LABOR RELATIONS

UNITED STATES
POSTAL SERVICE

August 13, 2021

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

Certified Mail Tracking Number:
7020 3160 0002 0328 9016

Dear Brian:

As a matter of general interest, the Postal Service will conduct a proof of concept test that will evaluate expanding the role of Sales and Services Associates by enabling them to assist local and small businesses with sales and growth opportunities.

The subject test will commence on September 20 at the following locations:

Area	District	Office
Atlantic	New York 1	James A. Farley Station
Atlantic	New York 1	Grand Central Station
Southern	Florida 2	ORL-Sand Lake Br
Southern	Florida 2	ORL-ORL MO
Southern	Georgia	ATL-Atlanta MPO
Southern	Puerto Rico	MOWS San Juan
WestPac	Hawaii	HNL-Main Office Station
WestPac	California 3	Van Nuys MPO
WestPac	Alaska	ANC-Main Office
WestPac	California 4	El Toro Main Office
WestPac	California 5	LAX-Los Feliz Station

The Postal Service intends to train 11 Sales and Services Associates to perform the duties associated with the test. Beginning August 16, management at the above locations will solicit volunteers from each of the above locations to undergo the associated training and participate in the test. Training will commence no sooner than August 23.

Enclosed on compact disc are the materials that will be presented to participants during training. Please note, the subject training is derived from a pre-existing training course for Customer Care Agents.

(CA2021-293)

Please contact Mike Faber at 215-432-0613 if you have any questions concerning this matter.

Sincerely,

Shannon R. Richardson
Director
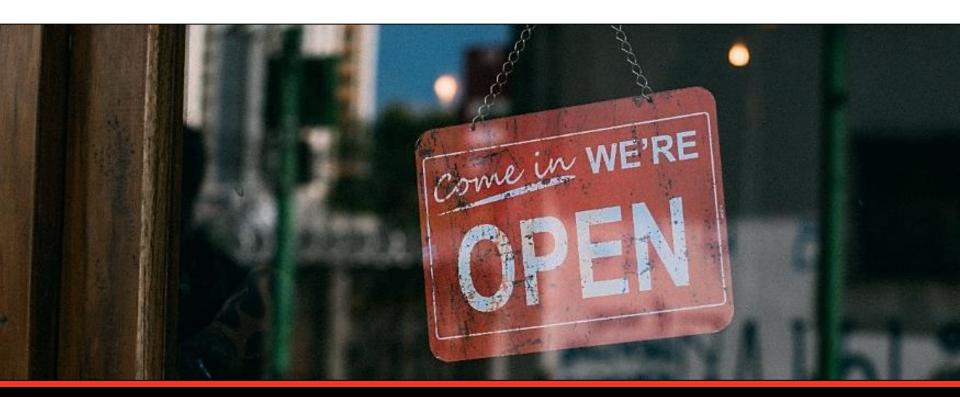Contract Administration (APWU)

Enclosure

Small Business Associate Training

SBA Training

Module 1: Course Introduction

This course will:

- Discuss the importance of the Small Business customer to the USPS.

- Explain your role in providing support to Small Business customers.

- Introduce and review USPS products and services that are useful to Small Businesses.

- Review call quality and introduce techniques for helping business customers.

- Demonstrate how to educate and guide customers in accessing tools and information at USPS.com.

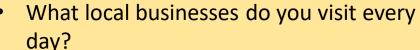**UNITED STATES POSTAL SERVICE**

- Module 1: Introduction to SBA

- Module 2: SBA Advanced Customer Service

- Module 3: USPS.com and Customer Registration

- Module 4: EDDM

- Course Assessment and Nesting

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Activity

- Do you or anyone you know own a Small Business?
- How do they reach their customers?
- How do the customers feel about the services they received?
- Do they recommend the place of business to their friends and family?

- What local businesses do you visit every day?
- How did you learn about them?
- Did you use a coupon?
- What was the service like?
- Was the experience one that you would repeat again?

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**Module Duration:
5 hours**

- Module 1: Introduction to SBA
    - Lesson 1: The USPS Small Business Market and Customer
    - Lesson 2: Your SBA Role
    - Lesson 3: Review Products and Services
    - Lesson 4: Resources
    - Lesson 5: Appointment Quality
- Module 2: SBA Advanced Customer Service
- Module 3: USPS.com and Customer Registration
- Module 4: EDDM
- Course Assessment and Nesting

	Best Practice
	• Do not rush ahead of the customer.
	• Check in with the customer.
	• Use active listening and ask further probing questions.

Learning Objectives

At the end of this lesson, you will be able to:

- Describe the importance of the Small Business Support Center
- Identify the Small Business customer

Lesson 1: The USPS Small Business Market and Customer

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> **We are people delivering to people™. We serve our customers by being efficient, reliable and easy to use while making our customers feel valued.**

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Video

Take Note

SBA Customer

- Pick Pack Warehouse
- Fulfillment Center
- Reach new customers
- Shipping Software
- Online platform
- Amazon, Big Commerce, eBay
- Application Programming Interface (API) – Integrated software
- Shopping Cart
- Advertise (catalog)
- Delivery
- Return Labels
- Return Merchandise
- Scheduled Pickups

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- There ar...
- Small bu... over $120 bill...
- Small Bu... er mailing ...
- The Post... **o Small Bu...** ...ratio...

Take Note

Small Business Facts

- 23 million Small Businesses in US
- Generate 9 billion in sales for USPS*
- $120 Billion spent on advertising
- Mail more frequently
- Higher mail volumes annually
- Time and money

customers are likely to choose the USPS.

USPS Priority: Customers

The customers you support will primarily fit the following mailing characteristics:

- 19% of respondents sampled are Small Businesses that spend between $5,000 and $30,000 annually with USPS.

- 41% of customers are Micro-Businesses, spending less than $5,000 annually with USPS.

- Businesses that contact the SBA have a median of 7 employees.

Activity

Activity Instructions:

Use the Raise Hand tool in Zoom to provide answers.

1. What are Small Business customers most concerned about?

   Time and money

2. How much do Small Businesses spend on advertising and direct mail campaigns?

   $120 billion

- **Module 1: Introduction to SBA**
    - Lesson 1: The USPS Small Business Market and Customer
    - Lesson 2: Your SBA Role
    - Lesson 3: Review Products and Services
    - Lesson 4: Resources
    - Lesson 5: Appointment Quality
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Lesson 2: Your SBA Role

Learning Objectives

At the end of this lesson, you will be able to:

- Identify reasons why Small Business Associates are important to the USPS
- Understand the SBA 's role

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Take Note

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Your SBA Role

Consultant
- Provide Customer Support
- Educate the customer
- Transfer and refer (if appropriate)
- Navigate customers on USPS.com

How Achieved?

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- Know an...
  benefits

- Ask prob...
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- Educate...
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  mailing r...

Take Note

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Your SBA Role

Consultant
- Provide Customer Support
- Educate the customer
- Transfer and refer (if appropriate)
- Navigate customers on USPS.com

How Achieved?
- Know USPS products and services
- Ask probing questions
- Master USPS.com
- Use proper resources

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Activity

Activity Instructions:

Use the Raise Hand tool in Zoom to provide an answer.

1. What is your primary role?

   As a specialized group with knowledge of Business Products, SBA Small Business Associate' primary roles are to:

   - Provide customer support to an important market segment.

   - Provide information on products and services that best match customers with mailing and shipping needs.

   - Transfer and refer customers to additional resources that best match their needs.

   - Guide customers on USPS.com pages to find information and register for access to services.

2. How will you achieve your role?

   - Knowing and understanding the features and benefits of USPS Products and Services.

   - Asking probing questions to determine the need of the customer.

   - Educating the customer on business services that match the customer's shipping and mailing needs.

   - Staying current on USPS.com to navigate customers.

   - Directing customers to proper resources using the Transfer and Referral guide.

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Learning Objectives

At the end of this lesson, you will be able to:

- Identify Small Business products and services
- Access Small Business general information in C360
- Define Business Mail Entry minimum requirements for Small Business products

Lesson 3: Review Products and Services

The SBA supports ALL of these USPS services

1. SSA Support
Click-N-Ship®
Claims (Domestic and International)
Change of Address
Domestic Mail Classes and Extra Services
International Mail Classes and Extra Services
Hold Mail
Mailing and Shipping Supplies
Package Service and Tracking
Pickup Services
PO Box™ / customer Service
Post Office™ Hours and Locations
Premium Forwarding Service®
Price Quotes
Redelivery
Stamps
USPS.com
ZIP Code™ Lookup

2. SBA Support
Click-N-Ship BusinessPro®
Business Customer Gateway®
Business Mail 101
Business Price Calculator
eBay®
Every Door Direct Mail®
Express Mail® Corporate Account (USPSCA)
Forms and Publications
Mail Preparation
Customized Direct Mail
PC Postage®
Permit Accounts
Postage Meters
PostalOne!®
Postal Explorer®
The Postal Store®
GoPost

San Francisco Salt Company

San Francisco Salt Co (Flat Rate Shipping)

0:00 / 1:28

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Take Note

SBA Customer

- Pick Pack Warehouse
- Fulfillment Center
- Reach new customers
- Shipping Software
- Online platform
- Amazon, Big Commerce, eBay
- Application Programming Interface (API) – Integrated software
- Shopping Cart
- Advertise (catalog)
- Delivery
- Return Labels
- Return Merchandise
- Scheduled Pickups
- eCommerce
- Shipper

Activity
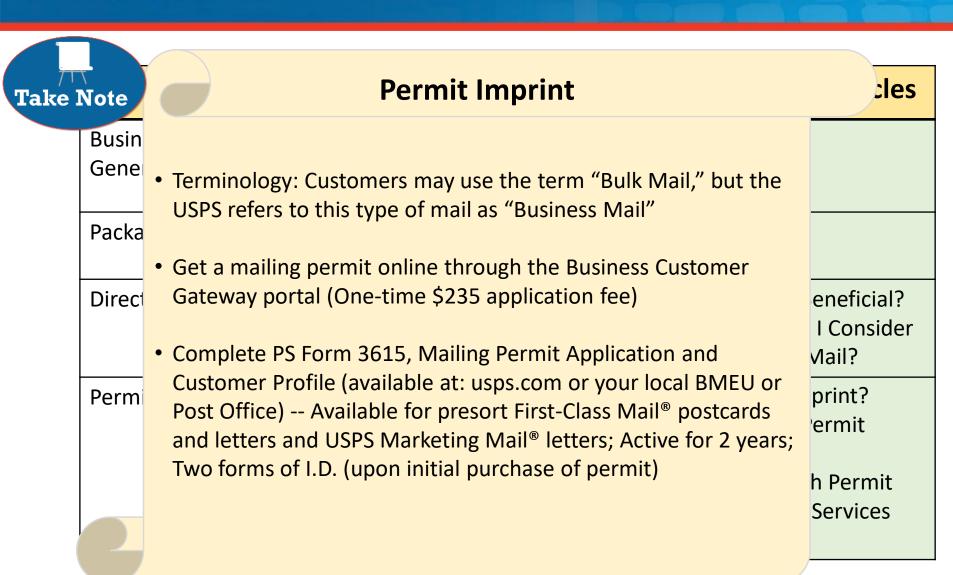
	Transit Time	Pricing Options	Included Services	Business Services
Priority Mail Express	**Overnight Guaranteed**	**Flat Rate Weight and Distance**	**Tracking $100 Insurance Signature Money Back Guarantee**	**Free Forwarding Return to Sender Address Correction Commercial Pricing**
Priority Mail	1, 2, or 3 Days	**Flat Rate Weight and Distance**	**Tracking $50 Insurance**	**Free Forwarding Return to Sender Address Correction Commercial Pricing**
First Class Mail	1 - 3 Days	**Letters up to 3.5 oz. Parcels up to 13 oz. Price based on weight**	**Tracking for Parcels**	**Free Forwarding Return to Sender Address Correction Commercial Pricing**
USPS Retail Ground	2 - 8 Days	**Oversized to 130" Length, Width & Girth Weight and Distance**	**Tracking**	**One Way Service Subject to Postage Due**
Media Mail	2 - 8 Days	**Restrictions apply Price based on Weight**	**Tracking**	**One Way Service Subject to Postage Due**

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Take Note

Permit Imprint

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Permi

cles

- Terminology: Customers may use the term "Bulk Mail," but the USPS refers to this type of mail as "Business Mail"

- Get a mailing permit online through the Business Customer Gateway portal (One-time $235 application fee)

- Complete PS Form 3615, Mailing Permit Application and Customer Profile (available at: usps.com or your local BMEU or Post Office) -- Available for presort First-Class Mail® postcards and letters and USPS Marketing Mail® letters; Active for 2 years; Two forms of I.D. (upon initial purchase of permit)

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Services

Activity

Activity Instructions:
1. Use Notepad to create "Flipchart" on the assigned topic(s).
2. Each flipchart must include:
   - Knowledge article title
   - PS Form #'s
   - Acceptance/induction (Retail, BMEU or both)
   - Features/benefits
   - Restrictions
   - Payment methods
3. Share your screen to show your flipchart and educate your classmates.

1. Bound Printed Matter
2. USPS Corporate Account
3. Library Mail
4. Marketing Mail (formerly Standard Mail)
5. Media Mail
6. Non-Profit Mail
7. Parcel Select
8. Periodicals
9. Presort First Class Mail
10. Retail Ground Service
11. Simple Sample

Knowledge Article: **Bulk Mail**

To qualify for certain postage discounts, you must mail a minimum number of pieces:

- 500 pieces per mailing Presorted First-Class Mail

- 200 pieces (or 50 pounds of mail) for USPS Marketing Mail (Standard Mail)

- 50 pieces per mailing for Parcel Select

- 300 pieces per mailing for Presorted or Carrier Route Bound Printed Matter

- 300 pieces per mailing for Library Mail

- 300 pieces per mailing for Media Mail

Activity

1. A customer needs to ship gift boxes valued at $75 to customers who recently won a sweepstakes. The winners are expecting to receive the gifts this Sunday. It is important that the package arrives on time and is delivered to the addressee only.

   What probing questions would you ask and what product would you recommend?

2. A customer needs to ship 30 CDs. The CDs are a gift to customers, so the customer does not want to spend a lot of money. As long as the CDs arrive within the month, the exact delivery date is not important.

   What product would you suggest?

Activity

Activity Instructions:

Use the annotation to mark the answers.

1. What is the minimum pieces of Marketing Mail a SBA customer can mail per day?

    ☒ 500 pieces

    ☒ 300 pieces

    ☑ 200 pcs (or 50 lbs) per mailing

    ☒ 50 pieces

    How many pieces of First-Class Mail® will a typical SBA customer mail per day?

    ☑ 500 pieces

    ☒ 300 pieces

    ☒ 200 pcs (or 50 lbs) per mailing

    ☒ 50 pieces

3. True or False. Standard Mail can be used for an advertising campaign with 150 mailing pieces weighing a total of 15 pounds?

    ☒ True

    ☑ False

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Learning Objectives

At the end of this lesson, you will be able to:

- Use C360 to guide you in asking appropriate probing questions

- Use guidelines in C360 to recommend products and services

- Access Small Business general information in C360

Lesson 4: Resources

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- **Business Activity:** Choose USPS products based on the activity they need to perform.

- **Mailing Quantities:** Narrow down available products based on the type and size of pieces your customer is sending.

- **Speed Requirements:** Narrow down the selection by how fast or when your customer needs their pieces delivered.

- **Product Options:** Help select the best product based on additional characteristics that are important to your customer.

Knowledge Article: **Additional Recommendations for the SBA Customer – Advisor Guidelines**

Knowledge Article: **Additional Recommendations for the SBA Customer – Advisor Guidelines**

Scenario:

Your customer is interested in mailing Promotional mail pieces to his customers.

Your customer is a hospital administrator that is hosting a Charity Ball in six months. This is a very important fundraising event.

These invitations will be going to all their top donors.

Another department sends out mail all the time and they get a discount.

Customer wants to know if they can use that discount for the invitations?

Activity

Activity Instructions:

1. Open C360.

2. Enter **SBA** in the Search field.

3. Click **Search**.

4. Locate and open **Flagship: SBA**.

If the customer needs ...	Refer to:
Assistance determining what product (Priority Mail, Reply Mail, etc) they should use:	• Decision Tree - Recommend a USPS Product - Advisor Guidelines • Reference - Industry Table
Assistance determining how they can most effectively prepare, pay for and send their mailings:	Decision Tree - Recommend Ways of Working with USPS - Advisor Guidelines
Basic information on bulk mail: getting started, minimums, mailing lists, referral information, etc.:	Bulk Mail
Specific assistance (for example: applying for an USPSCA account, how to file an insurance claim, etc.)	• SBSC: Handling Small Business Support Center Transfers & Referrals - Advisor Guidelines • Flagship: Business Services General Information
Information on pricing incentives (discounts)	Price Incentives & Business Mail Pricing Factors
Information on Mail Classes & Services	• Direct Mail • Reply Mail and Return Services • Create Mail Online (formerly NetPost) • Caller Service • Post Office Boxes Online (POBOL) • Intelligent Mail for Small Business

Knowledge Articles:

- **Flagship: SBA**
- **Decision Tree - Recommend a USPS Product - Advisor Guidelines**
- **SBA: Handling Small Business Support Center Transfers & Referrals - Advisor Guidelines**

Customer is interested in mailing Promotional mail pieces to his customers.

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Activity

Knowledge Article: **Reference - Industry Table - Advisor Guidelines**

If customer provides industry...	Background information...	Recommend the following...
Industry	**Industry Factors**	**Recommendations**
Services • Legal Services • Real Estate • Insurance	• Greatest source of package volume for USPS • Largest mailer of Priority Mail Express • Largest mailer of Priority Mail • More likely to deposit mail at the Post Office or a Drop Box than use Package Pickup	Recommend Package Pickup/ Pickup on Demand • Package Pickup is available at: www.usps.com > Ship a Package > Schedule a Pickup as option • Pickup on Demand is available for a $20.00 fee
Non-Profit Organizations	Eligible non-profits include: • Religious • Educational • Scientific • Philanthropic (Charitable) • Agricultural • Labor • Veterans • Fraternal • Certain political committees Organizations must apply for non-profit prices where they will do their mailing Non-profit prices apply only for standard mailing	Provide information on how to apply for non-profit status and what information customers will need to provide as proof of non-profit eligibility

Customer is interested in mailing Promotional mail pieces to his customers.

Activity

Activity Instructions:

Use Chat or the Raise Hand tool in Zoom to provide an answer.

1. "I need to send 120 valuable small packages by the end of next week to our top clients. Each package weighs nine ounces. What is the best way to send them?"

   Probing questions: What is the value? Where are they going? What is the best way to send them? Local customers in a county or city or along the East Coast, throughout the country? The answers may lead to solutions such as First Class Mail with insurance, Priority Mail Small Flat Rate (PMSFR) that comes with $50 ins.; more can be added and we can provide the boxes; or, volume and induction driven pricing with a permit.

2. "Between client orders and gifts, it is typical for us to send 175 packages per week. The post office is on the other side of town and I need help speeding up this process."

   Probing question: What shipping software are you using? Recommendations may be made here depending on answers. We can offer free pickups scheduled on USPS.com -- saving fuel, drivers, and time.

3. Fill in the blank. A Small Business customer can be further defined by the _____ to which they belong.

   Industry

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Activity

Knowledge article: **Decision Tree – Recommend Ways of Working with USPS – Advisor Guidelines**

Cheng is a new Small Business customer who only mails a few packages a week, but wants to make sure they get to his customers as quickly as possible. His business has gotten busy recently, but he has not been able to hire an assistant. He is interested in how the USPS can help him save time and cut down on administrative tasks.

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Activity

Knowledge article: **Decision Tree – Recommend Ways of Working with USPS – Advisor Guidelines**

Jane is a longtime USPS Small Business customer who typically mails 50 international mail pieces a week (letters and packages) using Priority Mail®. She wants to know if there are any new products or services that can help her get her mailings out the door quickly.

Activity

Activity Instructions:

Use Chat to provide an answer.

What do you recommend?

1. Your customer indicates they typically send 60 packages or letters a week and at times, it is important that postage is not displayed to the client.

