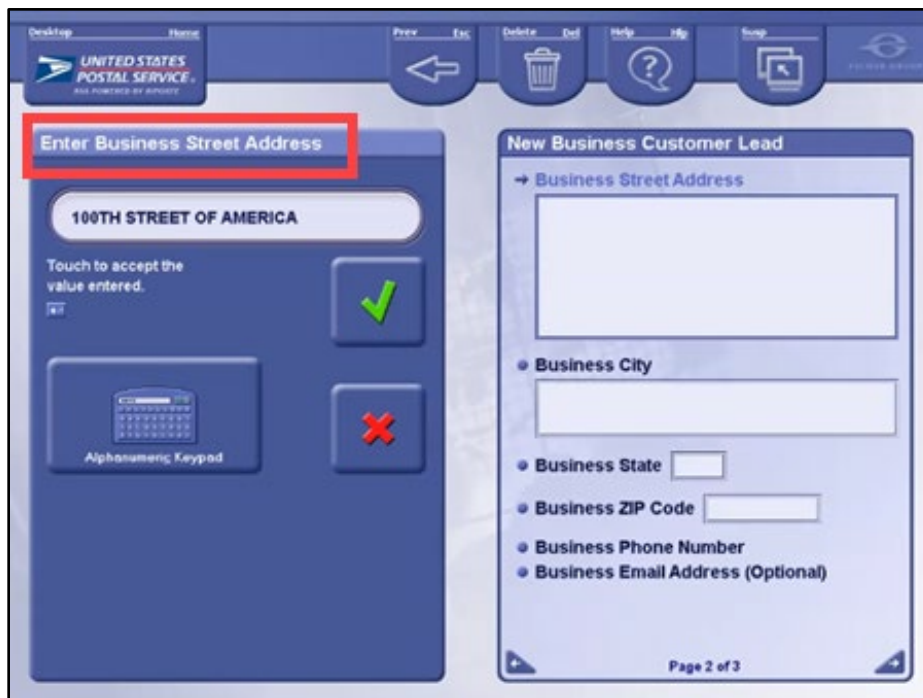Enter the street address for the business.
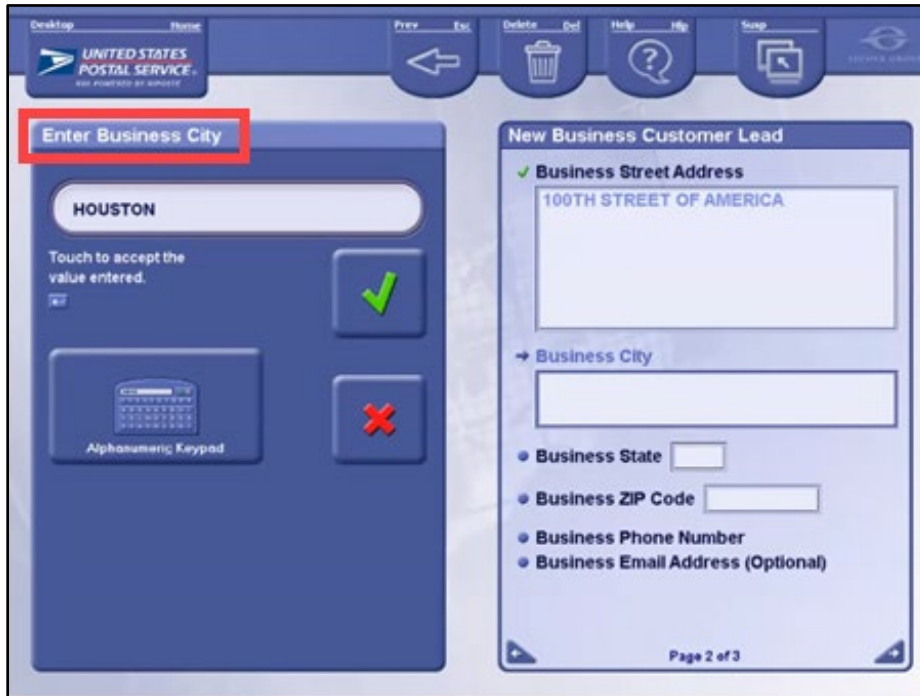

Figure 10

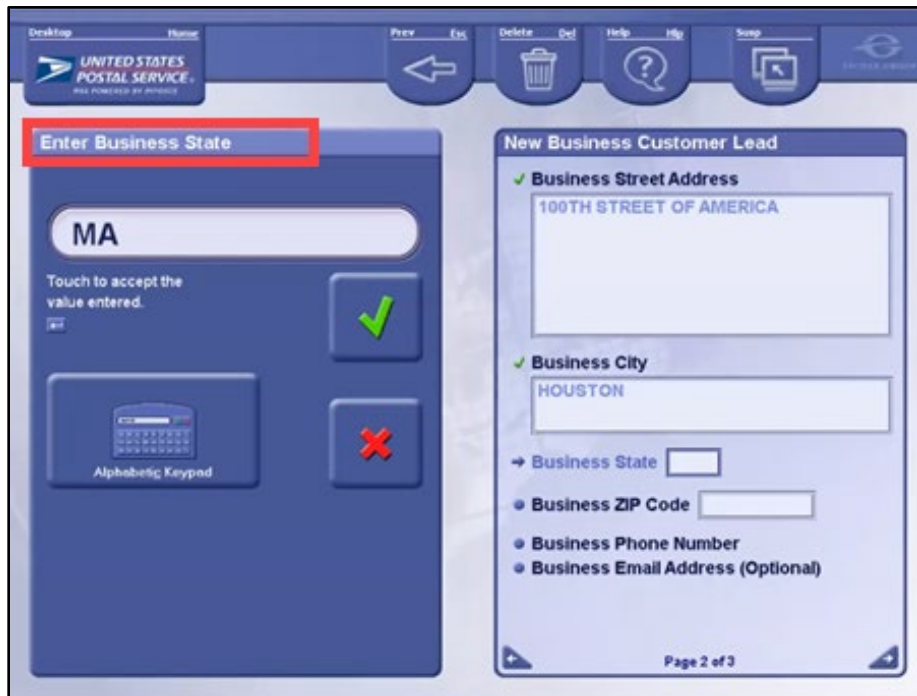Enter the city.