   Create labels online using stealth postage or PC Postage with stealth postage options.

2. The closest Post Office is 20 miles away, so they would like an option that doesn't require them to go to the Post Office.
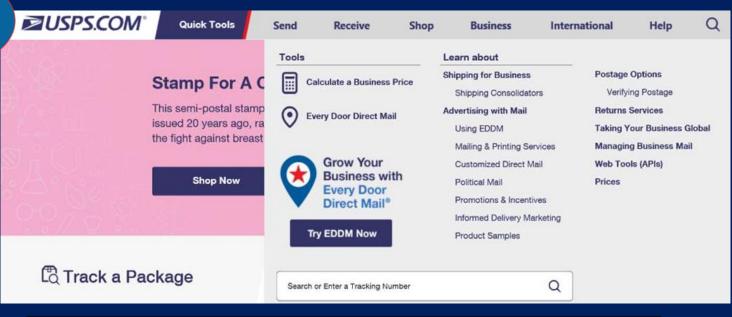
   Schedule daily pickups online at USPS.com.
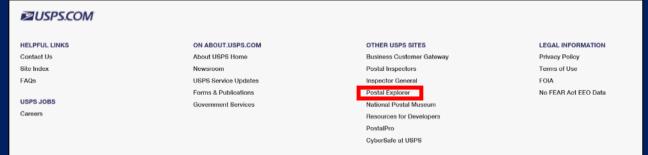
3. Your customer is also looking for a way to combine some of their tasks. For instance, they need to run expense reports every week to determine their shipping costs and if they could do this while placing shipping orders it would save time.

   PC Postage options are able to integrate with warehouse systems that can create reports for different functions within the company.

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Demo
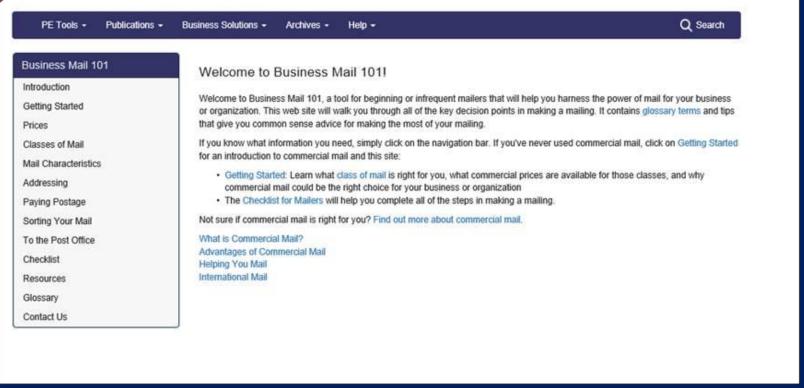
USPS.COM Postal Explorer

PE Tools ▾   Publications ▾   Business Solutions ▾   Archives ▾   Help ▾   Q Search

Business Mail 101

Introduction
Getting Started
Prices
Classes of Mail
Mail Characteristics
Addressing
Paying Postage
Sorting Your Mail
To the Post Office
Checklist
Resources
Glossary
Contact Us

Welcome to Business Mail 101!

Welcome to Business Mail 101, a tool for beginning or infrequent mailers that will help you harness the power of mail for your business or organization. This web site will walk you through all of the key decision points in making a mailing. It contains glossary terms and tips that give you common sense advice for making the most of your mailing.

If you know what information you need, simply click on the navigation bar. If you've never used commercial mail, click on Getting Started for an introduction to commercial mail and this site:

- Getting Started: Learn what class of mail is right for you, what commercial prices are available for those classes, and why commercial mail could be the right choice for your business or organization
- The Checklist for Mailers will help you complete all of the steps in making a mailing.

Not sure if commercial mail is right for you? Find out more about commercial mail.

What is Commercial Mail?
Advantages of Commercial Mail
Helping You Mail
International Mail

http://pe.usps.com/businessmail101/

Activity

Activity Instructions:

Complete the Postal Explorer worksheet in the Participant Guide.

1. Name two organizations that qualify for non-profit prices.

2. What are the first two steps in the Checklist for Mailers?

3. The Postal Service offers lower prices for commercial mailings because… (complete the sentence)

4. Where would you find information on Permit Imprint?

5. Where you find the link, Hazardous, Restricted, and Perishable Mail?

Answer:
Mail Characteristics > What is Mailable?

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1. What are the four types of probing questions to ask Small Businesses?
   1. Business Activity
   2. Mailing Quantities
   3. Speed Requirements
   4. Product Options

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Learning Objectives
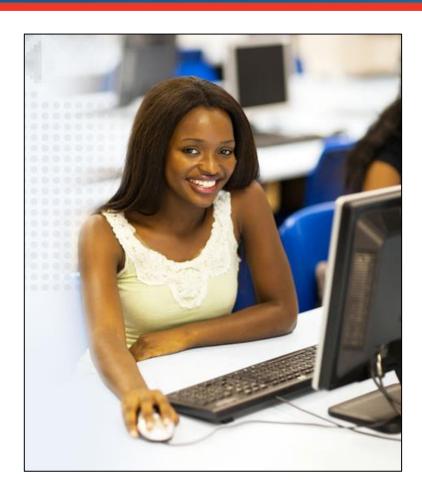
At the end of this lesson, you will be able to:

- Review how to search for existing Business accounts and create a new account for a Business in C360

- Identify the call flow.

- Use appropriate call techniques to assist customers.

Lesson 5: Appointment Quality

Although your visits may come from specific industry types, remember:

- All products and services may apply

- Use your visit experience to determine:
    - How to help
    - What to suggest
    - What the alternatives are

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Visit Opening

Creating Person Accounts

Existing Business Accounts

Duplicate Account Warnings

Duplicate Account Warning

When you are creating a new Person Account or Contact, C360 will run a duplicate check to verify that the customer does not already exist.

Matching information in the following fields trigger a warning:

- First Name, Last Name, Phone, and ZIP Code

- First Name, Last Name, Email, and ZIP Code

- First Name, Last Name, Phone Number, Email, and ZIP Code
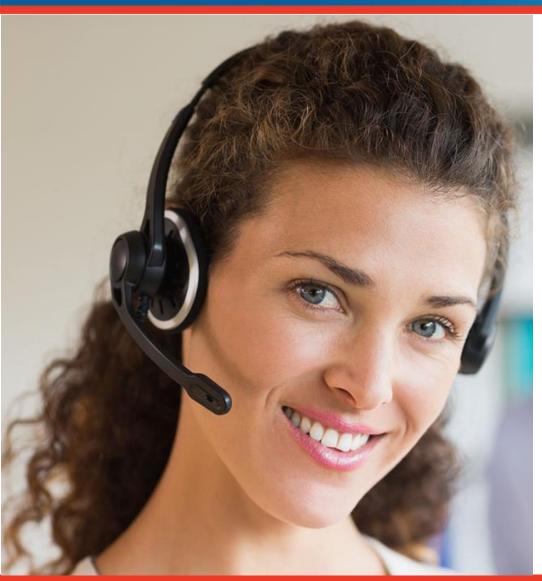
- Open the call.

- Capture the Why.

- Reassure the customer.

- Verify.

- Empathize or apologize.

- Educate the customer.

- Answer questions on Products and Services **before** referring to advanced customer care.

- Navigate on USPS.com.

- Close the call.

	Best Practice
	• Business Related Terminology • Answer questions/educate customer **before** transfers/referrals • Navigate USPS.com • Invite to call back

- Ask Probing Questions.

- Act as a consultant on products and services.

- Utilize the Industry Table to identify customers with similar mailing behaviors and characteristics.

- Understand and offer reduced pricing when the customer qualifies for quantity discounts.

- Educate the customer on Bulk Mail Entry requirements.

- Offer Guidance on USPS.com.

Activity
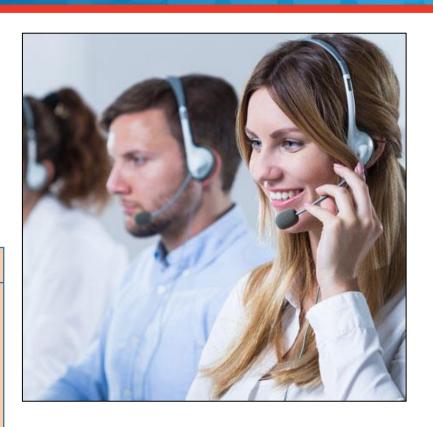
- Assume the roles of for the next series of scenarios.

- Using product knowledge and good call skills, enact Business Quality visits.

Best Practices
• Have -- and practice -- three main features/benefits to describe products and services. • Check in with the customer to verify you are on the correct path. • Use best practices of customer care and call quality. (e.g., "I would be happy to assist you.") • Use your resources.

Activity

Activity Instructions:
1. Assume the role of a Small Business Associate .
2. Use product knowledge and good call skills to enact quality visits.
3. Practice modeled language on slide.
4. Use probing questions.

Non-Profit

Customer: "How do I start mailing as a Non-Profit organization?"

- Must meet specific standards and have received special authorization from the USPS are eligible to mail at Nonprofit Marketing Mail prices.
- Nonprofit mail must meet the eligibility requirements for Standard Mail.
- Fees and restrictions apply.

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Activity

Activity Instructions:
1. Assume the role of a Small Business Associate .
2. Use product knowledge and good call skills to enact quality visits.
3. Practice modeled language on slide.
4. Use probing questions.

PO Boxes

Customer asks, "Our company receives checks daily and our mail arrives after 2pm. Can we get our mail earlier?"

- As many Small Businesses operate out of their home, a PO Box provides a private, secure location for receiving and sending business mail.

- Customers can open PO Boxes in multiple locations and continue to grow their business.

- PO Box Mail is scheduled to be delivered in

  boxes earlier than street delivery addresses.

Activity

Activity Instructions:
1. Assume the role of a Small Business Associate .
2. Use product knowledge and good call skills to enact quality visits.
3. Practice modeled language on slide.
4. Use probing questions.

Commercial Mailing

Customer asks, "I need information about commercial mailing."

- Also referred to as "Business, Bulk, or Presorted Mail"
- Refers to quantities of mail prepared for mailing with reduced prices
- For customers who ship large volumes and are willing to do some of the preparation themselves
- Must apply for a Mailing Permit in order to take advantage of this service

Activity Instructions:
1. Assume the role of of a Small Business Associate .
2. Use product knowledge and good call skills to enact quality visits.
3. Practice modeled language on slide.
4. Use probing questions.

Activity

Mailing List

Customer says, "I need a mailing list to send invitations to our Grand Opening of our new location. Can the post office help me with that?"

- The Postal Service™ does not maintain address lists of individuals and/or organizations.
- Mailing lists can be rented or purchased through Mailing List Brokers.
- Create a house list from your current customers and your previous customers.

Activity

Activity Instructions:

Use the Raise Hand tool in Zoom to provide an answer.

1. What are the first two steps in the meeting flow?
   - Open the call
   - Capture the Why
   - Reassure the customer.
   - Verify.
   - Empathize or apologize.
   - Educate the customer.
   - Answer questions on Products and Services
   - Navigate on USPS.com.
   - Close the call

2. You will use your call experience to determine _____, _____, and _____.
   - How to help
   - What to suggest
   - What the alternatives are

Activity

Activity Instructions:

Use the annotation tool to provide answers to each question.

1. Which of the following statements about Small Businesses is true?

2. As SBA Small Business Associate, you will measure success by:

3. To qualify for certain postage discounts, you must mail a minimum

4. What is the phone number for the Small Business Support Center?

5. **When customers show signs of frustration or distress, what should you do to exhibit good call quality skills?**

- ☒ Escalate the call

- ☑ Apologize for their situation

- ☒ Advise them to stay calm

- ☑ Empathize with them

Small Business Support Center

Message from the Post Master General

"The future is all about the customer. We have to listen and quickly adapt to their needs."

"Our customers have a choice on who they do business with. When we commit to adding value, we build loyalty and trust."

You Can Make a Difference!

Congratulations!

You have completed Module 1.

United States Postal Service — Customer Care Center

Small Business Associate Training

Advanced Customer Service

UNITED STATES POSTAL SERVICE

Module Duration: 6 hours

- Module 1: Introduction to SBA

- Module 2: SBA Advanced Customer Service
  - Lesson 1: Product Value Proposition
  - Lesson 2: Quick Service Guides
  - Lesson 3: Business Services
  - Lesson 4: Transfers and Referrals
  - Lesson 5: Documentation and Escalation
  - Lesson 6: Capture the Why

- Module 3: USPS.com and Customer Registration

- Module 4: EDDM

- Course Assessment and Nesting

Best Practice
• Do not rush ahead of the customer. • Check in with the customer. • Use active listening and ask further probing questions.

Learning Objectives

At the end of this lesson, you will be able to:

- Describe the value of USPS products and services
- Identify USPS products and services that meet the customer's need

Lesson 1: Product Value Proposition

Innovations in Targeting

What does the video illustrate?

Get the right message/product out to the right people, at the right time.

How does this relate to our roles as an SBA?

We can target our customers by identifying their needs and employing effective product value matching offerings.

- Take the time to uncover the customer's **need** in order to move forward in a mutually beneficial way.

- Simple lack of **knowledge**, **perception** issues, and unclear **language** are common causes for delaying a customer moving forward.

Take Action:

- Empathize
- Let the Discovery Begin
- Show The Value

Match the customer's need by speaking to the value of the products and services:

- Describe and offer products that best address customer's request

- Describe and offer higher value products that may address customer's need beyond initial request

- Describe and offer related products/services in addition to the customer's request

UNITED STATES POSTAL SERVICE

Activity

Knowledge article: **Decision Tree –
Recommend Ways of Working with USPS – Advisor Guidelines**

Activity Instructions:

1. The Instructor will be the customer and a volunteer will be the "visitor."

2. The "visitor," with assistance from the class in Chat, will provide assistance with product value matching.

Scenario 1

Jane sells jewelry through her online store. The jewelry is not of high value. Customers rely on prompt secure delivery.

What products and services can we offer?

What the Customer Chose

- Chose Priority Mail Small Flat Rate, tracking, and $50.00 insurance included

- Ordered free boxes on USPS.com

- Will create labels on Click-N-Ship

- Will schedule free pickups

UNITED STATES POSTAL SERVICE

Activity

Knowledge article: **Decision Tree – Recommend Ways of Working with USPS – Advisor Guidelines**

Activity Instructions:

1. The Instructor will be the customer and a volunteer will be the "visitor."

2. The "visitor," with assistance from the class in Chat, will provide assistance with product value matching.

Scenario 2

Jon represents an organization that received donations and wants to send out a letter of thanks to contributors. The addressees are residents and businesses located in the county.

What's the best way to do that?

Can we give the Post Office a list and have them sent?

What recommendations can we offer?

What the Customer Chose

Jon chooses to contact a local printer as a service provider for their mailing.

UNITED STATES POSTAL SERVICE

Activity

Knowledge article: **Decision Tree –
Recommend Ways of Working with USPS – Advisor Guidelines**

Activity Instructions:

1. The Instructor will be the customer and a volunteer will be the "caller."

2. The "caller" with assistance from the class in Chat, will provide assistance with product value matching.

Scenario 3

The manager of a manufacturing company needs to send out recall notices for a product to their customers. He has a permit. The addresses are located all over the country. It's a two-page letter.

What solution can we offer?

What the Customer Chose

Send pre-sorted first-class mail using a mail service provider.

UNITED STATES
POSTAL SERVICE

Activity

Knowledge article: **Decision Tree –
Recommend Ways of Working with USPS – Advisor Guidelines**

Activity Instructions:

1. The Instructor will be the customer and a volunteer will be the "visitor."

2. The "visitor," with assistance from the class in Chat, will provide assistance with product value matching.

Scenario 4

My name is Michael, I just called to get more information for setting up a permit. Is this Walnut Creek office?

How can we help Michael?

What the Customer Chose

Advise the customer that we are SBA and find out where in the process he is in the application.

SBAs can access the permit application online, follow along with the customer, and advise next steps.

1. What are common issues that prevent or delay a customer moving forward on a solution?

   Simple lack of knowledge, perception issues, and unclear language

2. True or False? Effective product value matching involves only giving the customer the product/service they requested.

   False. Effective product value matching may include offering customers higher value products or additional related products to truly match their needs.

3. True or False? You can refer to the Decision Trees found in C360 to help you determine how to assist your customers with their Small Business mailing needs.

   True

- Module 1: Introduction to SBA
- Module 2: SBA Advanced Customer Service
    - Lesson 1: Product Value Proposition
    - Lesson 2: Quick Service Guides
    - Lesson 3: Business Services
    - Lesson 4: Transfers and Referrals
    - Lesson 5: Documentation and Escalation
    - Lesson 6: Capture the Why
- Module 3: USPS.com and Customer Registration
- Module 4: EDDM
- Course Assessment and Nesting

Lesson 2: Quick Service Guides

Learning Objectives

At the end of this lesson, you will be able to:

- Navigate to the Quick Service Guides

1. True or False? The "Customer's Guide to Mailing" is an internal resource for USPS SBAs only.

   False. The Customer's Guide to Mailing is customer-facing and SBAs can direct customers here to research their questions.

2. True or False? Non-machinable letters qualify for automation prices.
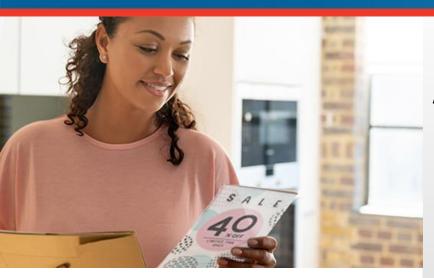
   False. Only machinable letters may qualify for automation prices.

- Module 1: Introduction to SBA
- Module 2: SBA Advanced Customer Service
    - Lesson 1: Product Value Proposition
    - Lesson 2: Quick Service Guides
    - Lesson 3: Business Services
    - Lesson 4: Transfers and Referrals
    - Lesson 5: Documentation and Escalation
    - Lesson 6: Capture the Why
- Module 3: USPS.com and Customer Registration
- Module 4: EDDM
- Course Assessment and Nesting

Learning Objectives

At the end of this lesson, you will be able to:

- Identify Small Business payment methods
- Identify Small Business shipping options
- List the characteristics of Business Reply Mail
- Identify characteristics of Small Business services

Lesson 3: Business Services

![United States Postal Service logo]
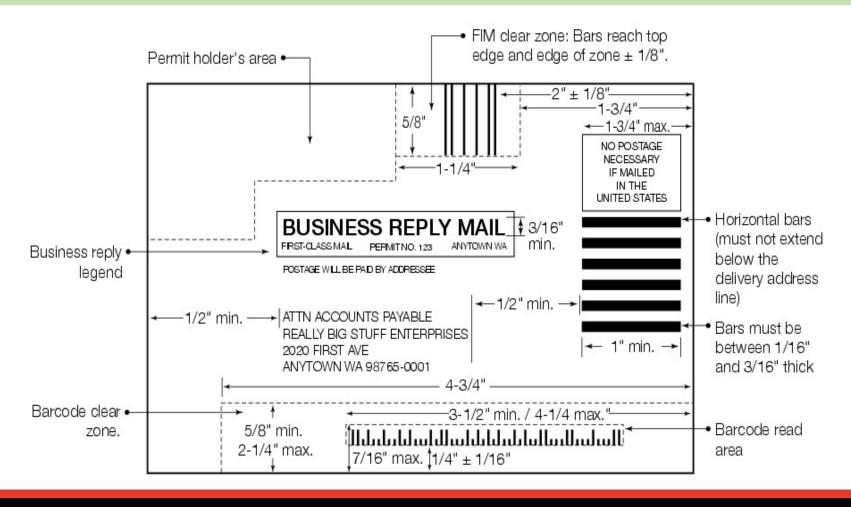
Knowledge article: **What are PC Postage & ePostage?**

- **What are PC Postage® & ePostage?**
- **Automated Package Verification Program**
- **What are the Shipping Options for Small Business Owners?**
- **How is Undeliverable and Misdelivered Mail Handled?**

What are the Shipping Options for Small Business Owners?

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Show Properties

Information

Title	What are the Shipping Options for Small Business Owners?
URL Name	What-are-the-Shipping-Options-for-Small-Business-Owners
Summary	There are several shipping options to deposit shipment with the United State Postal Service.
Article Number	000003120
What's New	**10/1/19**
	• Changed weight and thickness limits of stamped mail that can be picked up by a letter carrier.
Agent Tips	
Customer Information	

There are five shipping options available in addition to depositing shipments at a Post Office™ facility.

1. Leave it for your letter carrier when they deliver your mail. This may be limited to the thickness of the mailpiece, the weight of the mailpiece and the room your letter carrier has in their vehicle.
2. Deposit in a Collection Box. This may be limited depending on the weight or thickness of the mailpieces.

Knowledge articles: **Business Reply Mail** and **Reply Mail/Return Services**

UNITED STATES POSTAL SERVICE

Activity

Activity Instructions:

1. Use a "flipchart" using Notepad to write a summary of your assigned product or service.

2. Present the information on the flipchart and demonstrate on USPS.com for the class.

TOPICS:

- Address Management
- Zone Charts
- PO Box Online
- Customer Service & Reserve Box Service
- Premium Forward Service for Business
- Custom Marketing Mail

FLIPCHARTS:
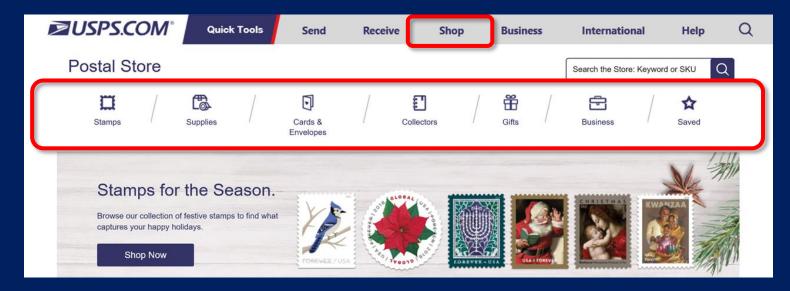
- Article titles
- PS Form #s
- Features/benefits
- Restrictions
- Payment Methods

USPS.COM DEMO

- Descriptive language
- Tab and header names
- Pauses for confirmation

UNITED STATES
POSTAL SERVICE

Demo

Activity

Activity Instructions:

1. Create an order for one box of 500 stamped #10 window envelopes.

2. **DO NOT SUBMIT** the order.

Post Office Boxes - POBOL

- As many Small Businesses operate out of their home, a PO Box provides a private, secure location for receiving and sending business mail.

- Customers can open PO Boxes in multiple locations and continue to grow their business.

- Mail typically arrives earlier to a PO Box than a street address.
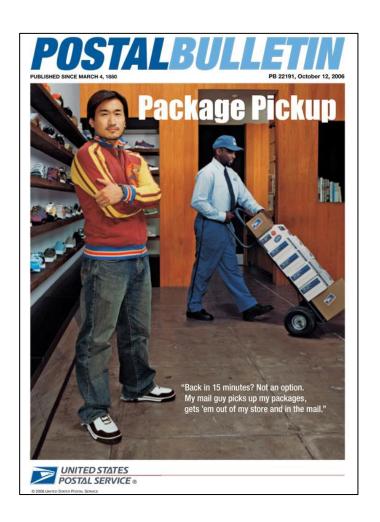
Business Mail Pickup/customer service:

- Customers regularly receive large volumes of mail

- A way to collect mail frequently throughout the day so the flow of business is not affected by once-a-day delivery

- Allows customers to obtain their mail from the Post Office's call window or loading dock anytime during business hours

- Customer needs to fill out an application and pay a service fee

Discounts and Price Incentives:

- Discounts available for customers who do additional preparation before sending their mail

- Destination discounts apply to mail prepared as prescribed by USPS and addressed for delivery within service area of destination

- Mailpieces meeting eligibility requirements and minimums per mailings

- Permit Required

Non-Profit

When customers ask, "How do I start mailing as a non-profit organization?"

- Must meet specific standards and receive special authorization from the USPS to mail at Non-profit Standard Mail™ prices

- Non-profit mail must meet eligibility requirements

- Fees and restrictions apply

Navigating to and Reviewing Forms and Publications

Commercial Mailing:

- Also referred to as Business, Bulk, Standard, or Presorted Mail

- Refers to quantities of mail prepared for mailing with reduced rates

- For customers who ship large volumes and are willing to do some of the preparation themselves

- Must apply for a Mailing Permit before taking advantage of this service

Activity Instructions
What is Commercial Mail? Is it Right for You?
Accessed from pe.usps.com > Publications drop down > Business Mail 101 > Getting Started > What is Commercial Mail?

USPS Marketing Mail Eligibility
Accessed from pe.usps.com > Business Solutions drop down > USPS Marketing Mail Eligibility Decision Tree

Address Management:

- For customers using commercial prices

- Corrects and standardizes addresses to ensure mail pieces are delivered on time to the appropriate recipients

- Can save your customers' postage costs by ensuring mail does not get returned

Postal Explorer/Business Solution

Activity

Activity Instructions:

Use the Raise Hand tool in Zoom to provide a response.

Customer asks, "We regularly receive large volumes of mail, mostly checks, and would like to get it earlier. Is it possible to get it twice a day?"

Business Mail Pickup/customer service

- A way to collect mail frequently throughout the day so the flow of business is not affected by once a day delivery
- Allows customers to obtain their mail from the Post Office's call window or loading dock anytime during business hours
- Customer need to fill out an application and pay a service fee.

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Activity

Activity Instructions:

Type recommended solutions for each scenario in Chat.

Scenario 1

Janice is calling for her manager. They are ordering all new stationary with matching envelopes. Her manager wants to know the best addressing format to be USPS compliant.

How can we help?

Refer to Quick Service Guide 201a > diagram 201.3.0. (Janice can now show her manager the template for the printer.)

Scenario 2

Chris is calling for his HOA, Home Owners Association, and they send out annual statements for dues. There are 280 members of the association. It's time consuming for volunteers.

Is there a faster way?

Use the Postal Store. (Suggest using the Postal Store to order personalized stamped envelopes with forever postage. This will save time for the volunteers who won't have to address or apply postage to each envelope. Due to the low volume of letters, it would not be suggested to apply for and pay permit fees.)

Activity

Activity Instructions:

Use the annotation tool to provide answers to each question.

1. True or False? USPS offers after-the-fact billing for Small Business shipping services.

2. What service may be appropriate for a customer who does not want to get a permit?

3. What service allows customers to retrieve their own mail from the post office or loading dock during business hours?

4. True or False? Commercial mailing requires mailing permits.

☑ True

☒ False

- Module 1: Introduction to SBA
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    - Lesson 5: Documentation and Escalation
    - Lesson 6: Capture the Why
- Module 3: USPS.com and Customer Registration
- Module 4: EDDM
- Course Assessment and Nesting

Learning Objectives

At the end of this lesson, you will be able to:
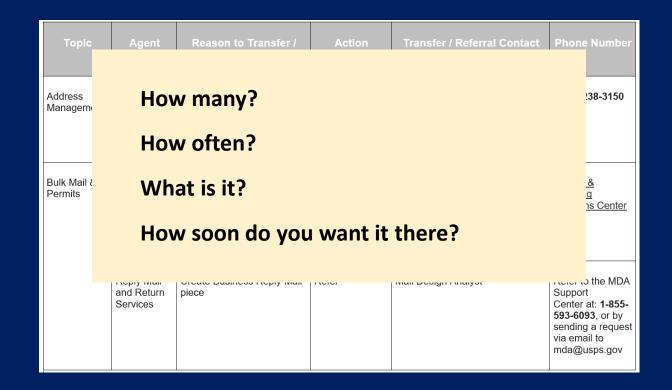
- Identify call transfer points
- Identify Submit a Lead requirements

Lesson 4: Transfers and Referrals

Knowledge article: **SBA: Handling Small Business Associate Training Transfers & Referrals - Advisor Guidelines**

The Transfers & Referrals Guidelines table is designed to be used **after** you have asked **probing questions** to determine the **customer's need** and educated the customer on products, tools, PS Forms, and mailing requirements.

Topic	Agent	Reason to Transfer /	Action	Transfer / Referral Contact	Phone Number
Address Management					238-3150
Bulk Mail & Permits					& s Center
	Reply Mail and Return Services	Create Business Reply Mail piece	Refer	Mail Design Analyst	Refer to the MDA Support Center at: **1-855-593-6093**, or by sending a request via email to mda@usps.gov

How many?

How often?

What is it?

How soon do you want it there?

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Activity

Activity Instructions:

1. Use the Raise Hand tool in Zoom to provide an answer.

2. When the Trainer calls on you, use the annotation tool to type an answer.

I'd like information on ways to improve my address list quality and standardization.
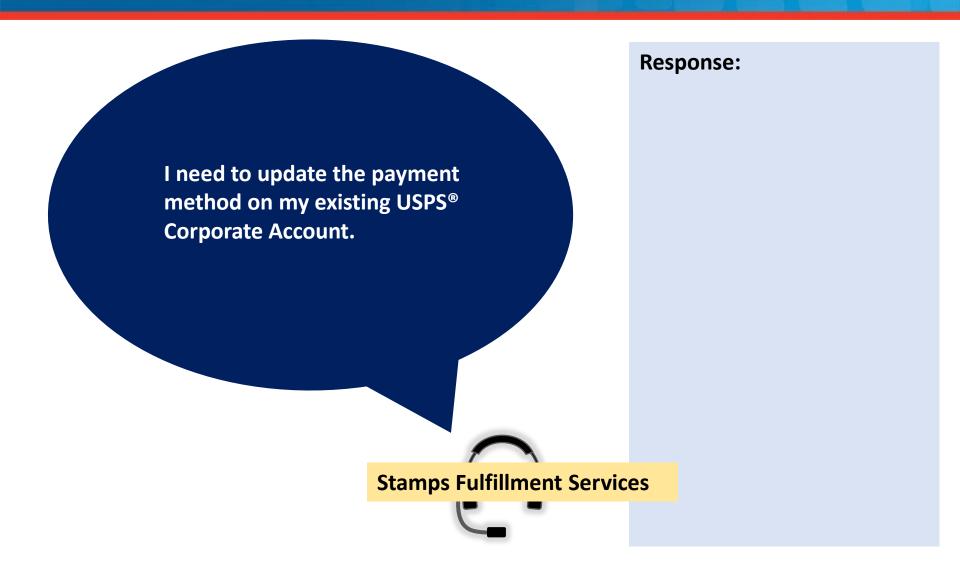
National Customer Support Center (NCSC)
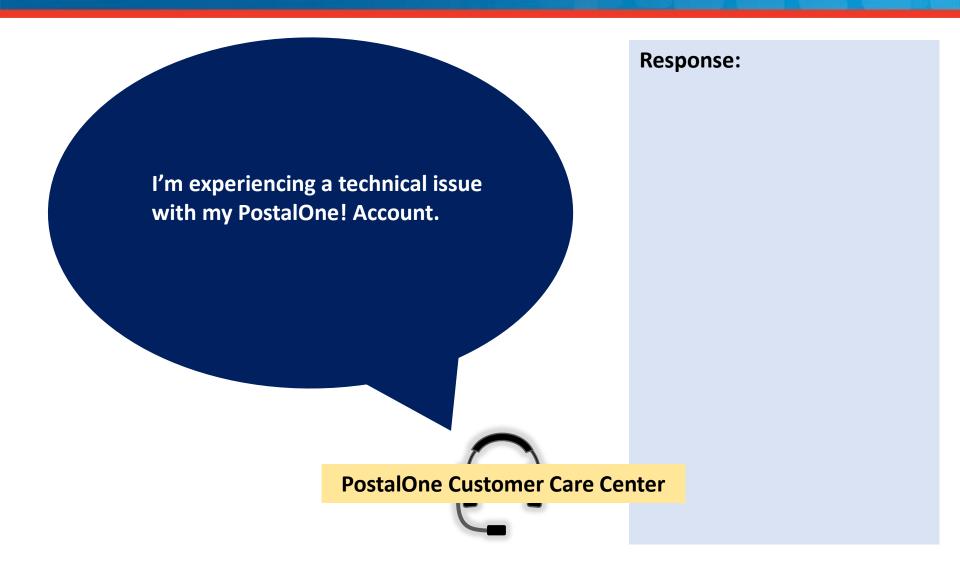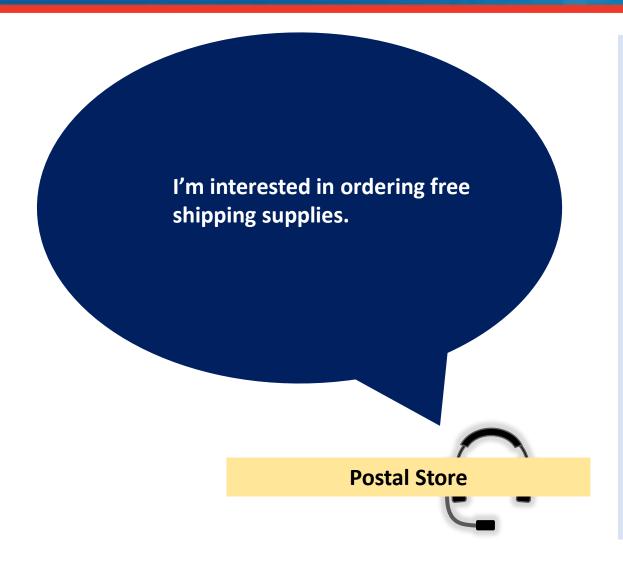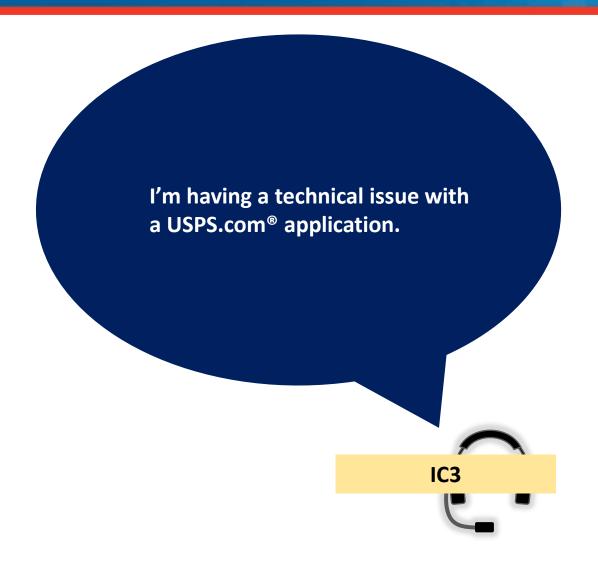
Response:

UNITED STATES
POSTAL SERVICE

Response:

I need to update the payment method on my existing USPS® Corporate Account.

Stamps Fulfillment Services

UNITED STATES POSTAL SERVICE

I'm experiencing a technical issue with my PostalOne! Account.

PostalOne Customer Care Center

Response:

UNITED STATES POSTAL SERVICE

I'm interested in ordering free shipping supplies.

Postal Store

Response:

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POSTAL SERVICE

I'm having a technical issue with a USPS.com® application.

IC3

Response:

UNITED STATES
POSTAL SERVICE

I want to know where I can order stamps and shipping supplies.

Postal Store

Response:

UNITED STATES
POSTAL SERVICE
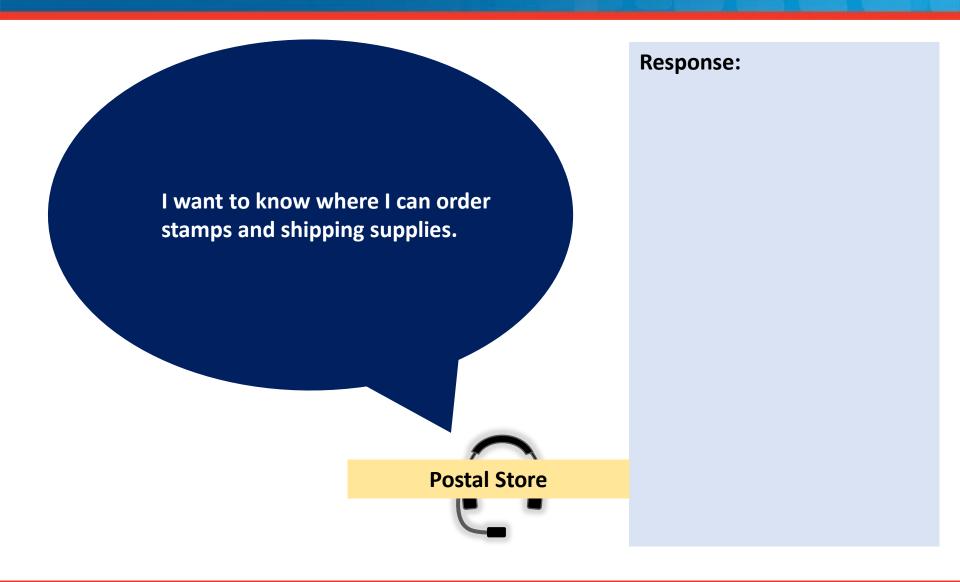
Knowledge article: **Price Incentives and Business Mail Pricing Mail Factors**

- Used when new customers ask for support that requires one of our trained representatives to schedule an in-person visit

- In order for discounts to apply, customer will have to meet criteria based on:
    - Level of workshare
    - Volume
    - Approved Payment Methods
    - Mail Entry

Who would we refer?   **New business**

- Submit a Lead eLearning

- Knowledge article, **Initiating a Submit a Lead Request**

- Submit a Lead tool

Knowledge article: **Initiating a Submit a Lead Request**

Activity

Activity Instructions:

Provide your answers in Chat.

Can you name some words or phrases that may indicate that the call is a likely Submit a Lead referral?

- Logistics

- Fulfillment

- E-commerce

UNITED STATES POSTAL SERVICE

Listening for key terminology

Can the USPS offer the same services as UPS or FedEx?

→ Customers referencing UPS and FedEx are already contracted shippers with our competitors. **This is a Submit a Lead.**

We have a contract to ship products for our customer off their website. How do we start shipping with the Post Office?

→ The language "contract to ship" means that they are a fulfillment center for eCommerce. **This is a Submit a Lead.**

Maria's manager asked her to call the Post Office to find out how we can help them set up an account for mailing documents. They are a car dealership and they transfer titles to new owners.

→ Car dealerships are big for USPS Corporate Accounts. This can go both ways. Single dealership can be referred directly to Form for USPS Corporate Account. Dealerships with multiple locations may require more complex solutions. **This is a Submit a Lead.**

Discounts and Price Incentives:

- Commercial Base Pricing for Click-N-Ship Business Pro, PC Postage, or Permit Imprint

- Commercial Plus Pricing for customers with high-volume Priority Mail Express and Priority Mail mailings

- Discounts available for customers who do additional preparation before sending their mail

Activity

Activity Instructions:

Use the Raise Hand tool in Zoom to provide an answer.

Discounts and Price Incentives

Customer asks, "How do I qualify for lower prices?"

- Ask Probing questions.
- Determine the volume.
- Educate the customer. Discounts and incentives are volume driven.
- Discounts apply for customers who do additional preparation before sending their mail.

Activity

Activity Instructions:

Use the Raise Hand tool in Zoom to provide questions that may be appropriate to determine if these calls require Submit a Lead.

1. A customer needs to ship gift boxes valued at $75 to customers who recently won a sweepstakes. The winners are expecting to receive the gifts this Sunday. It is important that the package arrives on time and is delivered to the addressee only.

   What probing questions would you ask to determine if Submit a Lead is appropriate?

2. A customer needs to ship 30 CDs. The CDs are a gift to customers, so the customer does not want to spend a lot of money. As long as the CDs arrive within the month, the exact delivery date is not important.

   What probing questions would you ask to determine if Submit a Lead is appropriate?

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Activity

Activity Instructions:

Use the annotation to type answers to each question.