Figure 11

Enter the 2-digit state code.

Figure 12
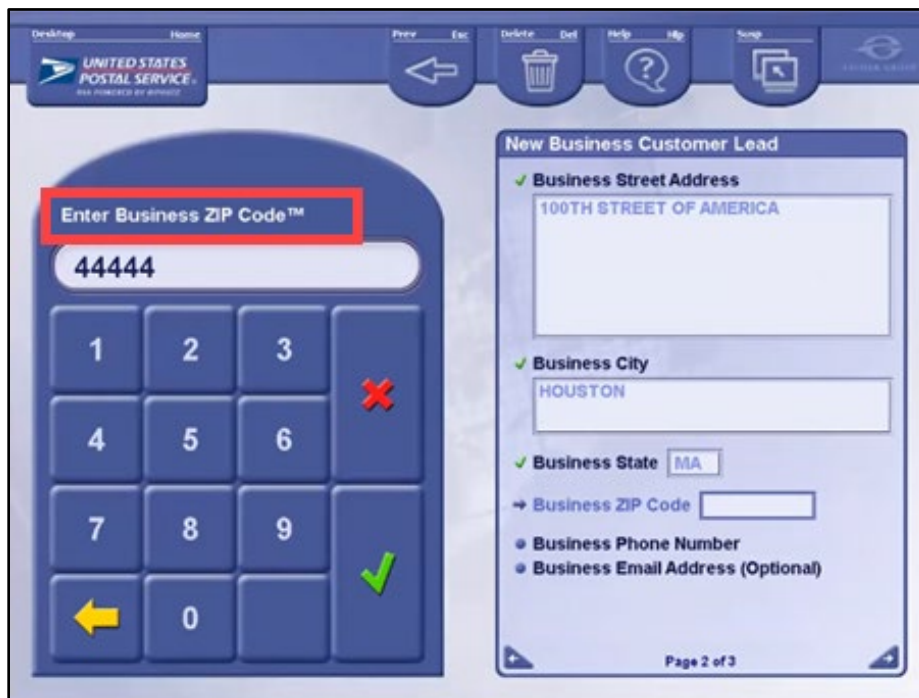
Enter the business' 5-digit ZIP Code.

Figure 13

The customer will be prompted on the CDU to enter a business phone number. The entry of a phone number is required to generate the lead.
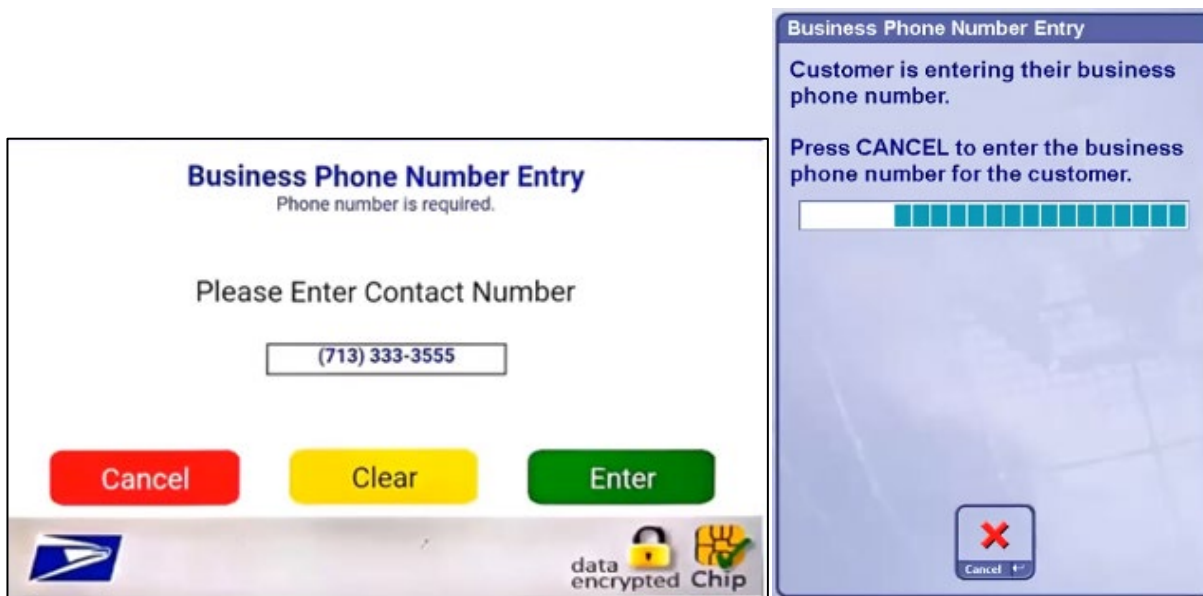