1. What tool can assist you in helping your customer once you've asked probing questions and determined their need?

   Transfers & Referrals Guidelines

2. What are two requirements for price incentives/Submit a Lead recommendations?
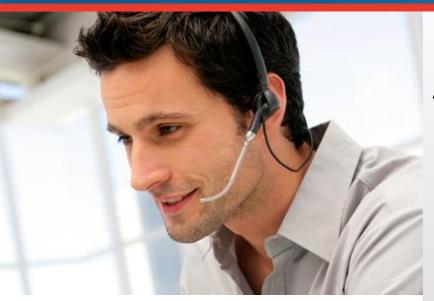
   Customer commitment to workshare; high volume mailing; approved payment methods; mail entry

- Module 1: Introduction to SBA
- Module 2: SBA Advanced Customer Service
    - Lesson 1: Product Value Proposition
    - Lesson 2: Quick Service Guides
    - Lesson 3: Business Services
    - Lesson 4: Transfers and Referrals
    - Lesson 5: Documentation and Escalation
    - Lesson 6: Capture the Why
- Module 3: USPS.com and Customer Registration
- Module 4: EDDM
- Course Assessment and Nesting

Learning Objectives

At the end of this lesson, you will be able to:

- Identify when creating a Service Request is required

- List steps for submitting a Service Request

Lesson 5: Documentation and Service Requests

Knowledge article: **Submitting an SBA Question - Advisor Guidelines**

Service Request - Advisor Guideline
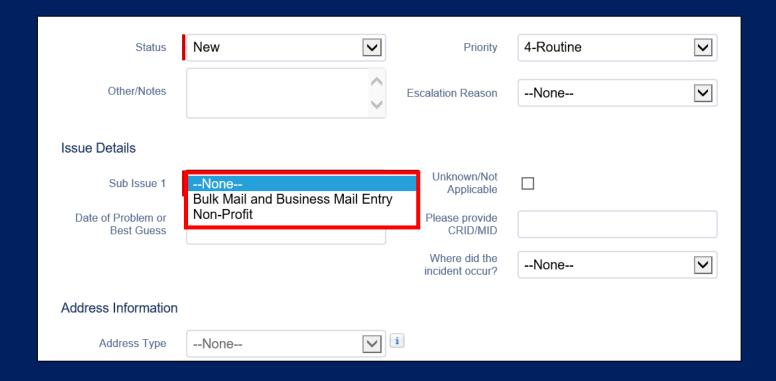
- Advise customer that further research is needed and create a Service Request.

- Type all factual, pertinent information.

- Inform your customer that, for Service Requests and some issues, they should expect to be contacted with an answer or a status update to their question within *two* business days.

- Provide the Service Request number.

Activity

Activity Instructions:

Type the answers in Chat.

What are three options for call solutions?

- Resolve the inquiry on the initial call: No follow-up or additional action is required.

- Transfer or refer the customer: You identify a more suitable contact to answer your customer's question and transfer or refer the customer.

- Create a Service Request: You may use C360 to create a Business Inquiry Service Request.

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Activity

Activity Instructions:

Use the annotation tool to mark the answer to each question as it displays.

True or False? If you do not understand a customer's inquiry, you should immediately transfer or refer them to another department.

True	False

Which of the following are possible Service Requests you can expect to create as a Small Business visitor?

Bulk Mail	EDDM	Non-profit

- Module 1: Introduction to SBA
- Module 2: SBA Advanced Customer Service
    - Lesson 1: Product Value Proposition
    - Lesson 2: Quick Service Guides
    - Lesson 3: Business Services
    - Lesson 4: Transfers and Referrals
    - Lesson 5: Documentation and Escalation
    - Lesson 6: Capture the Why
- Module 3: USPS.com and Customer Registration
- Module 4: EDDM
- Course Assessment and Nesting

Learning Objectives

At the end of this lesson, you will be able to:

- Determine the most appropriate disposition

Lesson 6: Capture the Why

UNITED STATES POSTAL SERVICE

Activity

Activity Instructions: Complete the Capture the Why worksheet in the Participant Guide.

1.	I have my Permit Application completed and need to know where to bring it.	**6. Business, 1. Business Mail Entry**
2.	We are a payroll company and need to Express Mail paychecks every Thursday for Friday delivery.	**6. Business, 1. Business Mail Entry**
3.	I send out shipments and order boxes online. Can I order a larger quantity?	**5. Postal Facility, 2. Forms/Supplies**
4.	We are a Credit and Collections company and do not want our street address on our statements. How can we conceal our location and still get out mail?	**5. Postal Facility, 7. PO Boxes**
5.	I printed out shipping labels using my Stamps.com account and would like to get a refund.	**7. Other, 1. Other: not postal**
6.	My Permit hasn't been used in 3 years, is it still active?	**6. Business, 1. Business Mail Entry**
7.	PB charges us $700.00 a month. Can the Post Office do anything about reducing this cost?	**6. Business, 1. Business Mail Entry**

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Activity

Activity Instructions: Use the annotation tool to mark your answers.

True or False? Common Small Business calls, such as those regarding EDDM or the BMEU fall under the "Business" topic when Capturing the Why.

True	False

True or False? When in doubt, use the "Other" topic when Capturing the Why.

True	False

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Activity

Activity Instructions: Use the annotation tool to mark your answers.

Which of the following offerings may result in more effective product value matching?

☑ Offering the customer higher value products or services that may address additional needs

☒ Directing customers to the product/service they requested though it may not address their actual need

☒ Directing customers to investigate products and services through the Quick Service Guides

☑ Offering the customer products or services related to their specific request

Activity

Activity Instructions:
Use the annotation tool to mark your answers.

Where would you find the Quick Service Guides?

☒ C360

☑ Postal Explorer

☒ Business Services

☒ Publications

Activity

One USPS business service is Post Office Boxes Online (POBOL). How long do customers have to return their completed PS Form 1093 to the Post Office location?

Activity Instructions: Use the annotation tool to mark your answers.

☒ 7 days

☒ 14 days

☑ 30 days

☒ 90 days

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Activity

Activity Instructions:
Use the annotation tool to mark your answers.

If a customer has technical issue with the EDDM application on USPS.com, where would you transfer him or her?

☒ National Customer Support Center

☒ Consumer Affairs

☒ Business Services

☑ ICCC Support Group (IC3)

UNITED STATES POSTAL SERVICE

Activity

Activity Instructions:
Use the annotation tool to mark your answers.

If you cannot resolve a customer's question using the SBA content or instructions in C360 Knowledge, you should create a Service Request.

☑ True

☒ False

Activity

Activity Instructions:
Use the annotation tool to mark your answers.

A customer regularly receives large volumes of mail and would like to know if it's possible to get deliveries twice a day. How do you Capture the Why?

☒   6. Business, 4. Other

☒   5. Postal Facility, 2.Forms/Supplies

☒   2. Mail Services, 9. Other

☑   2. Mail Services, 2. Daily Mail Delivery

Congratulations!

You have completed Module 2.
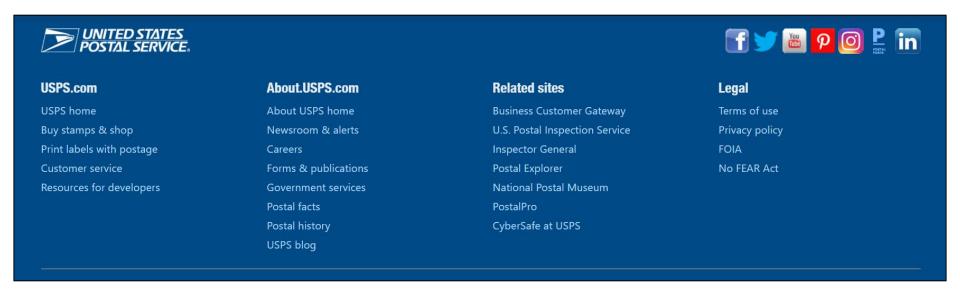
Small Business Associate Training

USPS.com Registration and Tools

Small Business Associate Training

Module 3: USPS.com Registration and Tools

Module Duration: 5.5 hours

- Module 1: Introduction to Small Business Associate
- Module 2: Small Business Associate Advanced Customer Service
- Module 3: USPS.com and Customer Registration
  - Lesson 1: Customer Accounts
  - Lesson 2: Online Services
  - Lesson 3: Web Tools
  - Lesson 4: Business Customer Gateway
  - Lesson 5: Return Services
- Module 4: EDDM
- Course Assessment and Nesting

	Best Practice
	• Do not rush ahead of the customer. • Check in with the customer. • Use active listening and ask further probing questions.

Lesson 1: Customer Accounts

Learning Objectives

At the end of this lesson, you will be able to:

- Create an account on USPS.com
- Reset customer passwords
- Identify customer profile options

Registered Account holders can:

- Print Shipping Labels
- Schedule Package Pickup
- Manage PO Box
- Hold Mail and Premium Mail Forwarding
- Print Customs Forms
- File Domestic Claims
- Store and use credit cards in their USPS.com account
- Use their USPS.com login information to access the Every Door Direct Mail (EDDM) Online Tool

UNITED STATES POSTAL SERVICE

Activity

Create Your USPS.com Account

Step 1: Choose your language and username

Please choose a default language for your USPS account. This can be changed at a later time from your preferences page.

Please enter a username which will uniquely identify you with the United States Postal Service.

* indicates a required field

* Choose a language preference

[English ▾]

* Username ❓

[   ]

Step 2: Enter your security information

Please create a password for your account. We highly recommend you create a unique password - one that you don't use for other websites.

* indicates a required field

Pick a Password

* Password

[   ]

* Re-Type Password

[   ]

Passwords must be at least 8 characters in length and include at least one uppercase letter, one lowercase letter, and one number. They are case-sensitive and cannot include your username or more than two consecutive identical characters. ❓

Please answer two secret questions. Answers are not case-sensitive. If you forget your password, you will be asked for this information to re-gain access to our site.

* indicates a required field

Pick Two Security Questions

* First Security Question

[Select First Question ▾]

* Second Security Question

[Select Second Question ▾]

* Your Answer

[   ]

* Your Answer

[   ]

UNITED STATES POSTAL SERVICE

Activity

Step 3: Choose your account type

Choose **personal** account if you are interested in services for your home? i.e. order stamps, renew a MailBox, mail a package, etc.

Interested in solutions for your business - home-based, small, medium, or large? Choose **business** account.

Please choose which type of account you would like to create

○ Personal Account   ◉ Business Account

UNITED STATES
POSTAL SERVICE

Knowledge article: **USPS.com® website support - Account issues**

Activity User Name?

Create a new account

Activity Instructions:

Use the Raise Hand tool in Zoom to provide an answer to the question **and** the location of the answer.

What special characters are allowed for creating a password?

What are the customers options for locked accounts?

What happens when the credit card expires?

If the customer has Informed Delivery and they change their email address, what should they do in their profile?

Activity

Activity Instructions:

Use the Raise Hand tool in Zoom to provide an answer.

1. **Identify three benefits of having a USPS.com account.**

   Print Shipping Labels, schedule package pickup, manage PO Boxes, hold mail and premium mail forwarding, print customs forms, file domestic claims, store and use credit cards in their USPS.com account

2. **What option can you offer customers who remember the answers to their security questions, but have been locked out of their account?**

   Transfer to IC3. (Remember, customers must still answer security questions.)

3. **True or False? Customers can manage their stamps subscription from the account options**

   True

4. **Which "Your Account" selection allows customers seamless online business services management?**

   USPS Applications

- Module 1: Introduction to Small Business Associate
- Module 2: Small Business Associate Advanced Customer Service
- Module 3: USPS.com and Customer Registration
  - Lesson 1: Customer Accounts
  - Lesson 2: Online Services
  - Lesson 3: Web Tools
  - Lesson 4: Business Customer Gateway
  - Lesson 5: Return Services
- Module 4: EDDM
- Course Assessment and Nesting

Lesson 2: Online Services

Learning Objectives

At the end of this lesson, you will be able to:

- Explain the options in the Business tab of USPS.com to customers

- Identify the characteristics of Click-N-Ship (CNS)

- Differentiate between CNS and CNS Business Pro

- Describe the characteristics of Informed Delivery marketing to customers

- Explain business mailing prices to customers

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POSTAL SERVICE

Take Note

Navigating USPS.com

- Click-N-Ship
- Click-N-Ship Business Pro
- Printer Affiliates Program
- Business Customer Gateway (BCG)
- Returns

Knowledge article: **Click-N-Ship – The Basics**

- Who should use Click-N-Ship

- Locked Customer Accounts

- Payment Options

- Email Communications

- Extra Services

- Insurance

- Deleting your Click-N-Ship Account

- Faxing or Emailing Shipping Labels

- Hidden Postage

- Resolve Payment Questions

Activity

Activity Instructions:

Complete the Click-N-Ship Worksheet in the Participant Guide

1. Credit/debit, PayPal

2. Priority Mail Express, Priority Mail, USPS Retail Ground, Global Express Guaranteed, PME International, PM International, First class package international service

3. No

4. USPS cannot hide postage. If customer wants to do this, they need to use a postage provider.

5. Nothing, but should check if they were charged twice. If double charged, need to transfer the customer to IC3.

6. Transfer to IC3.

7. Transfer to IC3.
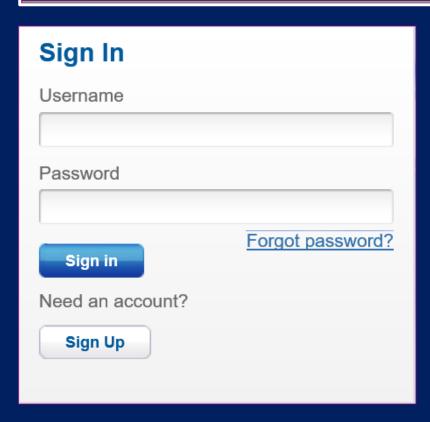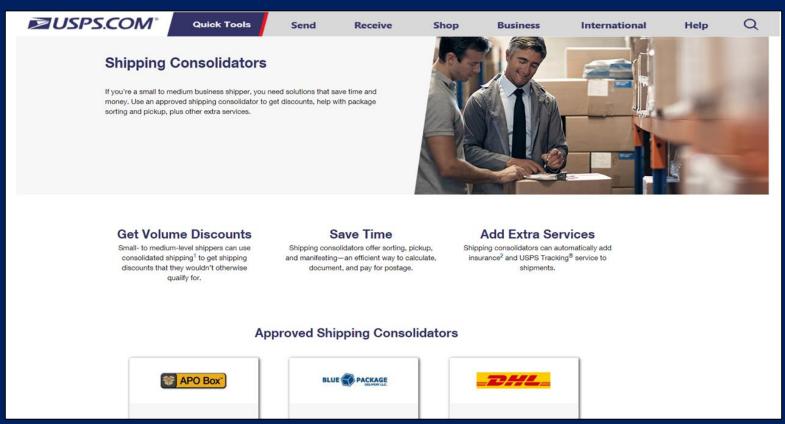
Find a Vendor

Informed Delivery Marketing

What is Informed Delivery?

Informed Delivery is a **consumer-facing feature** that **enhances hardcopy mail** delivery by providing consumers daily mail images via email and online dashboard

Subscribers receive a morning **email that includes scanned images of the exterior** of incoming letter-sized mailpieces (processed through automated equipment)

If a Mailer participates in an Informed Delivery operational test, **supplemental content, referred to as "interactive campaigns"** will be shown (for Letters or Flats)

Informed Delivery **integrates hardcopy mail** and **digital marketing,** providing **multiple impressions** and **interactivity** for subscribers in current eligible ZIP Code™ locations

2 ★ USPS® ★ INFORMED DELIVERY ★ MAILER PILOT – PROGRAM OVERVIEW

Informed Delivery Interactive Experience

Calculate a Business Price

Demo

Take Your Business Global

You Know Your Business. We Know Shipping.

Let us help you find the most affordable and efficient ways to send and receive international shipments. Shipping internationally with USPS®, you get:

- Cost-effective Bulk and Package Services
- Free Shipping Software
- Volume Savings

International Sales Executive

Find the International Sales Executive in your region to discuss your specific product and pricing solution needs.

Download the list of International Sales Executive RTF

Managing Business Mail

Manage Your Business Mail

Use PO Boxes, Mail Pickup, and Forwarding Services

Whatever your business mail needs, USPS® has a service that fits. Our cost-effective and convenient services make it easy to manage any business mail volume so you can focus on growing your business.

Activity

Activity Instructions:

1. Use the Raise Hand tool in Zoom to provide an answer.

2. When the Trainer visits on you, use the annotation tool to type an answer.

What assistance can you provide customers visiting with questions or issues relating to their shipping consolidators or online direct mail experts?

Response:

You must direct them to contact the third party directly

- Module 1: Introduction to Small Business Associate
- Module 2: Small Business Associate Advanced Customer Service
- Module 3: USPS.com and Customer Registration
    - Lesson 1: Customer Accounts
    - Lesson 2: Online Services
    - Lesson 3: Web Tools
    - Lesson 4: Business Customer Gateway
    - Lesson 5: Return Services
- Module 4: EDDM
- Course Assessment and Nesting

Lesson 3: Web Tools

Learning Objectives

At the end of this lesson, you will be able to:

- Describe the purpose of the Web Tools API library
- Describe the Web Tools registration process to customers
- Locate customer Web Tools login credentials

Take Note

Activity Instructions:
In the Participant Guide, complete the Web Tools Worksheet.
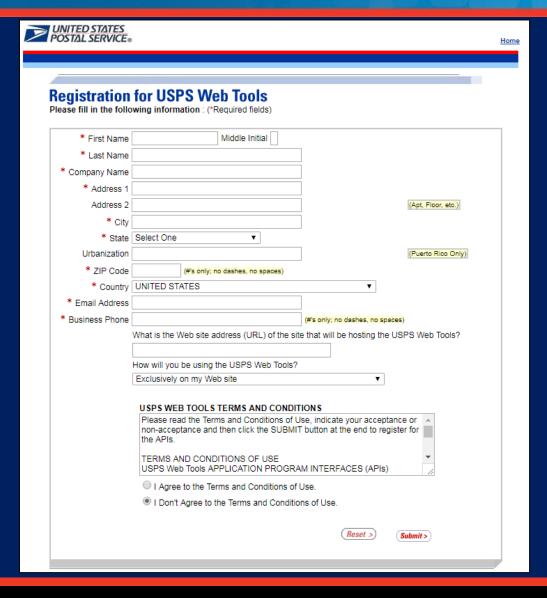
Web Tools

- API: Application Programming Interface
- XML Codes: Transfer of information
- Register to access tools –no charge
- PASSWORD and USERNAME is assigned and in the EMAIL sent to the person that registered
- Set up payment
- Includes Address Standardization
- Issues with permissions, tool not performing properly (Transfer to IC3)

Confirmation Email

Username

Password

registration@shippingapis.com | Add to Contacts
Today, Tuesday, Jan 10 09:21 AM | Show Details | View source
Important USPS Web Tools Registration Notice
***** Please DO NOT REPLY to this automated message. Contact
information is provided below. *****

Thank you for registering for the U. S. Postal Service's Web Tools
Application Programming Interfaces (APIs). You have successfully
registered for the Web Tools User ID (Username) found below. If you
are using third party software, refer to your software provider for
further instructions to begin using Web Tools with your application.
Keep this email for your records and proceed to the next steps to
complete integration.

Your Username is 708CUSTO2XXX
Your Password is 432RZ57JP9XX

Your User ID is currently authorized to access the following groups of
APIs in production:
- Price Calculators
- Package Tracking
- Service Standards and Commitments
- Address Information (see below for usage restrictions)

For additional API access not listed above, see instructions in step 2
below.

Next Steps:

1. **Begin using USPS Web Tools**
   Shippers using a third party shipping software or shopping cart provider: Refer to your software provider for instructions to begin using USPS Web Tools. If your software prompts you for URLs to access the USPS APIs, please use the production URLs below.

   Developers integrating Web Tools into a custom application:
   The following are the production URLs you will use to access the Web Tools Servers:
   http://production.shippingapis.com/ShippingAPI.dll
   https://secure.shippingapis.com/ShippingAPI.dll

Next Steps: (continued)

Step-by-Step Instructions for All USPS Web Tools (important information when getting started):
https://www.usps.com/business/web-tools-apis/general-api-developer-guide.pdf

API User's Guides (API specific technical/integration information):
https://www.usps.com/business/web-tools-apis/technical-documentation.htm

USPS Web Tools website: (contains all these resources and more):
https://www.usps.com/business/web-tools-apis/welcome.htm

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Take Note

Activity Instructions: In Participant Guide, complete the Web Tools Worksheet.