Figure 14

If the customer selects **Cancel** the following message will be displayed on the RA screen. For a customer lead to be generated, a business phone number must be entered.
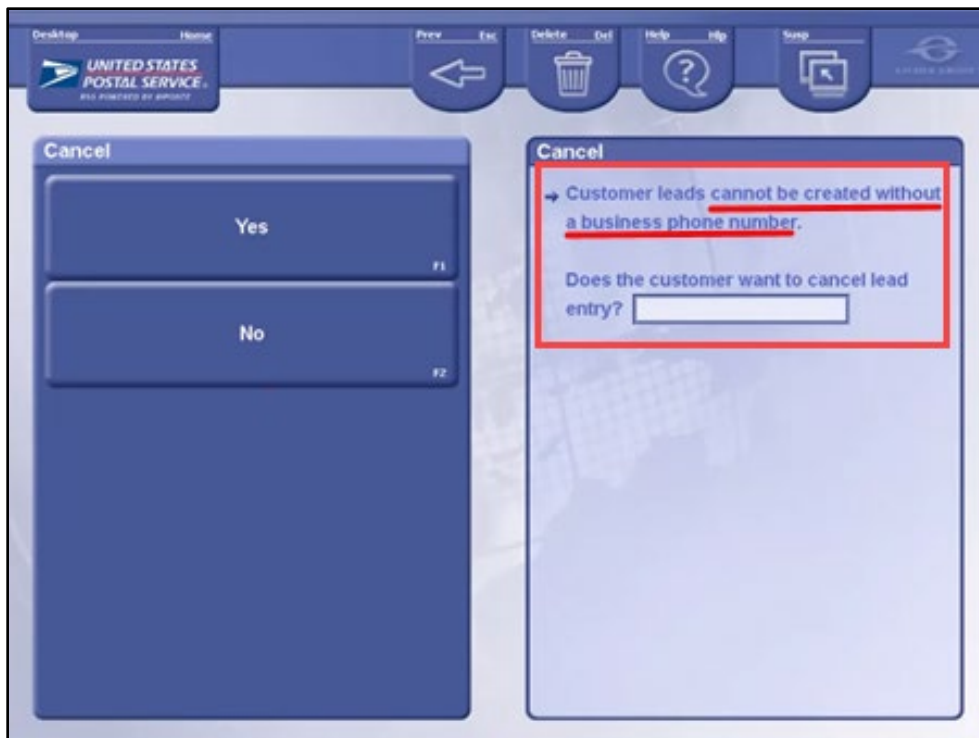
Figure 15

If the customer would like the lead cancelled, select **Yes**.

To redisplay the phone number entry screen on the CDU, select **No**.

After a phone number is entered, the customer will be prompted on the CDU to enter an email address. This entry is optional and can be bypassed with the customer selecting the red **Cancel** button.
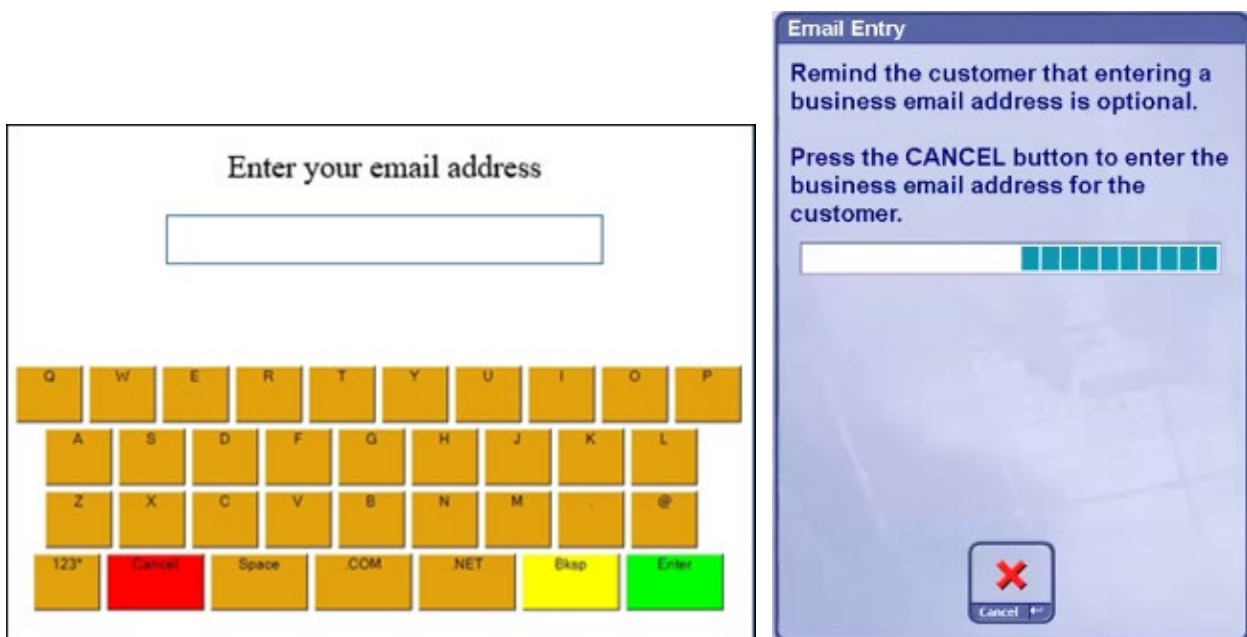

Figure 16

If the customer enters an email address, they will be prompted to verify that the entry is correct.
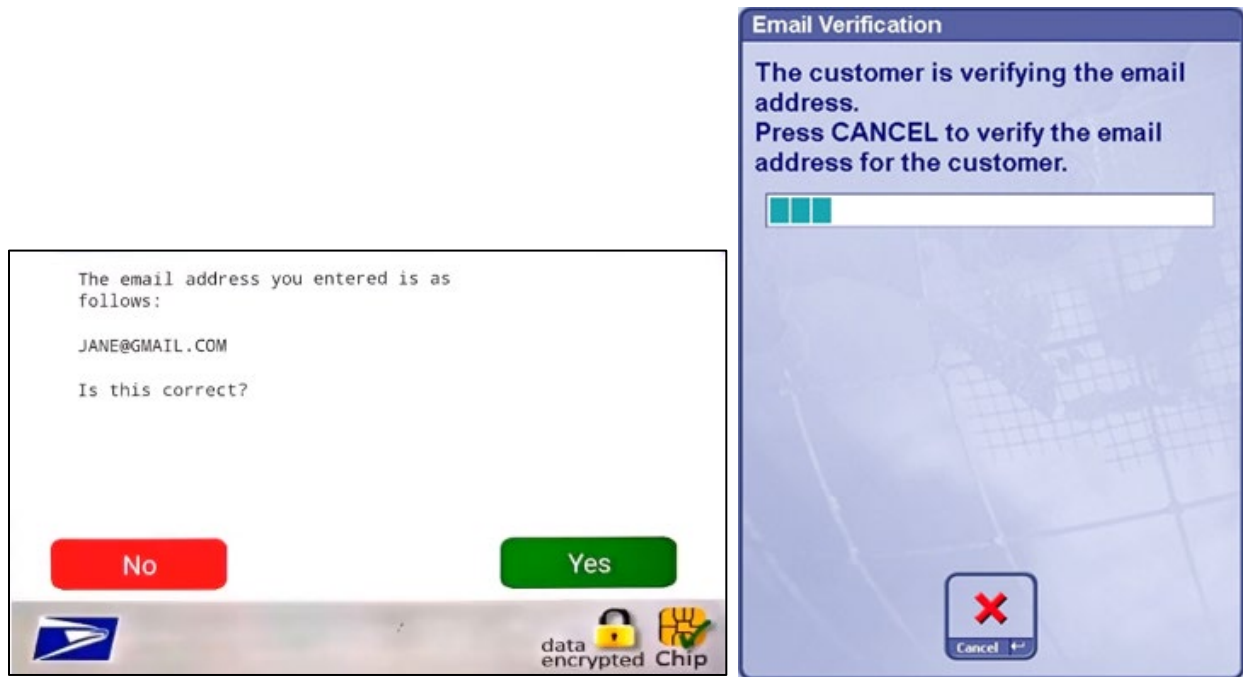

Figure 17

If the RA selects **Cancel** on the *Email entry* screen (Figure 15) to enter the business' email address on behalf of the customer, the entry screen is displayed with the corresponding message to the customer on the CDU. This is an optional entry and can be bypassed.
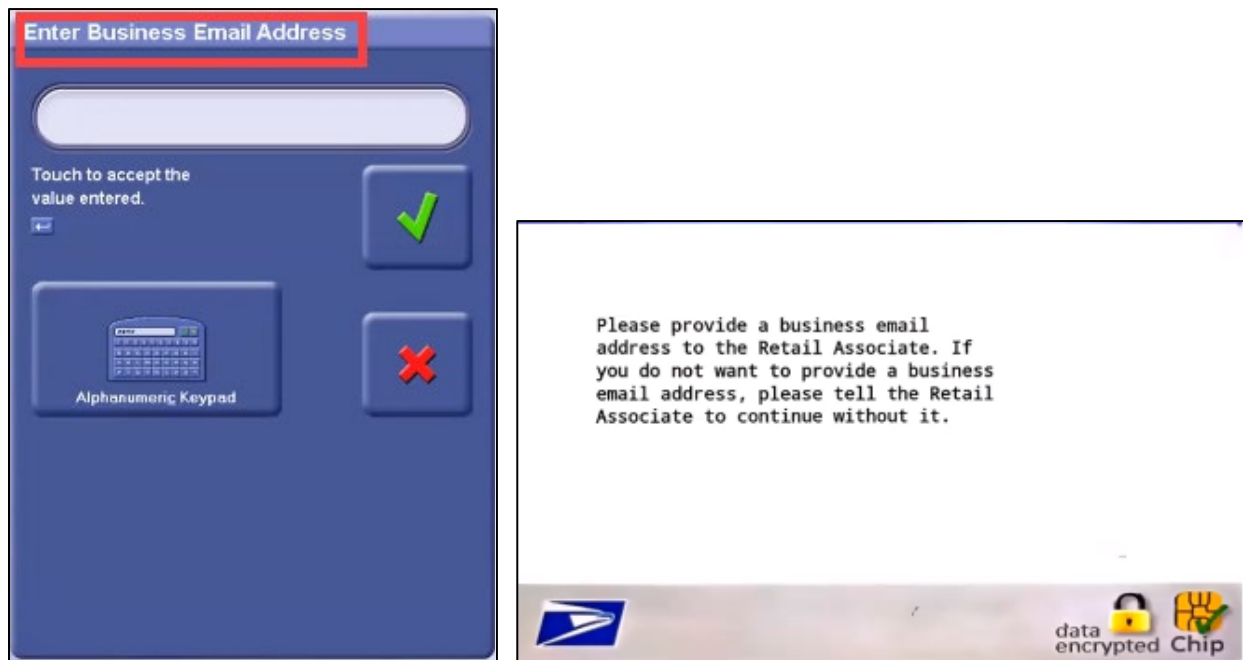