Web Tools

- API: Application Programming Interface
- XML Codes: Transfer of information
- Register to access tools –no charge
- PASSWORD and USERNAME is assigned and in the EMAIL sent to the person that registered
- Set up payment
- Includes Address Standardization
- Issues with permissions, tool not performing properly (Transfer to IC3)
- Registered USPS.com users must register for API permissions
- Customers and Developers get Usernames and Passwords from the registration email
- API's with registration: Address Information APIs: Address Validation, City/State Lookup, and Zip Code Lookup

API

ip Code

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1. **True or False? If a customer has registered on USPS.com, then they have already registered for Web Tools.**

   False. There is a separate registration for WebTools.

2. **True or False? Customers use their USPS.com login information to access the WebTools.**

   False. Customers must use the login credentials provided in the registration confirmation email.

3. **What additional API permissions can be granted and how?**

   Permission for creating shipping labels and scheduling Package Pickups. To obtain these permissions customers must contact the Internet Customer Care Center and include "Web Tools API Access" in the subject line.

- Module 1: Introduction to Small Business Associate
- Module 2: Small Business Associate Advanced Customer Service
- Module 3: USPS.com and Customer Registration
    - Lesson 1: Customer Accounts
    - Lesson 2: Online Services
    - Lesson 3: Web Tools
    - Lesson 4: Business Customer Gateway
    - Lesson 5: Return Services
- Module 4: EDDM
- Course Assessment and Nesting

Lesson 4: Business Customer Gateway

Learning Objectives

At the end of this lesson, you will be able to:

- Locate the services available through the Business Customer Gateway

- Assist customers with the BCG registration process

- Identify the location of a customer CRID

- Locate the BCG Navigation Guide

Take Note

Business Customer Gateway (BCG)

- Small Business Associate do not create accounts
- CRID – Customer Registration ID
  - Automatically assigned when you register
- MID – Mailer ID
  - Apply in BCG
- Imb Tracing – Intelligence Mail Barcodes for automated discounts of additional .20c pp
- EPS – Electronic Payment System (CAPS)
- CNS Business Pro
- Return Services
- EDDM – BMEU prices
- Premium Forwarding Service (PFS) – Commercial
- Package Intercept
- Transfer to PostalOne and NCSC

USPS Healthc

From Pharmaceuti
providing customiz
communication sol

USP

Mailers

Save time and money **managing your mailings online**. Get your message where you need it to go with **Every Door**
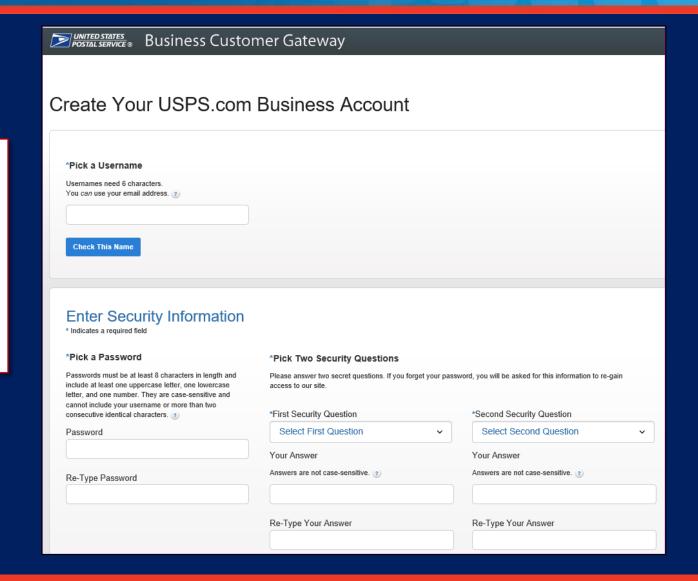
Use the **Electronic Verification System** to save paperwork by paying postage with electronic manifests.

Sign up for **USPS Promotions and Incentives**, save money with **Automation Discounts** and unlock the

UNITED STATES POSTAL SERVICE

Person registering for BCG account will enter their contact information here.

To verify a valid delivery address they will choose one of the three boxes to continue.

Activity

Activity Instructions:

Use the Raise Hand tool in Zoom to provide an answer.

Next, we need your name and contact info
* Indicates a required field

Enter Your Name

Title
Select

*First Name

M.I.

*Last Name

Suffix
Select

Enter Your Email Address

*Enter Your Email Address

*Re-Type Your Email Address

Enter Your Phone

*Type   *Phone   Ext.
US

Mobile (U.S. Only)

Can we contact you?
Get communications from USPS and our partners.

☑ FROM USPS

☑ FROM USPS PARTNERS

Find my address by...

Please enter your address so USPS can find the best deliverable option for you.

Address | ZIP Code™ | Company Identifier

What visit type would you refer a customer to the BCG?

Customers asking for account balances on their permit(s), customers shipping from USPS.com seeking better prices or more ease of use for Package Intercept, customers seeking one-stop shopping for managing permit(s), POBOX, shipping, pickups and creating forms for induction at their BME.

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Next, the new customer will automatically be taken to this page.

Customer must verify their business information is correct, and click the **Continue** button.

Welcome to the Business Customer Gateway

* Indicates a required field

You've successfully registered your account, and you are almost ready to use the Business Customer Gateway. We've got you signed up as:

Your Business Location:

TEST COMPANY
1047 N STAFFORD STREET
ARLINGTON, VA 22201
UNITED STATES

CRID ⑦ : 12445581

You will be given permission to use several USPS Business Services allowing you to do things like:
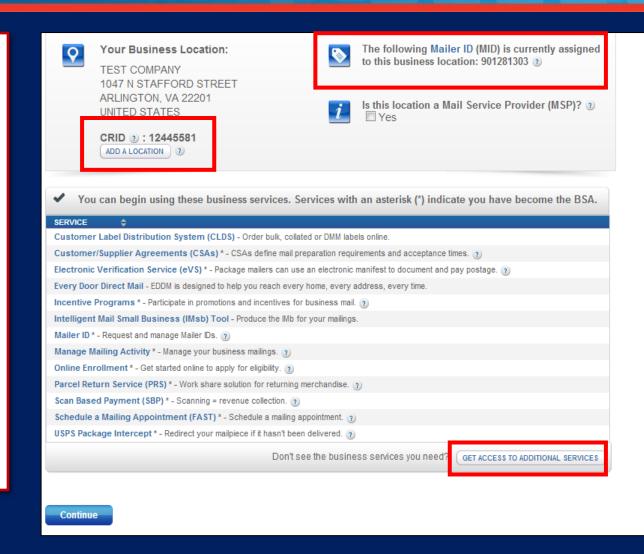
- Prepare, track and monitor your mailings
- Manage Mailer IDs and Permits
- Simplify Full Service Mailing and Customer Returns
- Target Areas with Direct Mail
- Send and Manage Large Shipments
- Order Mailing and Shipping Labels
- Enroll for Shipping Services
- Generate Mail and Transaction History reports
- Stay On Top of USPS Promotions and Incentive Programs

The next page displays information about customer's company, and the services that are now linked to the business.

Customers are able to request access to additional services by selecting the **Get Access to Additional Services** button.

Your Business Location:

TEST COMPANY
1047 N STAFFORD STREET
ARLINGTON, VA 22201
UNITED STATES

CRID ? : 12445581
ADD A LOCATION ?

The following Mailer ID (MID) is currently assigned to this business location: 901281303 ?

Is this location a Mail Service Provider (MSP)? ?
☐ Yes

✔ You can begin using these business services. Services with an asterisk (*) indicate you have become the BSA.

SERVICE
Customer Label Distribution System (CLDS) - Order bulk, collated or DMM labels online.
Customer/Supplier Agreements (CSAs) * - CSAs define mail preparation requirements and acceptance times. ?
Electronic Verification Service (eVS) * - Package mailers can use an electronic manifest to document and pay postage. ?
Every Door Direct Mail - EDDM is designed to help you reach every home, every address, every time.
Incentive Programs * - Participate in promotions and incentives for business mail. ?
Intelligent Mail Small Business (IMsb) Tool - Produce the IMb for your mailings.
Mailer ID * - Request and manage Mailer IDs. ?
Manage Mailing Activity * - Manage your business mailings. ?
Online Enrollment * - Get started online to apply for eligibility. ?
Parcel Return Service (PRS) * - Work share solution for returning merchandise. ?
Scan Based Payment (SBP) * - Scanning = revenue collection. ?
Schedule a Mailing Appointment (FAST) * - Schedule a mailing appointment. ?
USPS Package Intercept * - Redirect your mailpiece if it hasn't been delivered. ?

Don't see the business services you need? GET ACCESS TO ADDITIONAL SERVICES

Continue

Note: Every Door Direct Mail (EDDM) customers can also register through the Business Customer Gateway (BCG).

If they are using a mailing permit, this will link their permit to the EDDM tool.

UNITED STATES POSTAL SERVICE

Need help?

You've got questions, we've got answers. Below you can find the information to support your mailing and shipping needs.

BCG Navigation Guide

Need to manage BSA assignments?

Online Support

Live Support

BCG Service Information

1. **Customer says, " I am in my BCG account and cannot submit my electronic postage statement."**

   Transfer to PostalOne.

2. **Customer asks, " How do I get a mailer ID?"**

   Register for BCG and request the MID.

3. **Where can you navigate customers for BCG self-service?**

   BCG Navigation Guide on the BCG Help page

- Module 1: Introduction to Small Business Associate
- Module 2: Small Business Associate Advanced Customer Service
- Module 3: USPS.com and Customer Registration
    - Lesson 1: Customer Accounts
    - Lesson 2: Online Services
    - Lesson 3: Web Tools
    - Lesson 4: Business Customer Gateway
    - Lesson 5: Return Services
- Module 4: EDDM
- Course Assessment and Nesting

Lesson 5: Return Services

Learning Objectives

At the end of this lesson, you will be able to:

- Assist customers with return options available through USPS.com

- Assist customers with return services available through USPS.com

Take Note

Parce
Ship

Return Services

- Returns can be complicated – submit a lead
- Merchandise Return label article
- Create and manage accounts on BCG
- Permits required

Return Services

Returns Are Inevitable -

Make it easy for customers to return a packag
your customers quick, convenient, and flexibl

Ways to Provide Return Labels

- Include one in the original shipment box
- Use the cloud platform
- Integrate the returns tool on your website
- Let customers print their own
- Request one through Print and

Contact USPS Returns Sp

Parcel Return Service

Merchandise Return Label

Merchandise Return Label with USPS Tracking

UNITED STATES POSTAL SERVICE

Demo
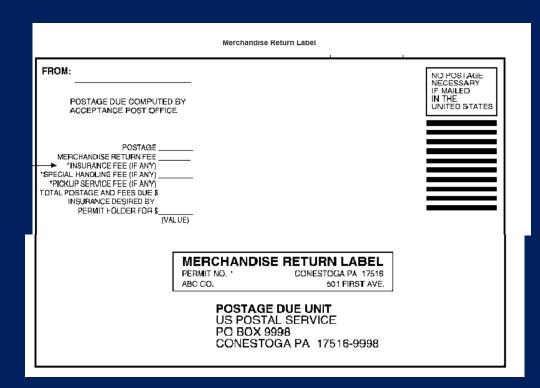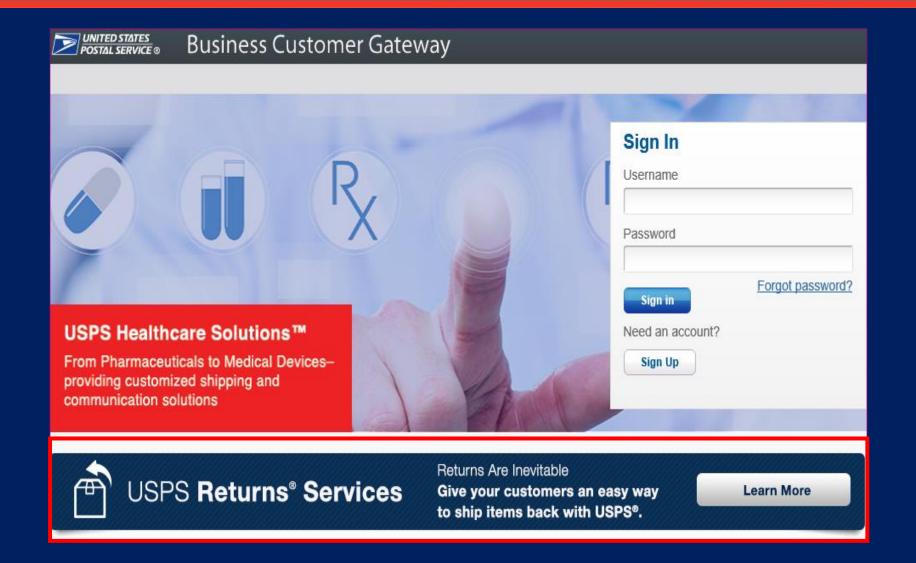
Forms and Publications

USPS.COM

HELPFUL LINKS	ON ABOUT.USPS.COM	OTHER USPS SITES	LEGAL INFORMATION
Contact Us	About USPS Home	Business Customer Gateway	Privacy Policy
Site Index	Newsroom	Postal Inspectors	Terms of Use
FAQs	USPS Service Updates	Inspector General	FOIA
	Forms & Publications	Postal Explorer	No FEAR Act EEO Data
USPS JOBS	Government Services	National Postal Museum	
Careers		Resources for Developers	
		PostalPro	
		CyberSafe at USPS	
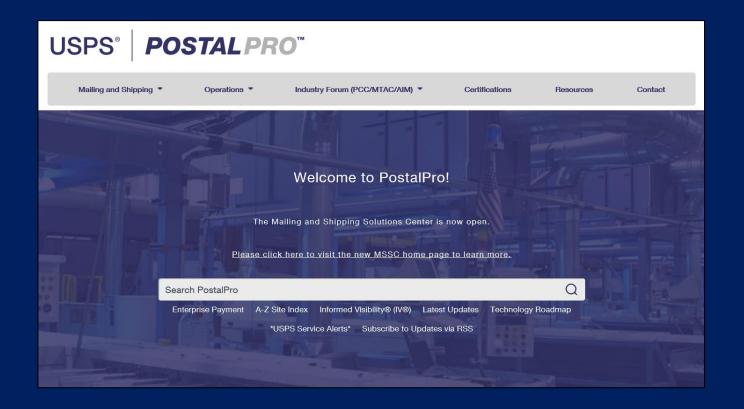
- PS Form **3615** Mailing Permit Application and Customer Profile

- PS Form **3615-A** Application for Picture Permit Imprint

- PS Form **3623** Request for Confirmation of Authorization (or Pending Application) to Mail at Nonprofit USPS Marketing Mail Prices

- PS Form **3624** Application to Mail at Nonprofit USPS Marketing Mail Prices

What's in PostalPro?

- Mailing and Shipping
- Operations
- Industry Forum

- Certifications
- Resources
- Contact

Activity

Activity Instructions:
Use the annotation tool to mark your answers.

Who addresses PostalPro visits?

☐   Postal Inspector

☑   National Call Center

☐   IC3

UNITED STATES
POSTAL SERVICE

Activity

1. **What classes of mail can be used for returns?**

   PM, FCP, Parcel Select

2. **True or False? Return services require a permit.**

   True

3. **Who addresses PostalPro visits?**

   National Call Center

UNITED STATES POSTAL SERVICE

Activity

Activity Instructions: Use the annotation tool to mark your answers.

Which of the following pieces of information are required when creating a USPS.com account?

Account Type	**Business Address**
Email Address	**Credit Card**

Activity

1. Customer asks, "I am trying to reset my password. I entered the temporary password, but I am getting an error message. Now, what do I do?"

2. From where can customers access Click-N-Ship Business Pro?

3. Customer asks "How do I go about getting a CRID?" What should you do?

- ☒ Submit a Lead.

- ☒ Transfer the customer to PostalOne.

- ☑ Direct the customer to register in the Business Customer Gateway.

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Activity

True or False. Customers can directly request support from a Returns Specialist through USPS.com.

True	False

Congratulations!

You have completed Module 3.

Small Business Associate Training

Every Door Direct Mail

SBA SBA Training

Module 4: EDDM

- Module 1: Introduction to SBA

- Module 2: SBA Advanced Customer Service

- Module 3: USPS.com and Customer Registration

- Module 4: EDDM

  - Lesson 1: Introduction to EDDM

  - Lesson 2: Forms

  - Lesson 3: Payment Methods

  - Lesson 4: Size Requirements

  - Lesson 5: USPS.com

  - Lesson 6: Business Mail Entry Unit

  - Lesson 7: Refunds

  - Lesson 8: Practice

- Course Assessment and Nesting

Module Duration: 7 hours

Best Practice
• Do not rush ahead of the customer.
• Check in with the customer.
• Use active listening and ask further probing questions.

Learning Objectives

At the end of this lesson, you will be able to:

- Identify characteristics of EDDM Retail

- Identify characteristics of BMEU

- Define Saturation Mailing

- Identify Retail Indicia guidelines

Lesson 1: Introduction to EDDM

Video

Using Every Door Direct Mail

EDDM is an affordable targeted advertising technique that lets you map yo... size.

EDD...	...**EU)**
For ser... pieces...	
Requir... USPS.c...	...on

EDDM Retail

- Must register on USPS.com
- 5000 max per mailing, per order, per post office
- No permit required
- Simplified label format
- EDDM Retail Indicia
- Weight max 3.3 oz.
- Card stock paper
- Bundles of 50 or 100
- Facing slips and forms
- Allow 2-3 business days to deliver
- Payment: cash, check, credit card, meter strips
- Induct at Delivery destination Unit (DDU) or LPO of delivery

EDDM is an affordable targeted advertising technique that lets you map yo~~...~~
size.

EDDM ... **EU)**

For se~~...~~ pieces...

Requir~~...~~ USPS.c~~...~~ ...on

EDDM BMEU

- Register on Business Customer Gateway
- More than 5000
- Permit required
- Simplified label
- EDDM Permit Indicia
- Weight max 16 oz.
- Envelopes and boxes accepted
- Bundles of 50 or 100
- Facing slips and forms
- Allow 2-3 business days or sooner
- Payment: permit accounts
- Induct at BMEU Permit location

EDDM Retail is a retail-only service available to mailers to distribute mass mailings for their customers located in the areas serviced by a single local Post Office.

WHAT IS EDDM?

Using EDDM Retail, mailers can reach potential customers in neighborhoods without a mailing list.

- No names or addresses are required

- Mailpieces must include "Local Postal Customer" in the address area

Using our Mapping Tool, customers can:

- Choose delivery routes

- Prepare mail pieces

- Drop off mailpieces

We will deliver to active addresses in the areas designated.

- Schedule deliveries of Marketing Mail without an address list

- Send local mailings or national mailings

- Seek new customers

Demo

Knowledge article: **Every Door Direct Mail (EDDM) – Retail**

**EDDM services puts the marketing message
into the hands of the customer.**

- Log in or register on USPS.com.

- Choose routes.

- Choose the payment method.

- Save the order.

- Mailpieces must meet minimum and maximum requirements.

- Each mailpiece must display the Retail indicia.

- Mailpieces must be bundled according to the rules.

- Mailing must be accompanied by proper documents.

- Mailing may be up to 5,000 mailpieces per day, per ZIP Code.

UNITED STATES POSTAL SERVICE

Demo

Knowledge article: **Every Door Direct Mail (EDDM)**

- Sender must have USPS Marketing Mail Permit number.

- Orders must be paid with a Permit.

- Mailpieces are inducted where the BMEU Permit is held.

- Proper documents are required at induction.

- The sender must be registered in the BCG and use the online tool to access discounted prices.

- Mailpieces must meet minimum and maximum requirements.

- Each mailpiece must display the Permit indicia.

- Mail pieces must be bundled according to the rules.

- Mailing must contain a minimum of 200 mailpieces.