Figure 18

After entry of the email address, the customer will be prompted to verify the entered email and advise the RA if it is correct.
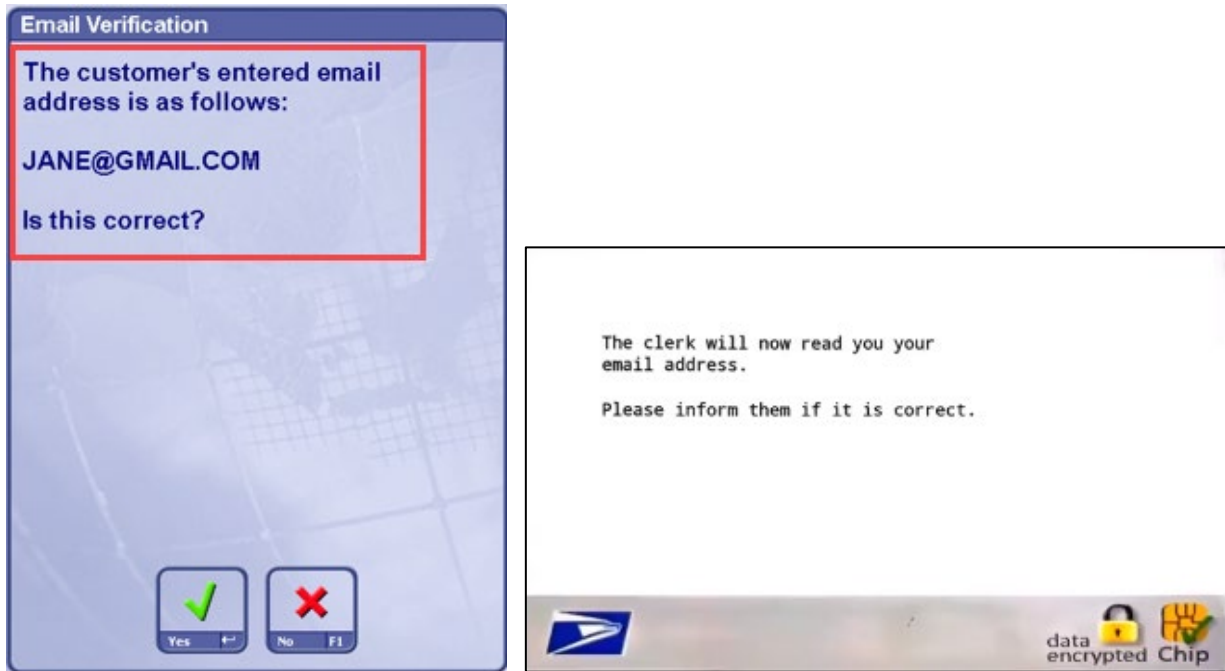

Figure 19

Select the USPS product type the customer is interested in using. This is a required entry and only <u>one</u> product type can be selected.
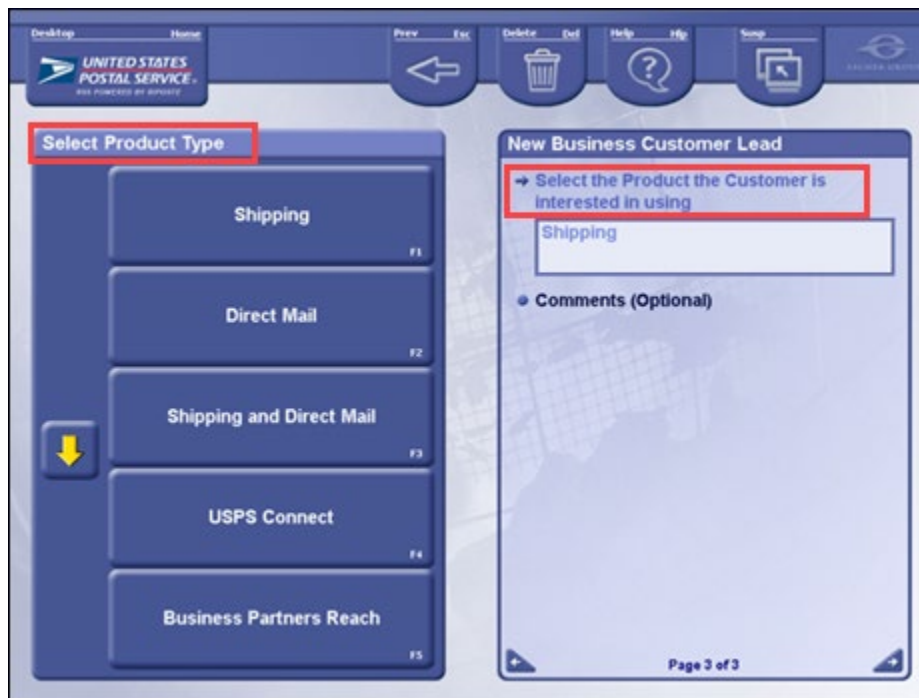

Figure 20

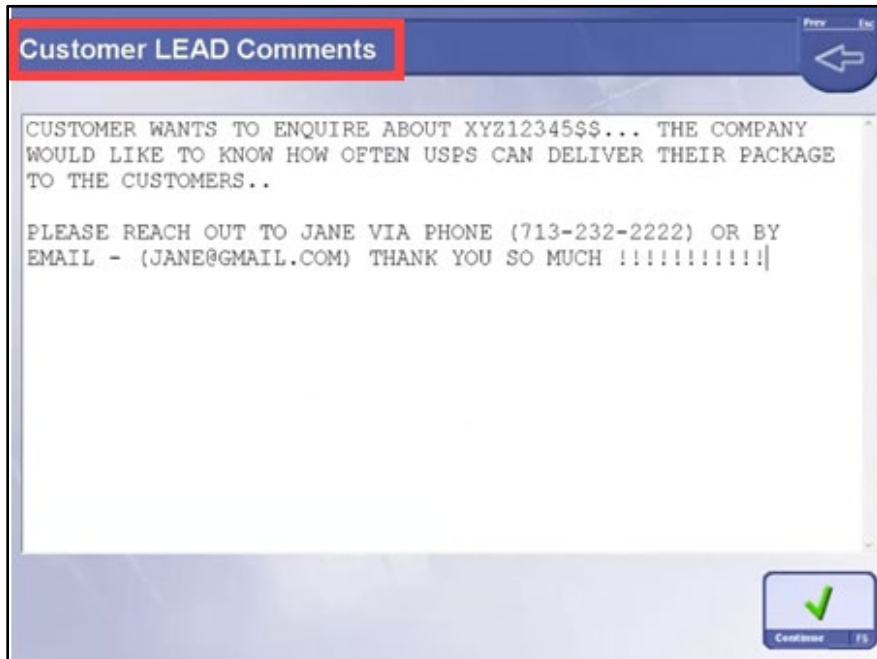If needed, add any additional comments from the customer. This is an optional entry.

Figure 21

After entry of any comments or to bypass the entry, select *Continue*.

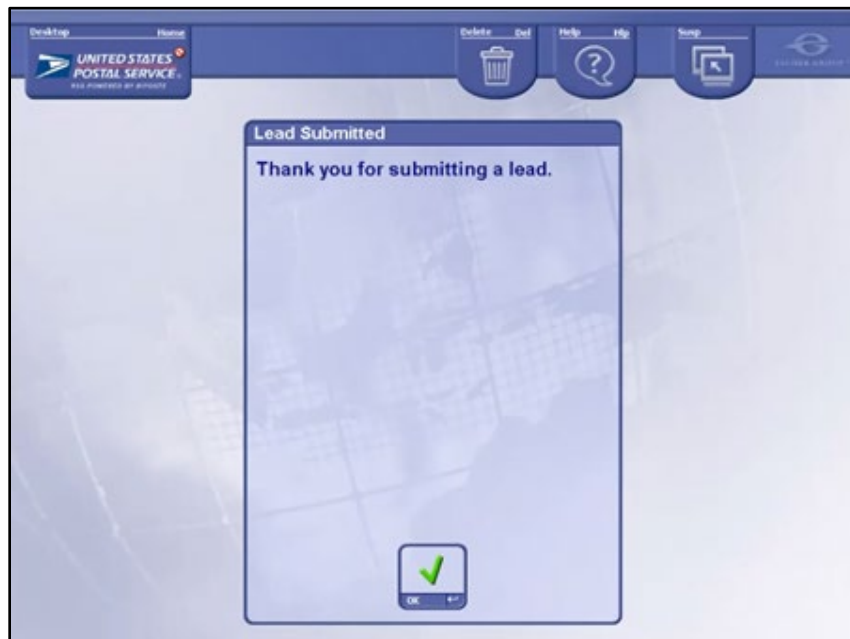A confirmation screen that the lead was submitted will be displayed.

Figure 22

Select *OK* to finalize the transaction. RSS will not print a receipt for this transaction.

3. View Leads

If an employee would like to review their submitted leads, select **View Leads** on the *LEADing Together* screen (Figure 2).
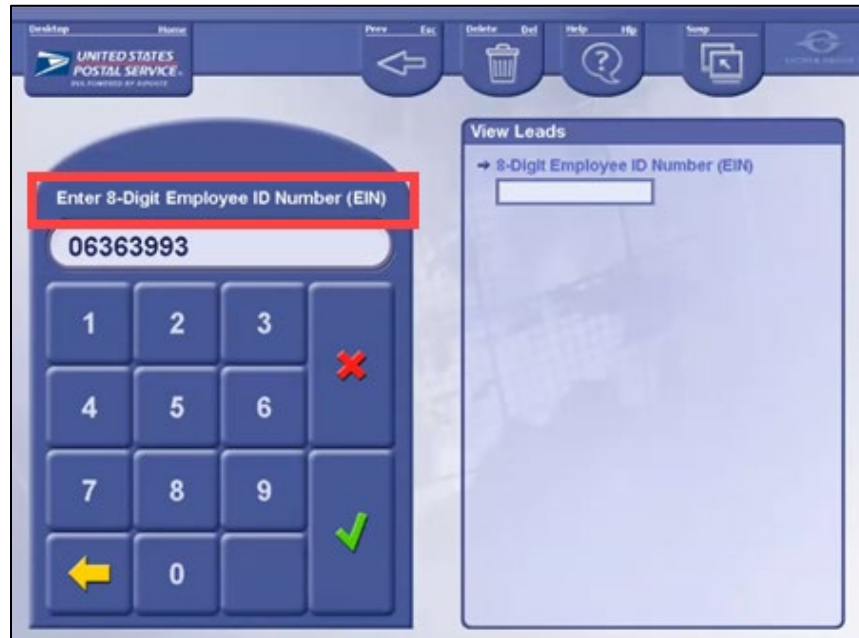
Enter the employee's 8-digit EIN number.

Figure 23

If there are no leads associated with the entered EIN, the following message will be displayed.
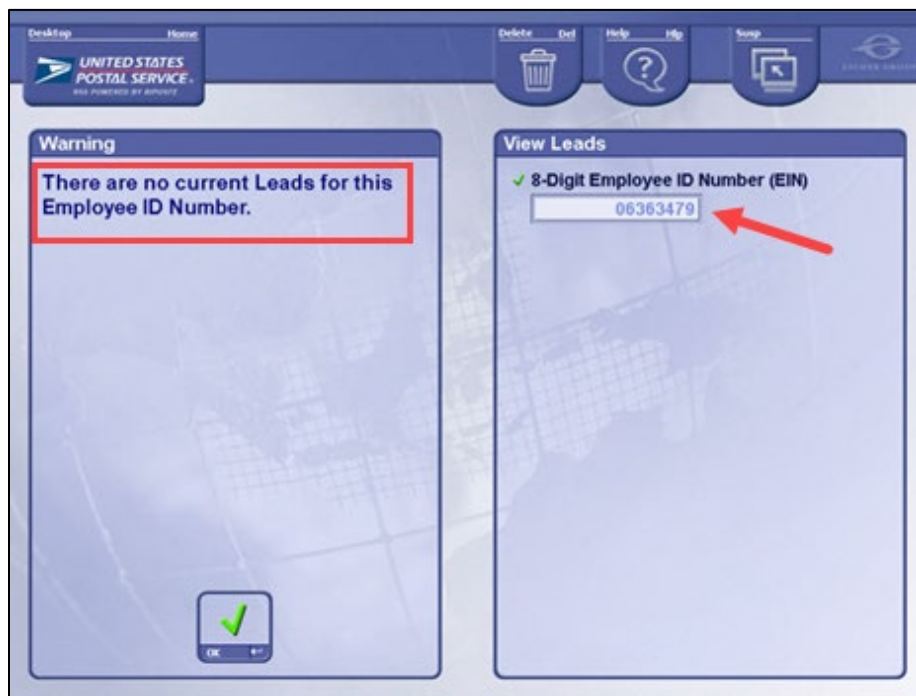

Figure 24

If there are business leads associated with the entered EIN, the *Business Customer Leads* screen will be displayed.
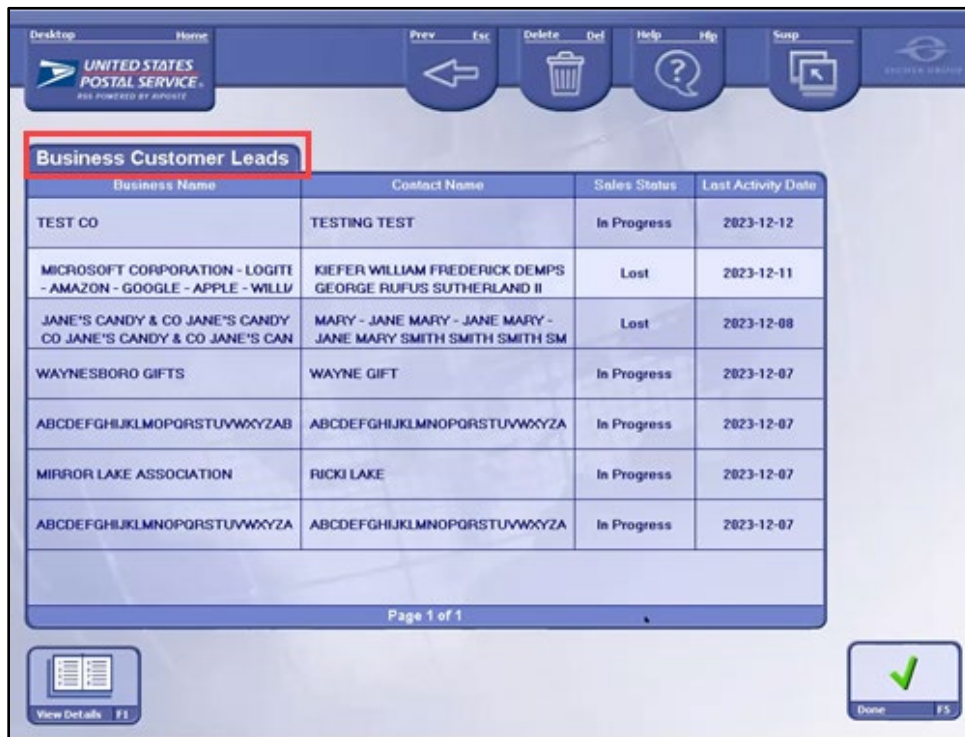

Figure 25

To view details of a specific lead, highlight the lead and select **View Details** on the bottom left of the screen.
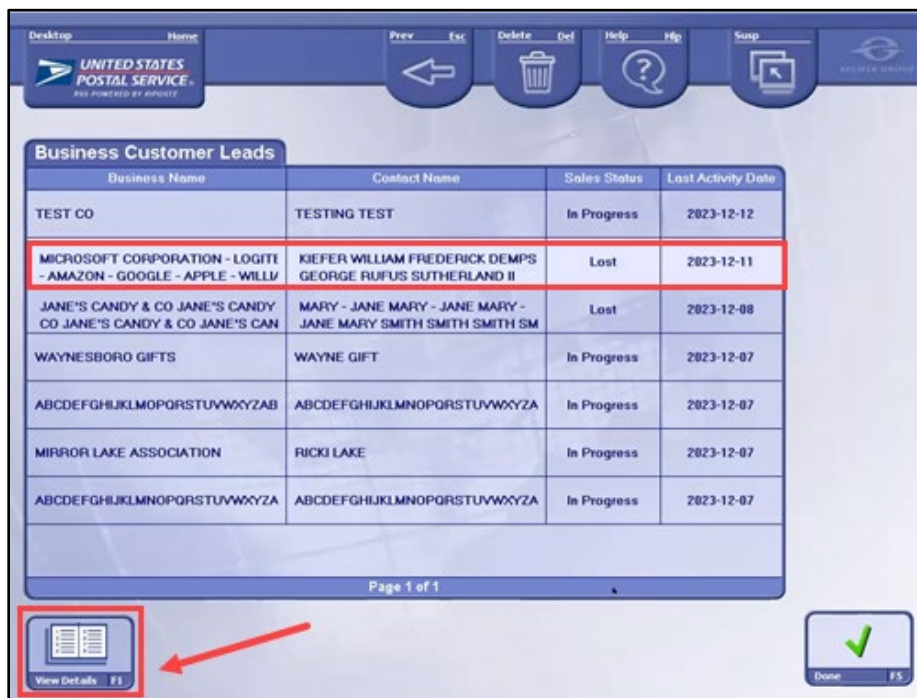

Figure 26

The *View Details* screen will be displayed for the highlighted entry.

Figure 27

After reviewing the information on the screen, select **Return**.

When finished reviewing the *Business Customer Leads* screen, select **Done** to return to the *LEADing Together* screen (Figure 2).

Figure 28

4.   Training Record

Record of RSS Update Training			
Software Release: LEADing Together New Functionality Guide			
Unit Name:			
Time: 15 Minutes per Retail Associate			
Name	**Employee Identification Number**	**Date**	**Time Used**
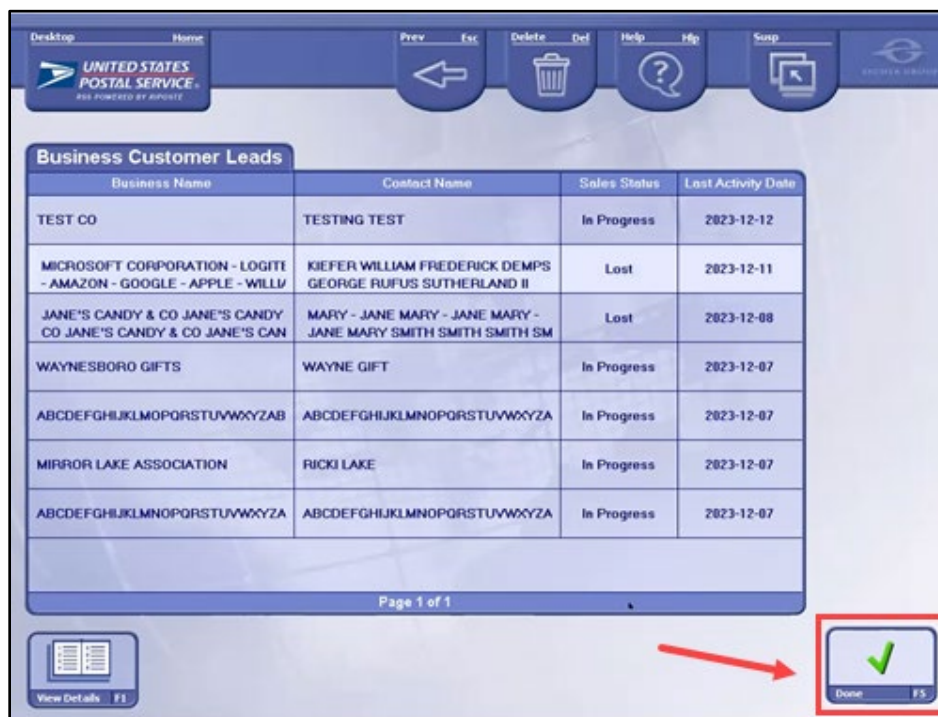
Area	District
Atlantic	North Carolina
Central	MN-ND
Southern	Florida 2
WestPac	California 5
Total	Piloted sites

Total	WTIL Score
119	100%
101	100%
100	100%
51	100%
371	