Knowledge articles:
- **EDDM and EDDM Retail Comparison**
- **Every Door Direct Mail (EDDM) – Retail**
  - **Every Door Direct Mail Factsheet**

EDDM MAILINGS

Activity

Activity Instructions:
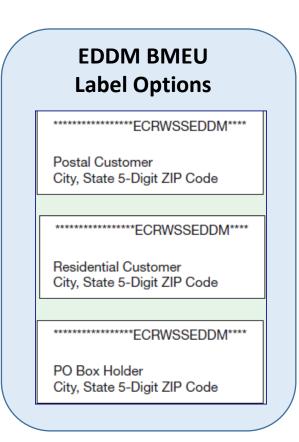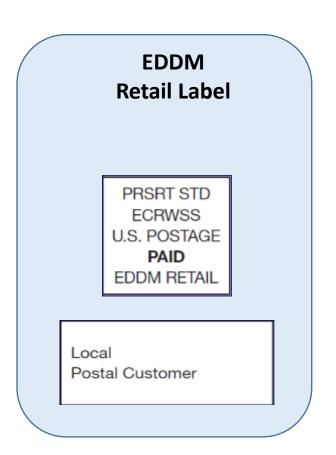
Use the annotation tool to provide your answers.

1. What acronym is displayed in the address area of every EDDM Indicia, within the permit indicia?   **ECRWSS**

2. The EDDM Retail Indicia does not have a specific size requirement, but must be larger than __**.5" x .5"**__.

3. The typeface must be in all caps and at least a __**4**__ point size.

4. Where is the Indicia placed within address area?
Upper-right corner

5. How much space should be around the top and right edge?
1/8"

UNITED STATES POSTAL SERVICE

Knowledge article: **EDDM Registration and Access**

EDDM BMEU Label Options

****************ECRWSSEDDM****

Postal Customer
City, State 5-Digit ZIP Code

****************ECRWSSEDDM****

Residential Customer
City, State 5-Digit ZIP Code

****************ECRWSSEDDM****

PO Box Holder
City, State 5-Digit ZIP Code

EDDM Retail Label

PRSRT STD
ECRWSS
U.S. POSTAGE
PAID
EDDM RETAIL

Local
Postal Customer

Activity

Activity Instructions:

1. Use the Raise Hand tool in Zoom to provide an answer to the question.

2. Complete the Recap Question worksheet in the Participant Guide.

1. True
2. False
3. True
4. True
5. False
6. True
7. True
8. True
9. True
10. False
11. False
12. True

Customer printed mailpieces and forgot to put the address format on the mailpiece. Can they still induct the mailing?

Yes. The customer can use self-adhesive labels with proper label requirements.

Complete the Question Handout.

- Module 1: Introduction to SBA

- Module 2: SBA Advanced Customer Service

- Module 3: USPS.com and Customer Registration

- Module 4: EDDM
    - Lesson 1: Introduction to EDDM
    - Lesson 2: Forms
    - Lesson 3: Payment Methods
    - Lesson 4: Size Requirements
    - Lesson 5: USPS.com
    - Lesson 6: Business Mail Entry Unit
    - Lesson 7: Refunds
    - Lesson 8: Practice

- Course Assessment and Nesting

Learning Objectives

At the end of this lesson, you will be able to:

- Identify EDDM Retail and BMEU forms

- Describe how to fill out EDDM forms

Lesson 2: Forms

UNITED STATES POSTAL SERVICE

Demo

Knowledge article: **Every Door Direct Mail (EDDM) – Retail**

United States Postal Service
Every Door Direct Mail (EDDM) Retail®

Post Office: Note Mail Arrival Date & Time (Do Not Round Stamp)

Mailer

| Name and Address of Individual or Organization for Which Mailing is Prepared | Telephone | Name and Address of Mailing Agent (if other than mailer) | Telephone |

Customer Registration I.D. (CRID)

Customer Registration I.D. (CRID)

Mailing

| Post Office of Mailing | Processing Category ☐ EDDM Flats | Mailer's Mailing Date | Total # of Bundles | Total # of Pieces per Bundle |

| Type of Postage ☐ EDDM Retail Indicia ☐ Metered ☐ Meter Strip | Delivery Type | Weight of a Single Piece __ . __ ounces Max Weight 3.3 ounces | Every Door Direct Mail Barcode |
| | Route Type(s) | Incentive/Discount Claimed | |

| Entry | Price Category | Price | No. of Pieces | Subtotal Postage | Incentive/Discount Amount | Total Postage | Status | Affix Meter Strip Here |

- Mailers must include the bundle count.
- The recommended bundle size is 50 to 100 pieces, depending on the thickness of the mailpiece.
- The default quantity is 50.

Demo

Knowledge article: **Every Door Direct Mail (EDDM)**

- Postage Statement - Nonprofit USPS Marketing Mail PS Form 3602-N

- Plant-Verified Drop Shipment (PVDS) Verification and Clearance PS Form 8125

- EDDM BMEU Facing Slip

- Mailing Permit Application and Customer Profile PS Form 3615

https://gateway.usps.com/eAdmin/view/signin

UNITED STATES POSTAL SERVICE

I printed my Forms, but they don't have barcodes. What happened?

Forms must be printed from **within** the EDDM tool to have the barcode. If they are printed from USPS.com, the form will not have the barcode.

- Module 1: Introduction to SBA

- Module 2: SBA Advanced Customer Service

- Module 3: USPS.com and Customer Registration

- Module 4: EDDM

    - Lesson 1: Introduction to EDDM

    - Lesson 2: Forms

    - Lesson 3: Payment Methods

    - Lesson 4: Size Requirements

    - Lesson 5: USPS.com

    - Lesson 6: Business Mail Entry Unit

    - Lesson 7: Refunds

    - Lesson 8: Practice

- Course Assessment and Nesting

Lesson 3: Payment Methods

Learning Objectives

At the end of this lesson, you will be able to:

- Define the EDDM payment types

UNITED STATES POSTAL SERVICE

Demo

EDDM Retail

- Must register on USPS.com
- 5000 max per mailing, per order, per post office
- No permit required
- Simplified label format
- EDDM Retail Indicia
- Weight max 3.3 oz.
- Card stock paper
- Bundles of 50 or 100
- Facing slips and forms
- Allow 2-3 business days to deliver
- Payment: cash, check, credit card, meter strips
- Induct at Delivery destination Unit (DDU) or LPO of delivery
- Pay at the Post Office
- Pay online
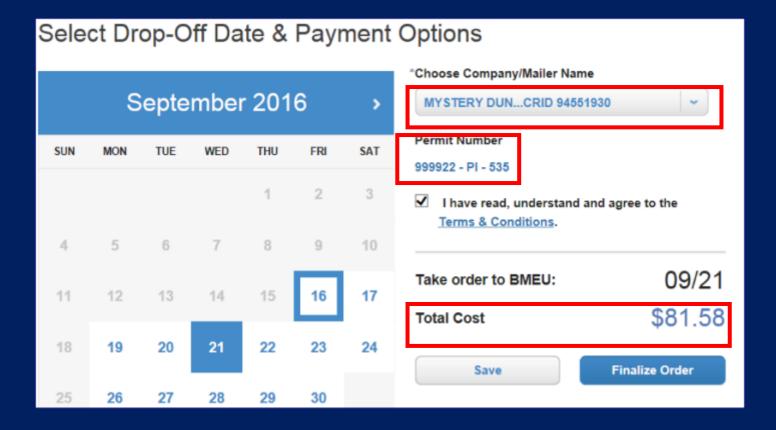
Select D

SUN   MO

4   5

11   12

18

UNITED STATES
POSTAL SERVICE

Demo

Knowledge article: **Every Door Direct Mail (EDDM)**

- Choose Company Name and CRID

- Confirm Permit Number

- Enter BMEU induction date

Select Drop-Off Date & Payment Options

September 2016 >

SUN	MON	TUE	WED	THU	FRI	SAT
				1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	

*Choose Company/Mailer Name

MYSTERY DUN...CRID 94551930

Permit Number

999922 - PI - 535

☑ I have read, understand and agree to the
Terms & Conditions.

Take order to BMEU: 09/21

Total Cost $81.58

Save   Finalize Order

![USPS United States Postal Service logo]

Activity

Activity Instructions:

Use the annotation tool to mark your answer.

Business customer has a permit but wants to induct over the Retail Counter. Can they pay with their permit?

| Yes | No |

- Module 1: Introduction to SBA

- Module 2: SBA Advanced Customer Service

- Module 3: USPS.com and Customer Registration

- Module 4: EDDM
    - Lesson 1: Introduction to EDDM
    - Lesson 2: Forms
    - Lesson 3: Payment Methods
    - Lesson 4: Size Requirements
    - Lesson 5: USPS.com
    - Lesson 6: Business Mail Entry Unit
    - Lesson 7: Refunds
    - Lesson 8: Practice

- Course Assessment and Nesting

Learning Objectives

At the end of this lesson, you will be able to:

- Identify size requirements for EDDM mailers

Lesson 4: Size Requirements

Length measurement

- Minimum Length = 10.5 inches
- Maximum Length = 15 inches

Width measurement
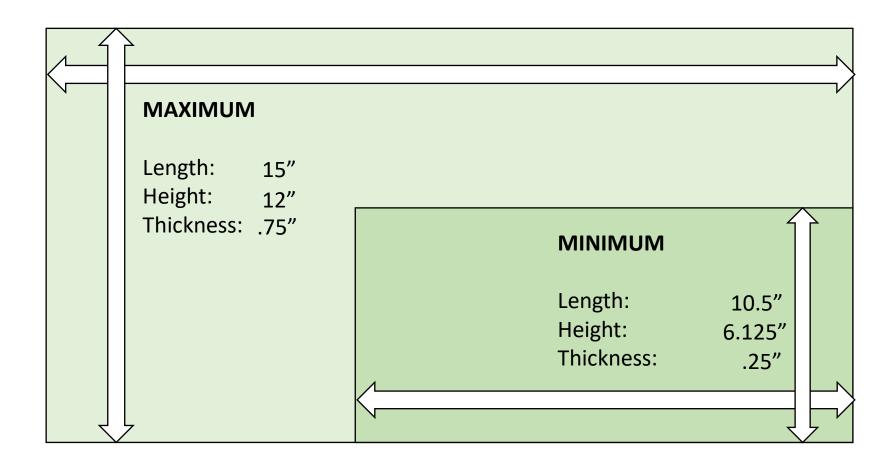
- Minimum Width = 6.125 inches
- Maximum Width = 12 inches

Thickness measurement

- Minimum Thickness = .25 inches
- Maximum Thickness = .75 inches (card stock, equivalent to 3 sheets of paper)

UNITED STATES POSTAL SERVICE

Knowledge article: **Every Door Direct Mail (EDDM)**

MAXIMUM

Length: 15"
Height: 12"
Thickness: .75"

MINIMUM

Length: 10.5"
Height: 6.125"
Thickness: .25"

Activity

Activity Instructions:

Use the Raise Hand tool in Zoom to provide an answer.

The customer has printed all the 4 x 6.5 inch mailpieces. They are bundled and she has the facing slips on them. When she went to the Retail office, the pieces were refused. Why?

The customer's mailing measures 4 x 6 ½ and does not meet the measurement requirements.

- Module 1: Introduction to SBA

- Module 2: SBA Advanced Customer Service

- Module 3: USPS.com and Customer Registration

- Module 4: EDDM
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    - Lesson 3: Payment Methods
    - Lesson 4: Size Requirements
    - Lesson 5: USPS.com
    - Lesson 6: Business Mail Entry Unit
    - Lesson 7: Refunds
    - Lesson 8: Practice

- Course Assessment and Nesting

![United States Postal Service logo]

Lesson 5: USPS.com

Learning Objectives

At the end of this lesson, you will be able to:

- Identify the steps to create an EDDM Mailing

- Use the EDDM Mapping Tool

Demo

USPS.COM® | **Quick Tools** | Send | Receive | Shop | Business | International | Help

Do Not Sign In.

Advertise with EDDM - Video

Advertise Your Business with USPS Every Do...

1:09 / 1:09

EDDM Mail Marketing Transcript (TXT | 4KB)

Price – USPS Marketing Mail™ Flats up to 3.3 oz
EDDM Retail® USPS Marketing Flats $0.177 per piece
EDDM BMEU USPS Marketing Mail at $0.156 per piece

EDDM Mapping Tool

Creating an EDDM Mailing

1. **Create a USPS Account**
   Set up your USPS EDDM or Business Account to get started.
   About USPS EDDM & Business Accounts

2. **Select Your Routes**
   Choose the carrier routes on the EDDM Mapping tool where you think your customers live. The EDDM User Guide illustrates and explains all the steps for choosing delivery routes.
   EDDM Mapping Tool
   EDDM User Guide PDF (5.1 MB) | RTF (0.5 MB)

3. **Create a Mailpiece**
   Select the right type and size mailpiece for EDDM advertising. Choose a clean design with a clear message. Offering a discount with your campaign helps brings in new customers.
   Online Direct Mail Experts

   NOTE: USPS® assumes no liability for the results of any contact with any company listed. Private vendors may apply non-USPS charges.

4. **Find a Printer**
   Online direct mail specialists and some local printers can help format and design, as well as print, your mailpiece.
   Online Experts & Local Printers

5. **Choose Your Drop Off Date**
   You can pay for your mailing online or at the Post Office™ where you drop it off. Select your drop-off date based on how many deliveries you want and where you plan to send them. The EDDM User Guide explains the drop-off steps and options for Retail and Business Mail Entry Unit (BMEU) accounts.
   EDDM User Guide PDF (5.1 MB) | RTF (0.5 MB)

6. **Prepare Mailing Bundles**
   Bundle your mailing in stacks of 50-100 mailpieces. Bundles may not be higher than 6 inches. Direct mail specialists can prepare your mailing as part of your order.

7. **Fill Out Processing Forms**
   Facing slips and EDDM forms tell the Postal Service™ how to process and deliver your order. Attach a facing slip to the top of *every* bundle. If a customer wants to be removed from your mailings, include the customer's address in the "Do Not Deliver Address" column on the facing slip. Write the number of pieces in the bundle on the facing slip.
   EDDM Postal Forms

8. **Pay for Postage**
   Pay with a free USPS.com® account online or pay at the Post Office™. Charges are based on the type of account you have and the size of your mailing.
   EDDM Postage

9. **Submit Your Mailing**
   Take or send your mailing to a Post Office for delivery.
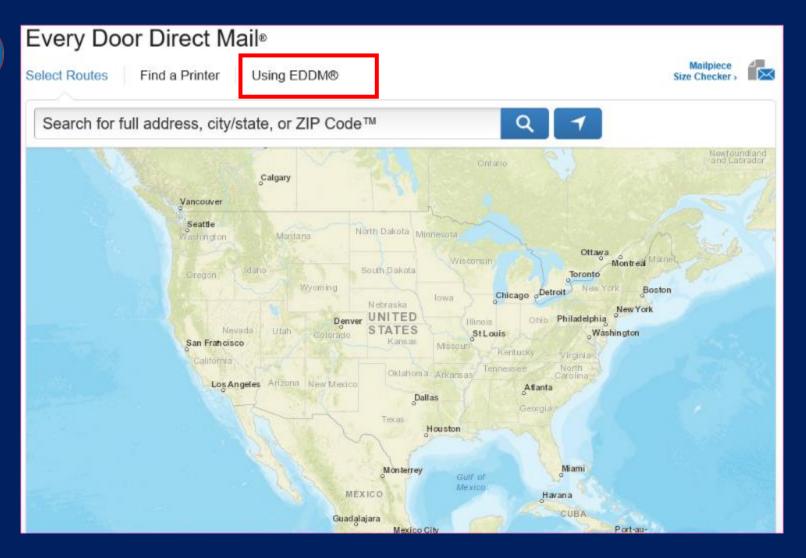
EDDM Quick Reference

- EDDM Quick Reference Sheet (PDF | 608 KB)
- EDDM Retail® Fact Sheet PDF (248 KB) | RTF (50 KB)
- EDDM BMEU™ Fact Sheet PDF (215 KB) | RTF (1.7 KB)
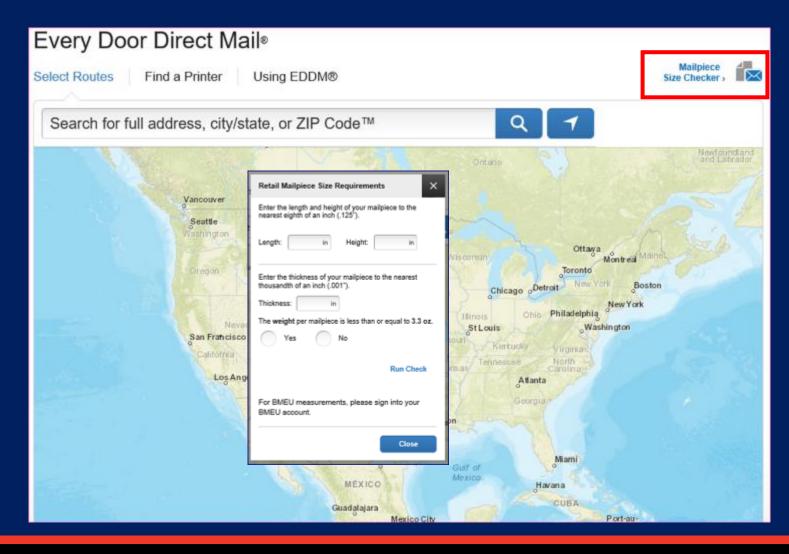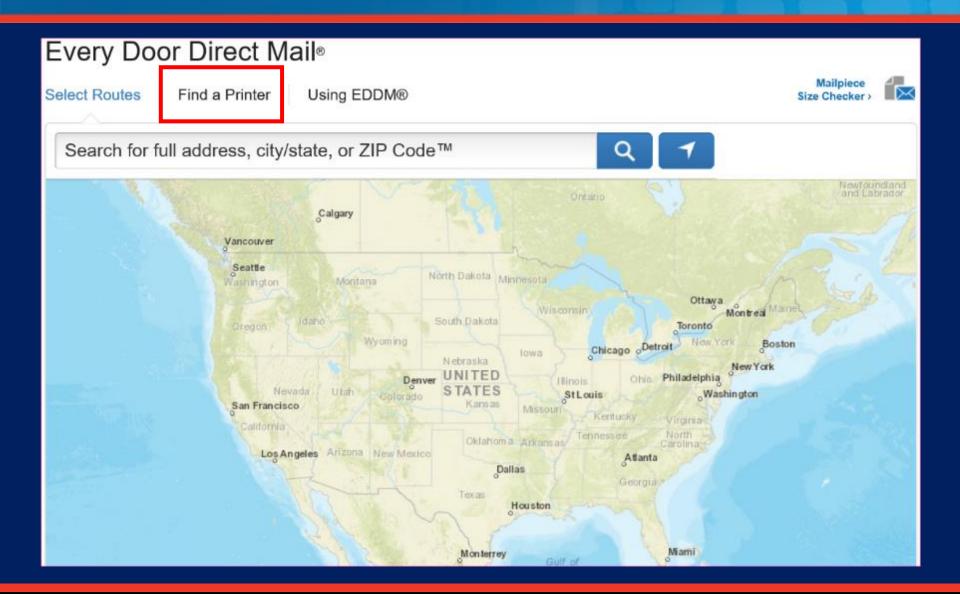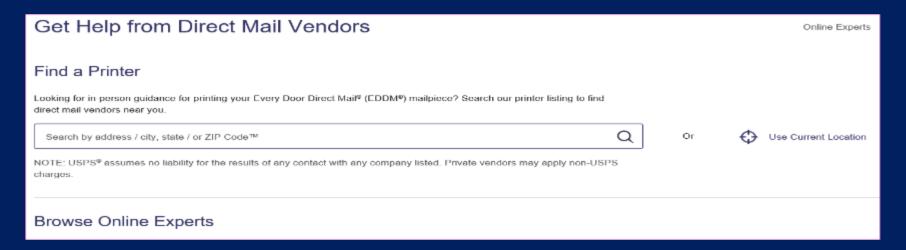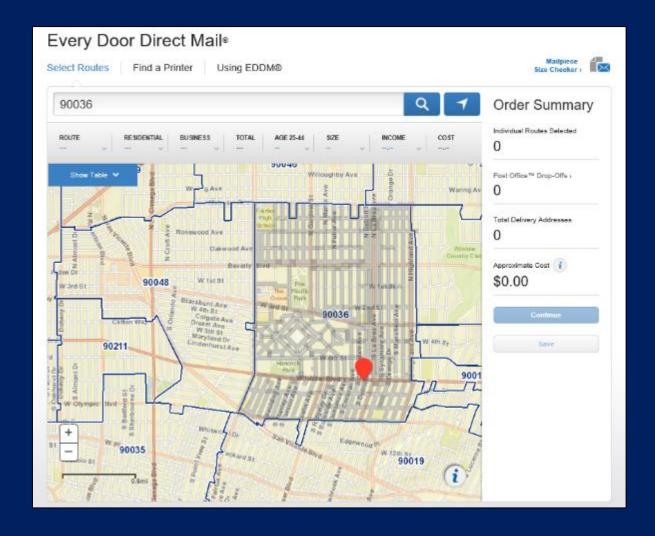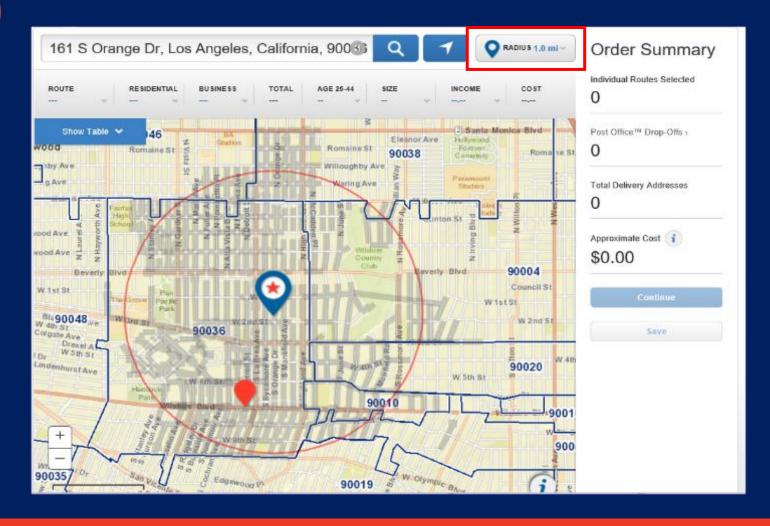
Knowledge article: **USPS Printer Directory FAQs**

ROUTE / Identifies the particular route by ZIP Code™ and carrier route ID.

Note that it is not possible to select a partial route.

RESIDENTIAL / Indicates the number of residential delivery points in a given route.

BUSINESS / Indicates the number of business delivery points in a given route.

TOTAL / Indicates the total number of delivery points in a given route.

AGE / Indicates the percentage of each route that matches a given age range criteria.

SIZE / Indicates the average household size of a given route.

INCOME / Indicates the average household income of a given route.

COST / Indicates total estimated cost for mailings included within that route.

USPS.COM

Sign In To Your Account

Already have an account?

Enter Your Username and Password ❓

* indicates a required field

* Username

[   ]

* Password

[   ]

Sign In

Forgot your username? ❓
Forgot your password? ❓

New to USPS.com?

Create a USPS.com Account to...

- print shipping labels.
- request a Package Pickup.
- buy stamps and shop.
- manage PO boxes.
- print custom forms online.
- file domestic claims.
- set a preferred language.
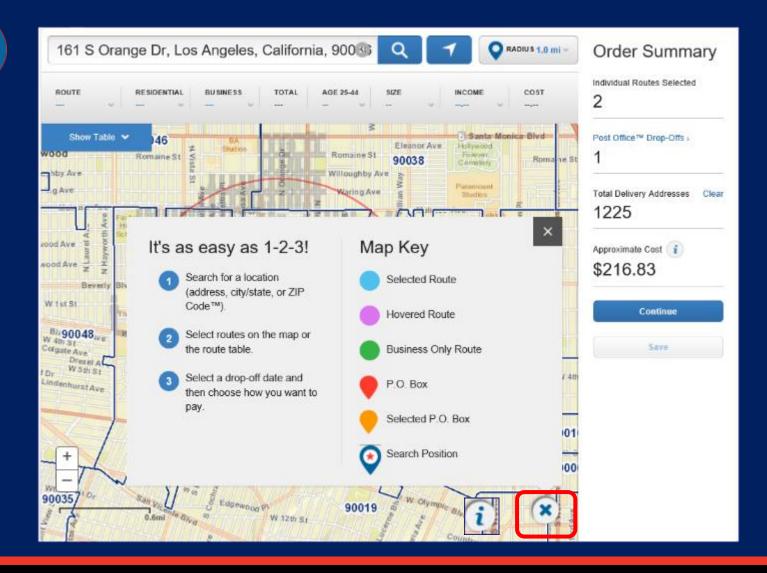
Sign Up Now
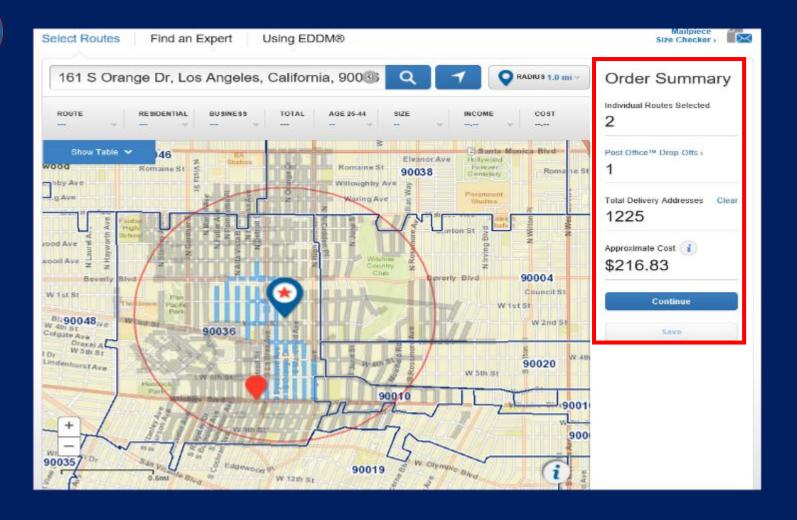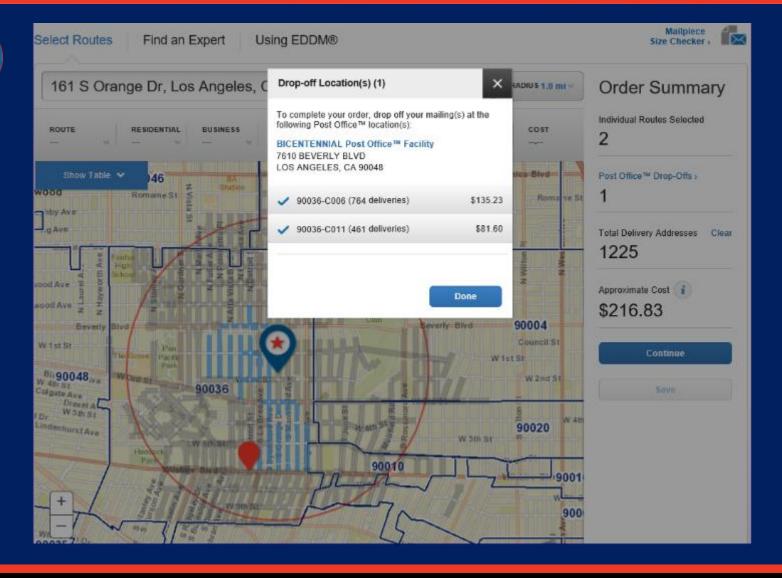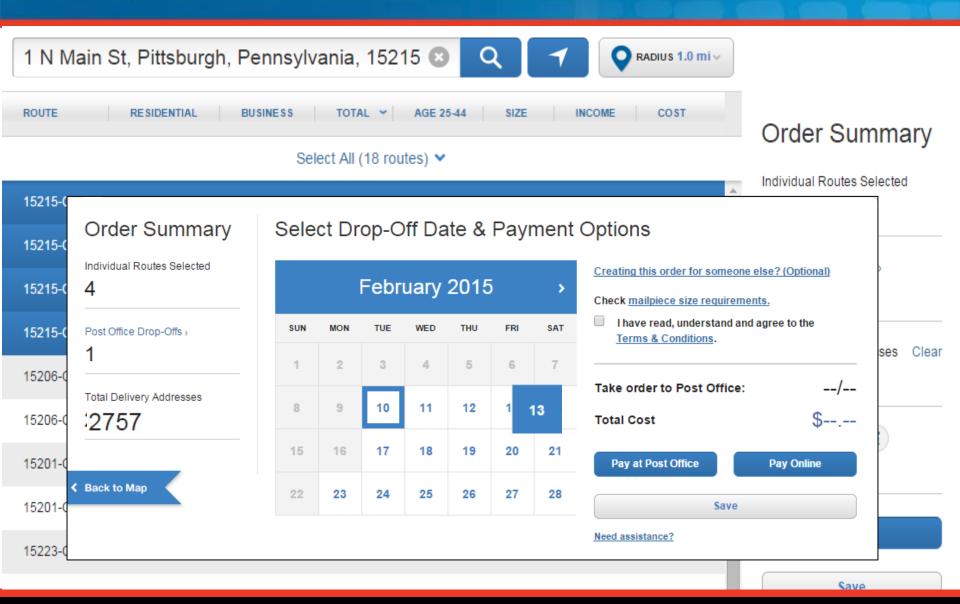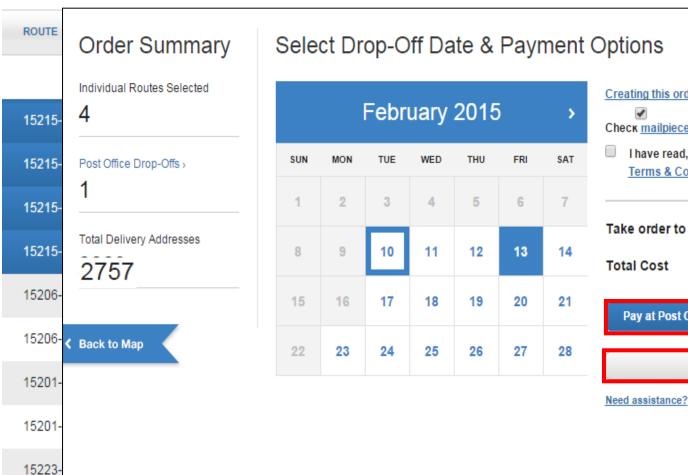
UNITED STATES POSTAL SERVICE

Thank You for Your Order

Henry Barber
Account # - 79700794
CRID # - 17112378

Your Order Number: **2501832**

Post Office Drop-offs Required:	1
Individual Routes Selected:	4
Delivery Addresses:	3152
Cost of Order:	$576.82
Payment Method:	Pay at Post Office
Drop Off Order On:	Friday, June 19, 2015

Check your email for an order confirmation.

Other Actions

Create a New EDDM Order ›

View Order History ›

View Saved Orders ›

Add Order as a Favorite ›

Cancel Your Order ›

What do I do next?

1. Double-check your mailpieces.

There are size and label restrictions for mailpieces sent through Every Door Direct Mail®. Use our Mailpiece Size Requirements tool and read our Quick Reference Guide to make sure your mailpieces will be accepted.

2. Prepare your mail bundles.

We recommend that you organize your routes in bundles of **50-100** pieces.

3. Print out your forms.

You will need to have **1** separate Facing Slip for **each** bundle you create.

For example:
*Bundles of 50 would require **64** Facing Slips.*
*Bundles of 100 would require **32** Facing Slips.*

ALEXANDRIA POST OFFICE (4 routes, 3152 delivery addresses)
22302-C007   536 delivery addresses
22302-C008   561 delivery addresses
22304-C046   1039 delivery addresses
22314-C052   1016 delivery addresses

Download Mailing Statement (2 pages) (USPS Form PS3587) ›

Download Facing Slips (1 page/route) ›

To print all pages at once:

Print All Forms Now

4. Bring your mailing(s) and forms to the above Post Office(s) on:
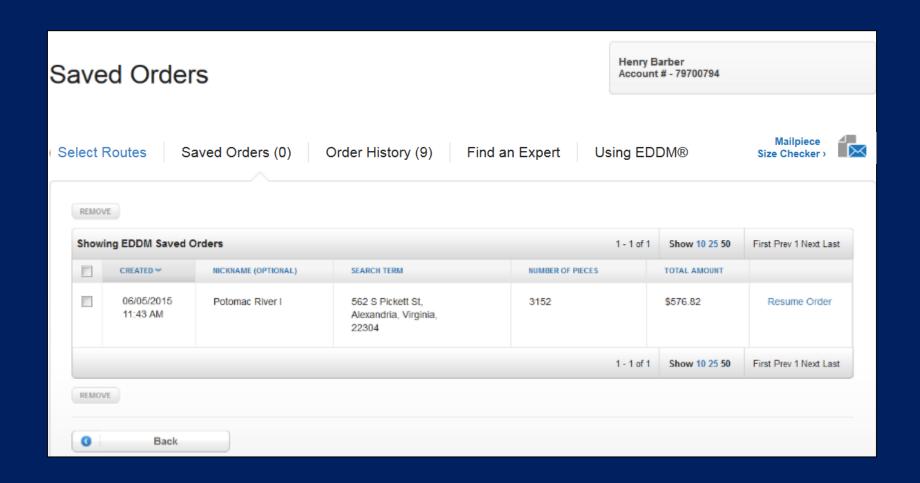
Friday, June 19, 2015.

For more information, see the Retail Post Office Listing Form.

5. Payment Information
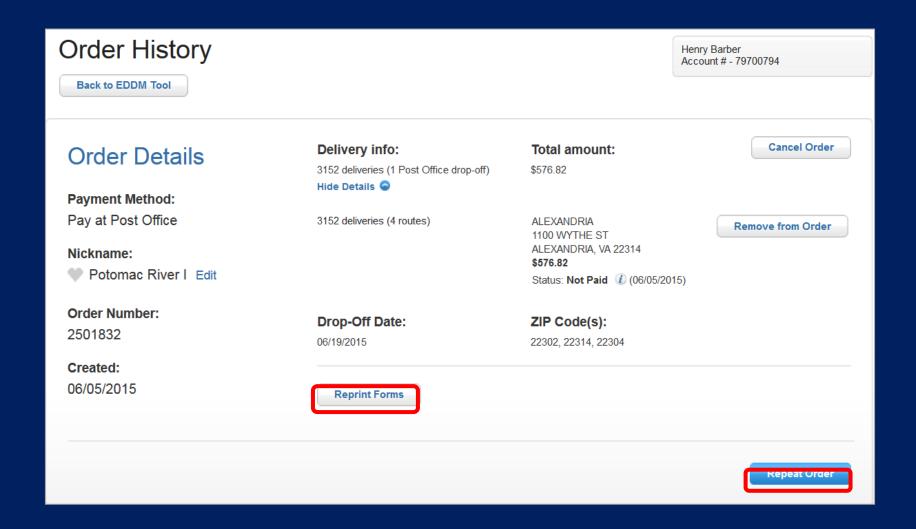
Each Post Office accepts Cash, Debit/Credit Cards, Meter Strips, Check or Money Orders (made payable to "US Postal Service" or "Postmaster") for Every Door Direct Mail - Retail® with the approved Retail Indicia on each mailpiece.
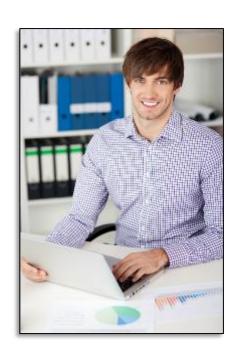
UNITED STATES POSTAL SERVICE

Order History

Henry Barber
Account # - 79700794

Back to EDDM Tool

Order Details

Payment Method:
Pay at Post Office

Nickname:
🤍 Potomac River I Edit

Order Number:
2501832

Created:
06/05/2015

Delivery info:
3152 deliveries (1 Post Office drop-off)
Hide Details 🔼

3152 deliveries (4 routes)

Drop-Off Date:
06/19/2015

Total amount:
$576.82

ALEXANDRIA
1100 WYTHE ST
ALEXANDRIA, VA 22314
$576.82
Status: **Not Paid** ⓘ (06/05/2015)

ZIP Code(s):
22302, 22314, 22304

Cancel Order

Remove from Order

Reprint Forms

Repeat Order

Activity Instructions:

Use annotation tool to provide an answer.

For six bundles, how many copies need to be made?

Five more

Activity

Activity Instructions:

Complete the EDDM Activity Checklist in the Participant Guide.

Instructions

- Maximize the Tool.

- Get the best price, best routes, with the largest households.

- Stay within the budget.

Details

- Within a few blocks of their restaurant

- More than 2 people/household

- 25-40 year old age bracket

- Businesses and residences

- Budget of $500

1209 Cannon Ct., NE
Leesburg, VA 20176

Activity Instructions:

Using the criteria to assist the Trainer in the necessary steps to purchase an EDDM retail product.

- Retail Customer- Potomac River Pub

- 652 S. Pickett Street, Alexandria, VA 22304

- New customer

- All residence and business routes within a 5 mile radius

- Household-Size: 1.5

- Ages: 25 – 55

- Target Income: $55,000+

- Budget: $700.00

- Mailout Date: Two weeks from today.

Close this PPT and transfer to the CAT environment

Activity

1. Which Mapping Tool function (or tool) enables you to search across ZIP Codes by entering an address in the Search Bar?

2. What information does the Order Summary provide?

Activity Instructions:

Use the annotation tool to mark your answers.

☑ Post Office drop off

☑ Total delivery addresses

☑ Approximate cost

- Module 1: Introduction to SBA

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    - Lesson 5: USPS.com
    - Lesson 6: Business Mail Entry Unit
    - Lesson 7: Refunds
    - Lesson 8: Practice

- Course Assessment and Nesting

Learning Objectives

At the end of this lesson, you will be able to:

- Distinguish between EDDM Retail and BMEU customers

- Explain how to use the EDDM Admin Tool

- Identify the BMEU escalation process

Lesson 6: Business Mail Entry Units

Knowledge article: **Every Door Direct Mail (EDDM)**

- Any number of mailpieces over 200 per day weighing up to 16 ounces or less.

- Deposit mailing at Business Mail Entry Unit (BMEU) for delivery to any ZIP Code in the country.

- Pay postage with permit imprint, pre-canceled stamps, or metered postage.

- BMEU customers can choose the Retail option if the order is less than 5000 pieces.
    - Must induct at the delivery destination unit (DDU), pay the Retail price, and use Retail indicia and forms
    - Can pay with credit card

- EDDM BMEU customers use the Postal Wizard in the Business Customer Gateway (BCG) to print Forms and Postage Statements.

- Transfer customers with questions on the Postal Wizard or how to complete forms to PostalOne!

- PS Form 3602-N for Nonprofit USPS Marketing Mail is in the EDDM BMEU Forms page.

- Customers must link their permit number in the BCG for BMEU induction, PMOD, and reduced pricing.

- Mailing lists and delivery sequence-specific addresses are not required.

- BMEU customers choose the container type: Trays, Sacks, Pallets.

- Orders can be saved and reprinted.

- Unique ZIP Codes for Universities and Government Agencies are excluded from EDDM.

- Each Route listed for EDDM and EDDM Retail is updated in the Address Information System on the third Saturday of every month to ensure current active addresses.

- EDDM mailpiece can be placed in an envelope as long as the envelope meets the size requirements.

UNITED STATES POSTAL SERVICE

Activity

Activity Instructions: Use the annotation tool to draw a line to the correct answer.

1. I am sending out a summer special mailer for my music studio. I want to reach the neighborhoods around my home.

2. My business is in several states and we are using a direct marketing campaign to reach several thousand potential customers.

3. We only pay for our EDDM order with a permit.

4. I would like to pay for this at the Post Office with a check.

5. Actually, my mailer is about half a pound because I'm including a free sample.

RETAIL

BMEU

Louis Brown
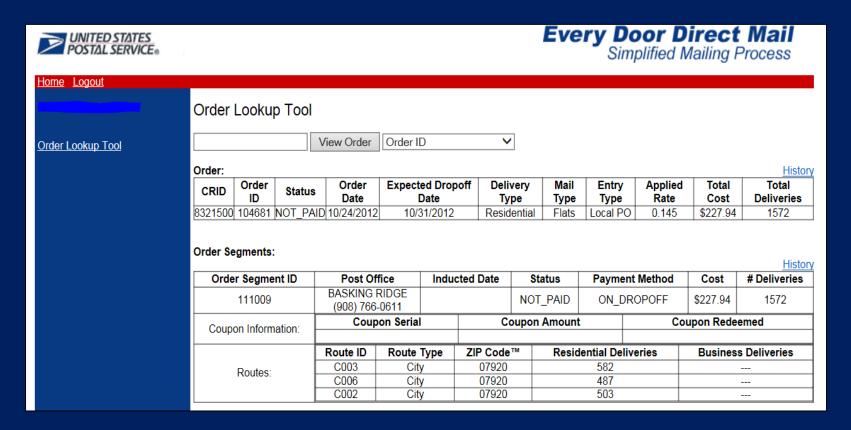
How is this customer different from a retail customer? What information and solution can we offer?

- The customer is mailing a large number of pieces (at least 20,000 pieces).

- If a mailer has not been printed, the customer can go to the Affiliates page (and select a printer) or access the Printer Directory page, and select one from the list
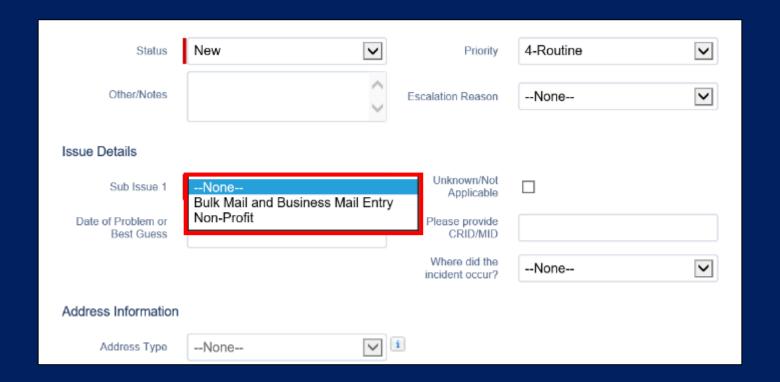
Knowledge article: **EDDM Admin Tool**

Knowledge article: **Submitting an SBA Question –Advisor Guidelines**

UNITED STATES
POSTAL SERVICE

Activity

Activity Instructions: Use the annotation tool to type a "C" or "T" beside each statement.

1. I'm seeking advice on Marketing Mail Options. **C**

2. I have a technical issue with something related to the website. **T**

3. I need help navigating Mapping Tool. **C**

4. I cannot print forms in the Postal Wizard. **T**

5. I want to understand the bundling requirements better. **C**

6. I want to know how to get a CRID. **C**

UNITED STATES
POSTAL SERVICE

Activity

Activity Instructions: Listen to each audio recording. Use the annotation tool to mark the correct action (Transfer or Continue) in the appropriate column.

	Transfer	**Continue**	**Why?**
A.		☑	The customer is asking business related questions.
B.		☑	The customer needs basic information.
C.	☑		This customer needs to be referred to their BMEU.
D.		☑	This customer needs basic product help.

Activity

Activity Instructions:

Use the annotation tool to mark the answer to each question as it displays.

True or False? BMEU customers can choose the Retail option if the order is less than 5000 pieces.

True | **False**

True or False? Mailing lists and delivery sequence-specific addresses are required.

True | **False**

True or False? The EDDM Admin Tool is used to look up the customer's order and provide a status.

True | **False**

- Module 1: Introduction to SBA
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    - Lesson 6: Business Mail Entry Unit
    - Lesson 7: Refunds
    - Lesson 8: Practice
- Course Assessment and Nesting

Learning Objectives
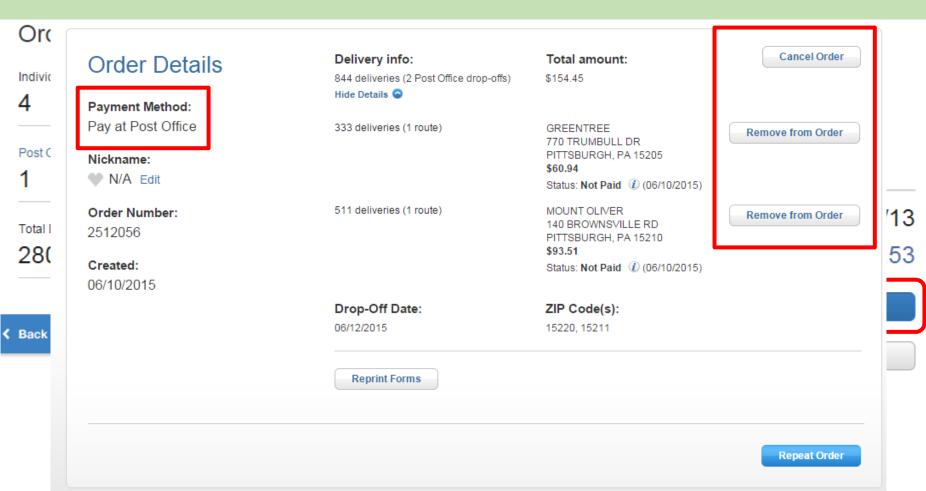
At the end of this lesson, you will be able to:

- Identify EDDM refund options

- Identify EDDM refund limitations

Lesson 7: Refunds

UNITED STATES POSTAL SERVICE

Knowledge article: **SBA: EDDM Retail Refund Process**

Order Details

Payment Method:
Pay at Post Office

Nickname:
♥ N/A Edit

Order Number:
2512056

Created:
06/10/2015

Delivery info:
844 deliveries (2 Post Office drop-offs)
Hide Details ⌃

333 deliveries (1 route)

511 deliveries (1 route)

Drop-Off Date:
06/12/2015

Total amount:
$154.45

GREENTREE
770 TRUMBULL DR
PITTSBURGH, PA 15205
$60.94
Status: **Not Paid** ⓘ (06/10/2015)

MOUNT OLIVER
140 BROWNSVILLE RD
PITTSBURGH, PA 15210
$93.51
Status: **Not Paid** ⓘ (06/10/2015)

ZIP Code(s):
15220, 15211

Cancel Order

Remove from Order

Remove from Order

Reprint Forms

< Back

Repeat Order

Order History

Back to EDDM Tool

Your Customer
Account# - 1234678

Order Details

Payment Method:
Paid Online

Nickname:
♥ N/A Edit

Order Number:
74783

Created:
06/05/2015

Delivery info:
451 deliveries (2 Post Office drop-offs)
Hide Details ⌃

204 deliveries (1 route)

247 deliveries (1 route)

Drop-Off Date:
06/13/2015

Total amount:
$82.53

ALLENTOWN AIRPORT
1000 POSTAL RD SIDE
ALLENTOWN, PA 18109
$37.33
Status: **Paid Online** ⓘ (06/05/2015)

COLUMBIA
1601 ASSEMBLY ST
COLUMBIA, SC 29201
$45.20
Status: **Paid Online** ⓘ (06/05/2015)

ZIP Code(s):
29201, 18104

Request a Refund

Reprint Forms

Repeat Order

- Pay at Post Office (LPO)
  - Not paid yet? Cancel order or remove drop-off locations from the order
  - Paid already? Work with each LPO to request a refund

- Paid Online
  - Request a full refund or partial refund (for individual drop-off locations)
  - Request must be submitted prior to the order drop off

Activity

Activity Instructions:

1. Use the Raise Hand tool in Zoom to provide an answer.

I created an EDDM order and would like to cancel part of it. I already paid online, so I think I need to request a refund, as well. Is that possible?

Please keep in mind that USPS can only refund a portion of your order if you have selected multiple drop-off locations. You will only be able to remove a drop-off location and its included routes, not individual routes by themselves. Does your order have multiple drop-off locations?

Activity

Activity Instructions:

1. Use the Raise Hand tool in Zoom to provide an answer.

The customer has responded that she has two drop-off locations. Can she do this?

Yes	No

Remember, this is a customer who paid online for her order. What if she doesn't see a refund button? What is a reason that the refund button is not available?"

She is requesting a refund after dropping off the order at the Post Offices.

UNITED STATES POSTAL SERVICE

Activity

Activity Instructions:

1. Use the Raise Hand tool in Zoom to provide an answer.

Were you able to request a refund?

Yes, I had no problem.

Good. You will notice a change on the Order Details page. The status of the drop-off location that you refunded has changed to Pending Refund. If you decide to refund any other portions of your order, you may do so by following the same steps you just went through. However, a refund must be requested prior to dropping the order off at the Post Office. Also, please allow 5-7 days for the refund to be reflected in your credit card or bank statement.

UNITED STATES
POSTAL SERVICE

Activity

Activity Instructions:

Use Chat to answer the questions.

1. **A customer is inquiring about a refund for an EDDM order submitted online, but was paying at the Post Office. Where should you direct the customer?**

   If the customer already paid, the SBA should direct him to the Post Office where the payment was made. If a payment has not been made, the customer can cancel the order online or simply not do the drop off.

2. **From when does the 60-day time limit for refund requests begin?**

   From when the order was placed and payment was transacted

3. **True or False? Customer with orders containing multiple drop-off locations may request partial refunds.**

   True

- Module 1: Introduction to SBA

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- Course Assessment and Nesting

This lesson will provide SBAs with opportunities to practice using directive language, asking probing questions, using the EDDM tool, and educating our clients on the benefits and features of EDDM.

Lesson 8: Practice

UNITED STATES
POSTAL SERVICE

Activity

Ask Probing Questions... Educate Customers

"My construction business is not getting those customer referrals I used to get. I've been focused on residential construction, but I think I've got too much competition there. I was thinking of doing a direct advertisement, but I'm not sure that sending something to a bunch of neighborhoods is going to work. Can you help?"

Activity Instructions:

1. Use the Raise Hand tool in Zoom to play the SBA receiving the call.

2. Provide a response to the "customer" as you would on a real call.

The SBA recommends and navigates the customer to EDDM.

Note: If the customer were focusing on commercial construction, EDDM would not be appropriate.

The SBA can show the EDDM Quick Reference sheets.

Activity

Ask Probing Questions… Educate Customers

"The last EDDM order I had was a few months ago and I want to do another one. I have a music studio out of my house and want to connect with families with children. I'm not sure I did a good job doing that last time because I only got one student from that mailer. Can you help?"

Activity Instructions:

1. Use the Raise Hand tool in Zoom to play the SBA receiving the call.

2. Provide a response to the "customer" as you would on a real call.

SBA should demonstrate the filtering capabilities in EDDM (e.g., age range, household income, household size)

Note: The mailpiece can be assessed to determine if the message is clear and the appropriate demographics were targeted.

UNITED STATES
POSTAL SERVICE

Activity

Activity Instructions:

1. Complete Practice 1 of the Practice Worksheet in the Participant Guide.

2. Use the Raise Hand tool in Zoom to share your results.

Create an Order

- We are a Charter School and we want to get the word out to our community for September open enrollment.

- We need to reach residents with families.

- The address is: 1809 Louisiana St, Houston, TX 77002.

- Our budget is $1,500.00.

UNITED STATES
POSTAL SERVICE

Activity

Activity Instructions:

1. Complete Practice 2 of the Practice Worksheet in the Participant Guide.

2. Use the Raise Hand tool in Zoom to share your results.

Provide a Resolution

I sell artwork at craft shows and festivals. Can I send a mailer to a specific town that I'm working next. I don't have an address and I don't want to spend too much. I do want to make sure that the right people get my advertisement. Can you help?

▪ The next festival is in REHOBOTH BEACH, DE.

▪ My budget is $500.00.

Activity

Activity Instructions:

1. Complete Practice 3 of the Practice Worksheet in the Participant Guide.

2. Use the Raise Hand tool in Zoom to share your answer.

Educate… Resolve

I'm calling about placing my first EDDM® order. I'm a little confused about printing the indicia, bundling, and sizes.

Also, can I pay with my credit card?

Activity

Check Order Status

I placed an EDDM order last week and the printer didn't complete the order yet. Can I get a refund? I paid by credit card.

My order number is 104681.

Activity Instructions:

Use the Raise Hand tool in Zoom to assist the Trainer (i.e., "SBA") check the order status.

Activity

Provide Recommendations

We are a Senior community and we are having an Open House over the holidays. How can we get the word out? We are already in the local newspapers.

Activity Instructions:

1. Complete Practice 5 of the Practice Worksheet in the Participant Guide.

2. Use the Raise Hand tool in Zoom to share your answer.

Activity

Activity Instructions:

1. Complete Practice 6 of the Practice Worksheet in the Participant Guide.

2. Use the Raise Hand tool in Zoom to share your answer.

Provide Recommendations

I use EDDM® at least three times a year, but I'm not sure about the results I'm getting.

What can you recommend?

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Activity

Activity Instructions:

Use the Raise Hand tool in Zoom to share your answer.

Scenarios

1. **My order for EDDM is not printing the forms.**

   Ask probing questions first because it could be an issue with the printer, then recommend the customer try again. Last, transfer the call to IC3 in case there's an issue with the tool.

2. **Where do I reprint my forms?**

   In order history in EDDM there is a button to reprint forms.

3. **How do I get the Business Mail Entry prices?**

   Customers need to use the EDDM tool inside the Business Customer Gateway and ensure their permit is linked in order to get reduced prices.

UNITED STATES POSTAL SERVICE

Activity

Activity Instructions:

Use the annotation tool to provide answers to each question.

1. True or False? Business Mail Entry Unit requires a Permit and Registration on BCG.

2. EDDM Retail is a retail-only product that is only available to mailers if:

3. True or False? In order to obtain a barcode on forms such as PS Form 3587: EDDM Retail, you must print from within the EDDM tool on USPS.com.

☑ True

☒ False

Congratulations!

You have completed Module 4.

Pending instructions on Nesting…

2021

UNITED STATES POSTAL SERVICE
Customer Care Center

SBA
Virtual Instructor Led Training

This document is offered as an aid to USPS Customer Care Center staff. As improvement of customer care center operations – through the implementation of new Top Tips and new technologies – is an ongoing USPS objective, this is a living document that may be updated by the USPS Enterprise Customer Care headquarters to reflect the incorporation of USPS change management updates to content.

PARTICIPANT GUIDE
Courseware Version Date: 04/2021

Table of Contents

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Module 1

Products Benefits and Features Worksheet

Purpose: The purpose of this activity is to provide an opportunity for you to use knowledge gained in this module to research and populate information for the listed products and services.

Instructions: Use your research skills to locate the services information for the listed products.
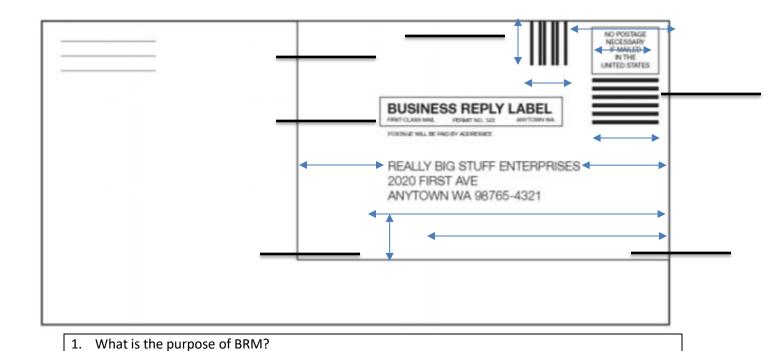
Product	Ship Time	Pricing Options	Included Services	Business Services
Priority Mail Express				
Priority Mail				
First Class Mail				
USPS Retail Ground				
Media Mail				

Module 2
Business Reply Mail
Directions: Label the sections as they are discussed.

BUSINESS REPLY LABEL
FIRST-CLASS MAIL   PERMIT NO. 123   ANYTOWN WA

POSTAGE WILL BE PAID BY ADDRESSEE

NO POSTAGE
NECESSARY
IF MAILED
IN THE
UNITED STATES

REALLY BIG STUFF ENTERPRISES
2020 FIRST AVE
ANYTOWN WA 98765-4321

1. What is the purpose of BRM?	
2. When is BRM appropriate?	
3. Does it require a permit?	
4. What are the payment methods?	
5. What is the Mail Design Analyst?	

Business Services

Address Management

Zone Charts

PO Box Online

Caller Service & Reserve Box Service

Premium Forward Service for Business

Custom Marketing Mail

Module 5

EDDM Retail vs. EDDM BMEU

Directions: Use the table below to document the key characteristics of EDDM Retail and EDDM BMEU as you read and discuss the Knowledge articles.

EDDM Retail	EDDM BMEU
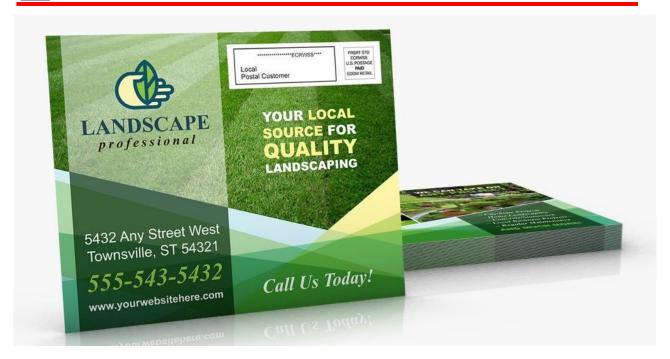
EDDM Marketing Mail Samples

Form Facing Slip

EVERY DOOR DIRECT MAIL
FACING SLIP

5-Digit ZIP Code (Required):	Route Number (Required):	Delivery Type:
Date:	Total # of Mailpieces per Bundle:	Total # of Bundles*: _____ of _____

Do Not Deliver Address	Do Not Deliver Address

Saturation Mail Description	Mailer Information		
	Permit Holder Name:		
	Permit Number:	Permit Type:	Post Office of Mailing:

Mailers must prepare bundles to comply with standards

Generated by USPS -- Every Door Direct Mail Facing Slip   Page 1 of 2

Form 3615

EDDM Activity Checklist

Use the following steps to complete the activity.

1. Navigate to www.eddm.usps.com

2. Sign-In/Register

3. Enter usps.com user name and password

4. Get Started

5. Create Mailing tab

6. Search for Routes

7. Order Summary

8. Drop-Off & Payment Options

9. Terms and Conditions

10. Confirm and Select a Payment Option

11. Shopping Cart

12. Checkout

13. Place My Order

14. Confirmation Page

Practice Worksheet

Log into EDDM CAT environment and create the most effective order for the customer.

Practice 1: **Create an Order**

- We are a Charter School and we want to get the word out to our community for September open enrollment.
- We need to reach residents with families.
- The address is: 1809 Louisiana St, Houston, TX 77002.
- Our budget is $1,500.00.

Practice 2: **Provide a Resolution**

I sell artwork at craft shows and festivals. Can I send a mailer to a specific town that I'm working next. I don't have an address and I don't want to spend too much. I do want to make sure that the right people get my advertisement. Can you help?

- The next festival is in REHOBOTH BEACH, DE.
- My budget is $500.00.

Practice 3: **Educate… Resolve**

I'm calling about placing my first EDDM® order. I'm a little confused about printing the indicia, bundling, and sizes.

Also, can I pay with my credit card?

Notes:

Practice 4: **Check Order Status**

I placed an EDDM order last week and the printer didn't complete the order yet. Can I get a refund? I paid by credit card.

My order number is 104681.

Notes:

Practice 5: **Provide Recommendations**

We are a Senior community and we are having an Open House over the holidays. How can we get the word out? We are already in the local newspapers.

Notes:

Practice 6: **Provide Recommendation**

I use EDDM® at least three times a year, but I'm not sure about the results I'm getting.

What can you recommend?

Notes:

Practice 7: (SBAs can take notes as answers are provided by the class/Trainer)

1. My order for EDDM is not printing the forms.
2. Where do I reprint my forms?
3. How do I get the Business Mail Entry prices?

Notes: