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JUL 13 2021

LABOR RELATIONS

UNITED STATES POSTAL SERVICE

July 9, 2021

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

Certified Mail Tracking Number:
7019 2280 0001 6261 0791

Dear Brian:

This is in further reference to the Postal Service's previous notices, regarding the proof of concept making available to customers the option to communicate with Customer Care Agents through text messaging. The most recent notice was dated April 12 (copy enclosed).

The Enterprise Customer Care (eCC) Short Message Service (SMS) proof of concept testing, which began September 2020 in Wichita, Kansas ended June 2021. The SMS application will be available to all the Customer Care Centers. Customer Care Agent training will begin August 2.

Enclosed on a compact disc (CD) are the following training materials for your review.

- Facilitator Guide eCC SMS Lead Agent Training
- Facilitator Guide eCC SMS Agent Training
- PowerPoint eCC SMS Lead Agent Training
- PowerPoint eCC SMS Agent Training

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

Sincerely,

Shannon R. Richardson
(A) Director
Contract Administration (APWU)

Enclosures

(CA2020-46)

LABOR RELATIONS

UNITED STATES
POSTAL SERVICE

April 12, 2021

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

Certified Mail Tracking Number:
7019 2280 0001 6260 4448

Dear Brian:

This is in further reference to the Postal Service's previous notices regarding the proof of concept making available to customers the option to communicate with Customer Care Agents through text messaging. The most recent notice was dated January 14 (enclosed).

The Enterprise Customer Care (eCC) Short Message Service (SMS) proof of concept testing, which began the week of September 29, 2020, in Wichita, Kansas, will be extended through June 2021.

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

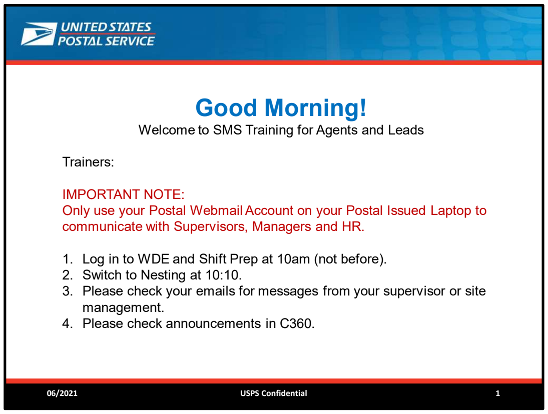
Sincerely,

Shannon R. Richardson
(A) Manager
Contract Administration (APWU)

Enclosure

475 L'ENFANT PLAZA SW
WASHINGTON DC 20260-4100
WWW.USPS.COM

(CA2020-46)



UNITED STATES POSTAL SERVICE

Good Morning!

Welcome to SMS Training for Agents and Leads

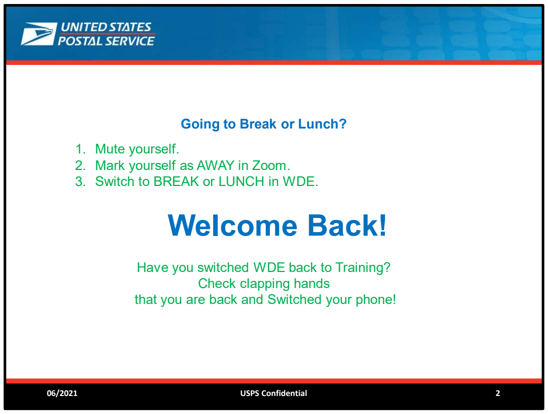
Trainers:

IMPORTANT NOTE:
Only use your Postal Webmail Account on your Postal Issued Laptop to communicate with Supervisors, Managers and HR.

1. Log in to WDE and Shift Prep at 10am (not before).
2. Switch to Nesting at 10:10.
3. Please check your emails for messages from your supervisor or site management.
4. Please check announcements in C360.

06/2021 USPS Confidential 1

AM message



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Going to Break or Lunch?

1. Mute yourself.
2. Mark yourself as AWAY in Zoom.
3. Switch to BREAK or LUNCH in WDE.

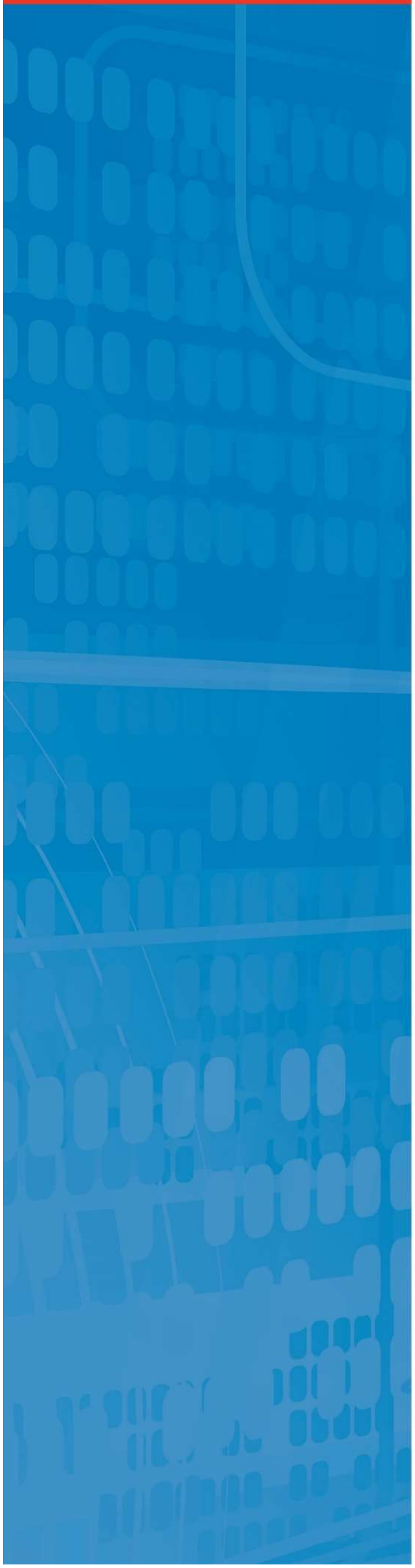
Welcome Back!

Have you switched WDE back to Training?
Check clapping hands
that you are back and Switched your phone!

06/2021 USPS Confidential 2

Break and lunch message.

2021



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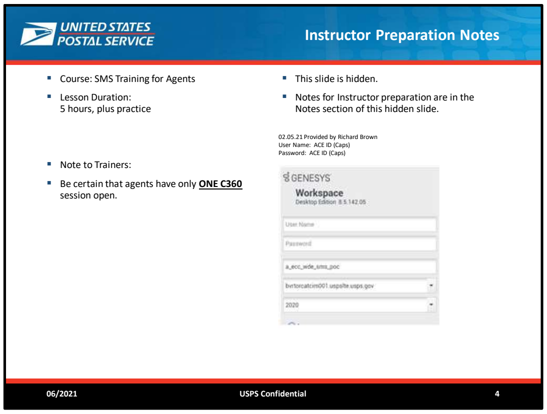
POSTAL SERVICE
Customer Care Center

SMS Training for Agents

FACILITATOR GUIDE
Courseware Version Date: 06/2021



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Instructor Preparation Notes

- Course: SMS Training for Agents
- Lesson Duration:
  5 hours, plus practice
- Note to Trainers:
- Be certain that agents have only **ONE C360** session open.

- This slide is hidden.
- Notes for Instructor preparation are in the Notes section of this hidden slide.

02.05.21 Provided by Richard Brown
User Name: ACE ID (Caps)
Password: ACE ID (Caps)

a_ecc_wde_sms_poc
bvrtorcatcim001.uspslte.usps.gov
2020

06/2021 USPS Confidential 4

Instructor Materials

- Zoom
- Supplemental training
    - VILT_Orientation_Experienced_Agents.pptx (Slide 3)
- Video file
    - Handling An Incoming Interaction [2:36] (Slide 15)
    - Handling an SMS Interaction [8:11] (Slide 18)
    - Customer Name Prepopulates [.39] (Slide 28)
    - Agent Handling Multiple Interaction [22] (Slide 60)
    - SMS - Tab Rollover [.31] (Slide 83)
    - SMS Response Sources [.35] (Slide 84)
    - SMS - Copying Information from C360 Tracking into SMS Message [.49] (Slide 85)

System Requirements

Zoom
C360

WDE SMS CAT environment (Slide 90)

Evaluation

- This course does not have an evaluation.

Unique Considerations for This Course

For this course in particular, be sure to keep the following in mind:

- The intended audience for this course includes all call center SMS Agents, Lead Agents, Quality Analysts, and Supervisors.
- Lead Agents and Supervisors have supplemental courses that will be completed after this course.
- Quality Analysts will NOT be completing a specialized SMS training. Anything Quality-specific regarding tools or processes will be trained or dealt with by Quality leadership.
- This course assumes that the Agents are experienced in Tier 1 calls and situations.
- Trainees must have two screens (laptop screen + external monitor). Monitor must have been tested and verified to be working prior to training.

- Trainees must also have external keyboard and mouse.
- Trainees will NOT have individual logins to the CAT/Training environment.
- This course includes an extended practice session that will be facilitated in a “fishbowl” fashion. Trainees will remotely control the trainer’s computer that will be logged into the SMS CAT environment. See the practice slide at the end of the course for details.
- Following practice will be live interactions with support.
    - Day 1 (Mon) – classroom/virtual instruction
    - Day 2 (Tues) – simulated practice
    - Day 3 (Weds) – ½ day of live interactions in the morning, then ½ day of classroom instruction to debrief the live interactions.
    - Days 4 and 5 – live interactions with support “nesting”
- When you’re leading practice at the end of the course, use the special SMS IVR bypass phone number (503.549.8036) to speed the process. As of this writing, that number was correct. Be sure to test it prior to the start of class. Reach out to the IT team for a replacement phone number, if necessary.

Confidential Information

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VILT Orientation
VILT Orientation
06/2021
USPS Confidential
5

Lesson Duration About 5 hours, plus practice
Slide Duration: 60 minutes

Do

Welcome the Agents to the course.
Explain that before we get into the SMS training, we'll do an orientation to Virtual Instructor Led Training.
Open and present the companion presentation called "Orientation for Virtual Instructor Led Training (VILT)."
When you're finished, return to this presentation.

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Learning Objectives

After completing this training, you will be able to:

- Sign into SMS WDE
- Select SMS WDE Standard messaging
- Understand how SMS and C360 are linked
- Use SMS WDE tools and C360 to assist up to three customers at a time according to the SMS QSDD Guidelines
- Select Disposition Codes in SMS interactions
- Access Lead Assist and Escalate to Leads

SMS Training

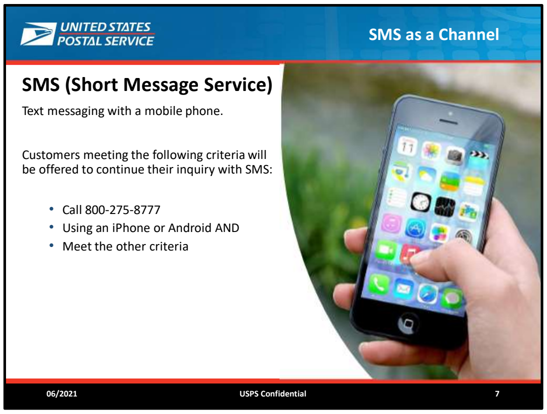
For Agents

06/2021 USPS Confidential 6

Slide Duration: 3 minutes

Do
Read the learning objectives on the slide.

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



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SMS as a Channel

SMS (Short Message Service)

Text messaging with a mobile phone.

Customers meeting the following criteria will be offered to continue their inquiry with SMS:

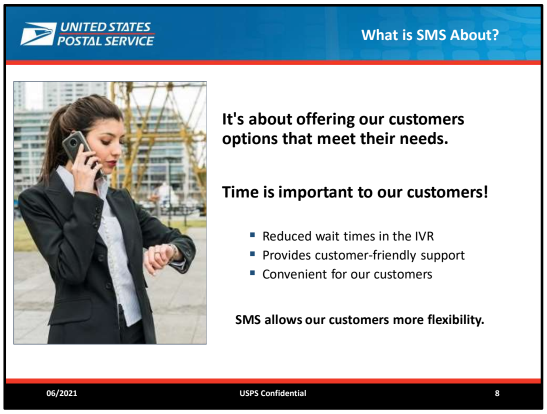
- Call 800-275-8777
- Using an iPhone or Android AND
- Meet the other criteria

06/2021 USPS Confidential 7

Slide Duration: 2 minutes

Do

Provide an introduction to SMS as a Channel by reading the text on the slide.



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What is SMS About?

It's about offering our customers options that meet their needs.

Time is important to our customers!

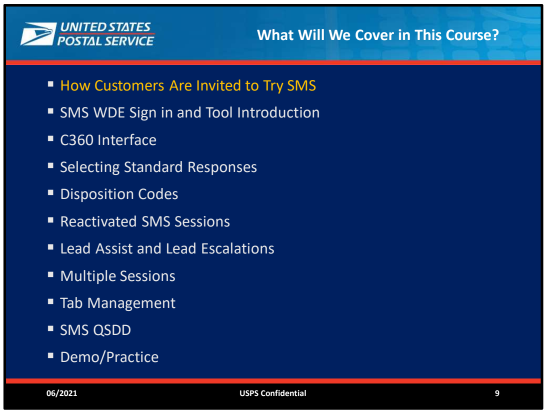
- Reduced wait times in the IVR
- Provides customer-friendly support
- Convenient for our customers

SMS allows our customers more flexibility.

06/2021 USPS Confidential 8

Slide Duration: 2 minutes
2 animations

Do
Read the text on the slide.



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What Will We Cover in This Course?

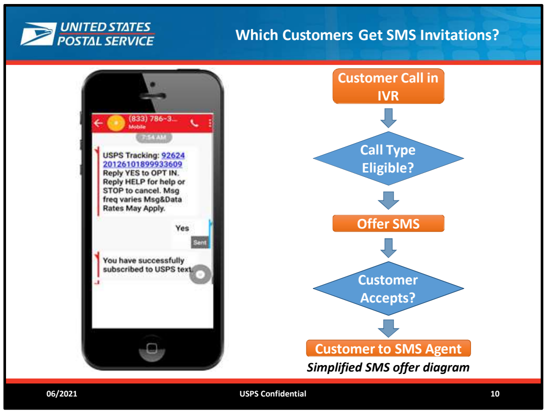
- How Customers Are Invited to Try SMS
- SMS WDE Sign in and Tool Introduction
- C360 Interface
- Selecting Standard Responses
- Disposition Codes
- Reactivated SMS Sessions
- Lead Assist and Lead Escalations
- Multiple Sessions
- Tab Management
- SMS QSDD
- Demo/Practice

06/2021 USPS Confidential 9

Slide Duration: 1 minute

Do

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



Which Customers Get SMS Invitations?

USPS Tracking: 92624 20126101899933609 Reply YES to OPT IN. Reply HELP for help or STOP to cancel. Msg freq varies Msg&Data Rates May Apply.

Yes

You have successfully subscribed to USPS text

Customer Call in IVR

Call Type Eligible?

Offer SMS

Customer Accepts?

Customer to SMS Agent

Simplified SMS offer diagram

06/2021 USPS Confidential 10

Slide Duration: 2 minutes

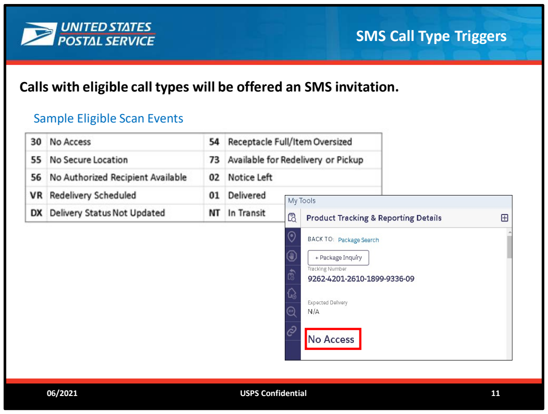
Say

In order for a customer to receive an invitation to try the SMS feature,

- must be using a smartphone, such as an Android or iPhone.
- that Call Type must eligible to receive an offer.

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

You may have customers ready immediately, or you may have to wait a few moments for an interaction to appear.



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SMS Call Type Triggers

Calls with eligible call types will be offered an SMS invitation.

Sample Eligible Scan Events

30	No Access	54	Receptacle Full/Item Oversized
55	No Secure Location	73	Available for Redelivery or Pickup
56	No Authorized Recipient Available	02	Notice Left
VR	Redelivery Scheduled	01	Delivered
DX	Delivery Status Not Updated	NT	In Transit

My Tools
Product Tracking & Reporting Details
BACK TO: Package Search
+ Package Inquiry

Tracking Number
9262-4201-2610-1899-9336-09

Expected Delivery
N/A

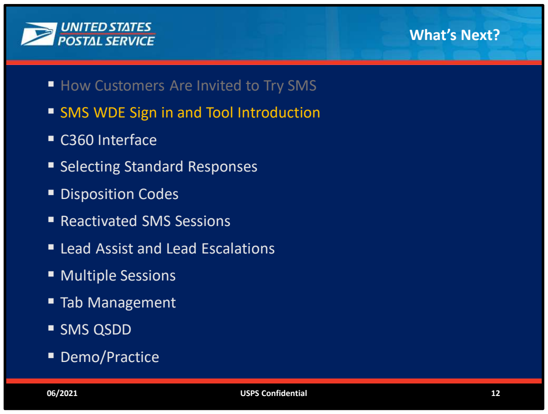
No Access

06/2021 USPS Confidential 11

Slide Duration: 3 minutes

Do

Explain that when a call enters the IVR, the customer chooses an eligible call type, and if the customer is using a smartphone, they will be offered an SMS invitation.



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What's Next?

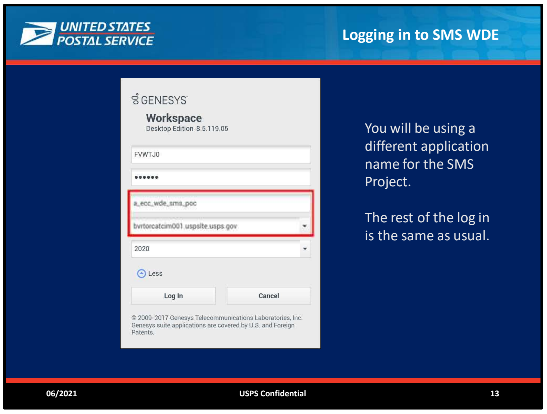
- How Customers Are Invited to Try SMS
- SMS WDE Sign in and Tool Introduction
- C360 Interface
- Selecting Standard Responses
- Disposition Codes
- Reactivated SMS Sessions
- Lead Assist and Lead Escalations
- Multiple Sessions
- Tab Management
- SMS QSDD
- Demo/Practice

06/2021 USPS Confidential 12

Slide Duration: 1 minute

Do

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



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Logging in to SMS WDE

GENESYS
Workspace
Desktop Edition 8.5.119.05

FVWTJ0

••••••

a_ecc_wde_sms_poc

bvrtorcatcim001.uspslte.usps.gov

2020

Less
Log In
Cancel
© 2009-2017 Genesys Telecommunications Laboratories, Inc. Genesys suite applications are covered by U.S. and Foreign Patents.

You will be using a different application name for the SMS Project.

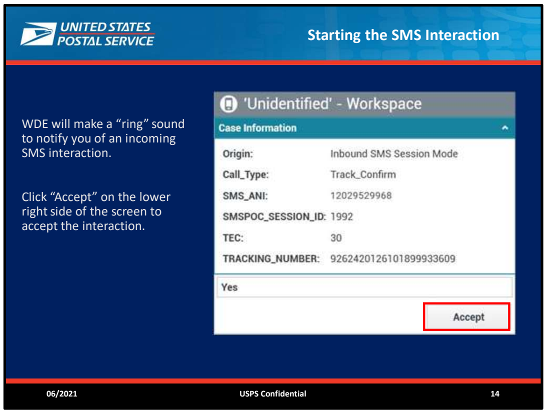
The rest of the log in is the same as usual.

06/2021 USPS Confidential 13

Slide Duration: 1 minute

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

In each case, we’ll share the actual login details later, if you need them. IT might make the changes for you automatically.



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Starting the SMS Interaction

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

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

'Unidentified' - Workspace
Case Information

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

Yes

Accept

06/2021
USPS Confidential
14

Slide Duration: 1 minute

Say

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

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

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Video: Handling Incoming Interaction

ECC

SMS - Handling an Incoming Interaction

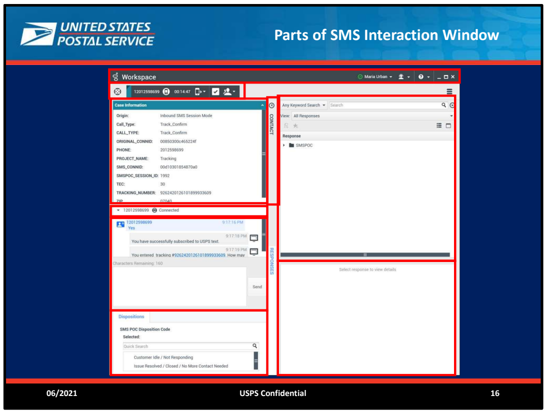
06/2021 USPS Confidential 15

Slide Duration: 5 minutes

Instructor Note: This video demonstrates an Agent handling a new interaction – in actual speed **and** in slow motion. It shows closing an interaction, accepting a new interaction, using sticky notes to copy and paste responses, and copying the customer's name into the WDE Contact field. The goal of this video is to set the context; more detailed content and videos will be shown later in the training.

Do

Click to play the video. (Duration: 2 minutes, 36 seconds)



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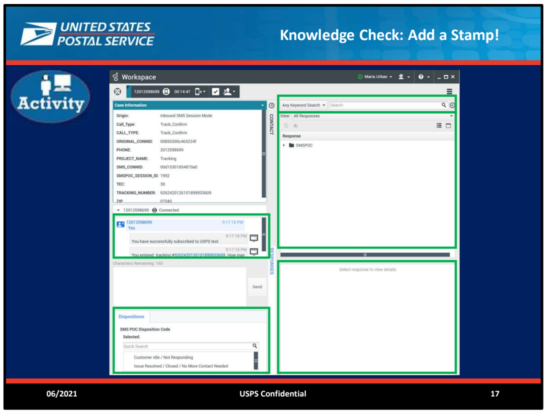
Parts of SMS Interaction Window

06/2021 USPS Confidential 16

Slide Duration: 5 minutes
8 animations

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

1. WDE statuses, Ready, Not Ready and Log Out.
2. WDE Interaction Toolbar. The customer's cell phone number, the call timer, and the buttons for "Done", "Assist queue", and "SMS Transfers" are in this toolbar. This tool defaults to the customers phone number. Later, we will show you how to add the customer's name.
3. The Case Information panel has the CTI pulled in from the IVR. Origin: Inbound SMS, call Type, Phone number, Tracking number (if applicable), and the Zip Code.
4. Call status: Connected
5. Active SMS Responses and message edit panel. Customer Responses in Active SMS Responses are blue text and have a unique icon. Agent responses are gray text and have an icon of a person in a headset (not pictured here). System messages are also in gray and have a monitor icon next to them. Point to **TIME STAMPS** on right of responses. Warn that Agents are NOT to click on any URLs provided by the customer. Also, Agents should avoid clicking on any other blue text in the Active SMS Responses Pane. They may open unwanted windows or actually call the customer.
6. Disposition panel.
7. Available Standard Responses. This is a pick list of prepared responses to send to the customer. The folder had a drop down where other folders are located for Standard Responses. Agents can use the Search bar to enter a Key word to search for Standard Responses.
8. Preview box. When a response is selected the Response will be previewed in this box. Here you can read the entire standard message before moving to the send box where it can be edited.
9. Contact bar. When selected, will open the tool to enter the customer's name which will show in place of the phone number.


UNITED STATES POSTAL SERVICE
Activity
Workspace
Maria Urban
12012598699 00:14:47
CONTACT
RESPONSES
Any Keyword Search
Search
View: All Responses
Response
SMSPOC
Select response to view details
Send
Dispositions
Quick Search

Knowledge Check: Add a Stamp!

Case Information

Origin: Inbound SMS Session Mode
Call_Type: Track_Confirm
CALL_TYPE: Track_Confirm
ORIGINAL_CONNID: 00850300c465224f
PHONE: 2012598699
PROJECT_NAME: Tracking
SMS_CONNID: 00d10301854870a0
SMSPOC_SESSION_ID: 1992
TEC: 30
TRACKING_NUMBER: 9262420126101899933609
ZIP: 07040

12012598699 Connected

12012598699 9:17:16 PM
Yes

9:17:18 PM
You have successfully subscribed to USPS text.

9:17:19 PM
You entered tracking #9262420126101899933609. How may

Characters Remaining: 160

SMS POC Disposition Code
Selected:
Customer Idle / Not Responding
Issue Resolved / Closed / No More Contact Needed

06/2021 USPS Confidential 17

Slide Duration: 4 minutes
5 animations

Do
Direct the Agents to use the Stamp Annotate Tool to select their answers to the questions below. Be sure to clear the Agent's annotations before starting the next question. The correct answer highlights will disappear on their own after two seconds.

Q1: Where will the pick list for Standard Responses be located?
Direct Agents to place a Zoom Annotation stamp.
Click to animate the answer. Highlight will disappear on its own after two seconds.

Q2: Where are the time stamps located?
Direct Agents to place a Zoom Annotation stamp
Click to animate the answer. Highlight will disappear on its own after two seconds.

Q3: Where can Agents search for Standard Responses?
Direct Agents to place a Zoom Annotation stamp
Click to animate the answer. Highlight will disappear on its own after two seconds.

Q4: Where are the Disposition Codes?
Direct Agents to place a Zoom Annotation stamp
Click to animate the answer. Highlight will disappear on its own after two seconds.

Q5: Where can Agents preview the selected Standard Response?
Direct Agents to place a Zoom Annotation stamp
Click to animate the answer. Highlight will disappear on its own after two seconds.

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Video: Handling An SMS Interaction

Video
ECC
Knowledge Nudge
Handling An SMS Interaction

06/2021 USPS Confidential 18

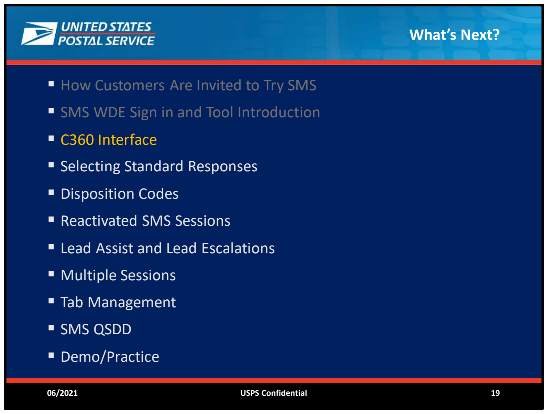
Slide Duration: 10 minutes

Say
Let's see what an SMS interaction looks like from start to finish.

Do
Play the video. (8:11)

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

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



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What's Next?

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- Multiple Sessions
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- SMS QSDD
- Demo/Practice

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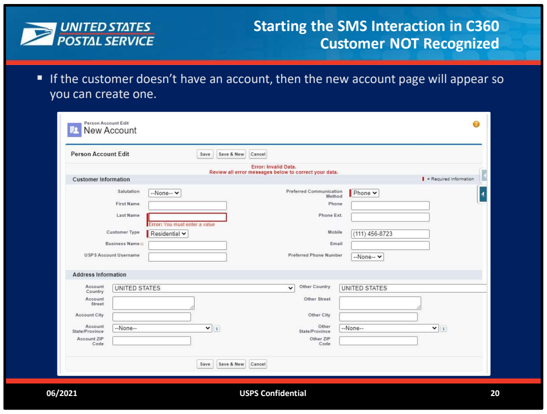
Slide Duration: 1 minute

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



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Starting the SMS Interaction in C360
Customer NOT Recognized

- If the customer doesn't have an account, then the new account page will appear so you can create one.

Person Account Edit

New Account

Person Account Edit

Error: Invalid Data.
Review all error messages below to correct your data.

Customer Information

Salutation: --None--

Last Name: Error: You must enter a value

Customer Type: Residential

Preferred Communication Method: Phone

Mobile: (111) 456-8723

Preferred Phone Number: --None--

Address Information

Account Country: UNITED STATES

Account State/Province: --None--

Other Country: UNITED STATES

Other State/Province: --None--

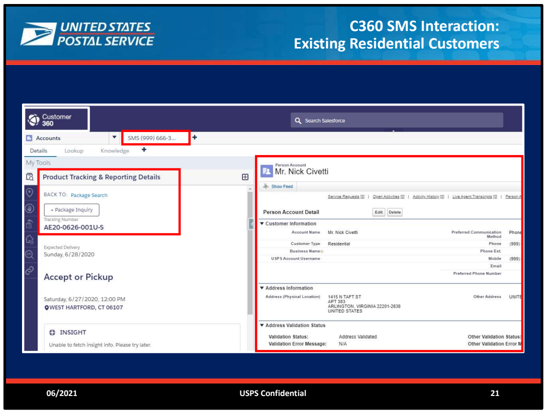
Save
Save & New
Cancel
= Required Information
First Name
Business Name
USPS Account Username
Phone
Phone Ext.
Email
Account Street
Account City
Account ZIP Code
Other Street
Other City
Other ZIP Code
Save
Save & New
Cancel

06/2021 USPS Confidential 20

Slide Duration: 1 minute

Do

Explain that if the customer DOES NOT already have a C360 person account, you'll need to create one. Explain that even though it's not shown here, if applicable, the customer's tracking number and its tracking details will already appear in the left side of the screen.



C360 SMS Interaction:
Existing Residential Customers

UNITED STATES
POSTAL SERVICE
Customer 360
Search Salesforce
Accounts
SMS (999) 666-3...
Details
Lookup
Knowledge
My Tools
Product Tracking & Reporting Details
BACK TO: Package Search
+ Package Inquiry
Show Feed
Service Requests [0]
Open Activities [0]
Activity History [0]
Live Agent Transcripts [0]
Edit
Delete
INSIGHT

Tracking Number: AE20-0626-001U-S

Expected Delivery: Sunday, 6/28/2020

Accept or Pickup

Saturday, 6/27/2020, 12:00 PM
WEST HARTFORD, CT 06107

Unable to fetch insight info. Please try later.

Person Account: Mr. Nick Civetti

Person Account Detail

Customer Information

Account Name: Mr. Nick Civetti

Customer Type: Residential

Address Information

Address (Physical Location): 1415 N TAFT ST
APT 383
ARLINGTON, VIRGINIA 22201-2638
UNITED STATES

Address Validation Status

Validation Status: Address Validated

Validation Error Message: N/A

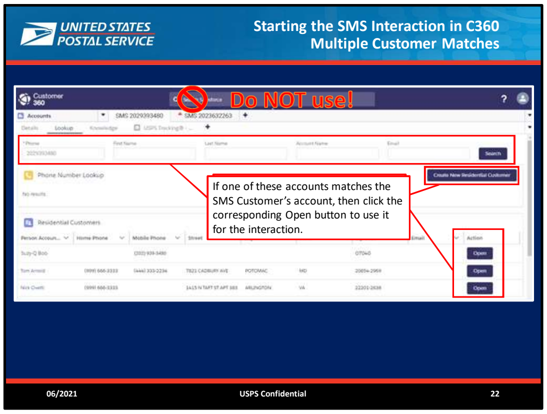
06/2021 USPS Confidential 21

Slide Duration: 1 minute

Say

The Primary Tab in C360 for an SMS Interaction will show “SMS” and then the phone number of the interaction.

- If the customer already has an account in C360 and the system recognized it, it will appear automatically.
- If the customer already entered their tracking number in the IVR, the PTR tracking details will already appear.



Starting the SMS Interaction in C360
Multiple Customer Matches

If one of these accounts matches the SMS Customer’s account, then click the corresponding Open button to use it for the interaction.

06/2021 USPS Confidential 22

UNITED STATES POSTAL SERVICE
Customer 360
Do NOT use!
Search
Create New Residential Customer
Phone Number Lookup
Residential Customers
Action
Open
Open
Open

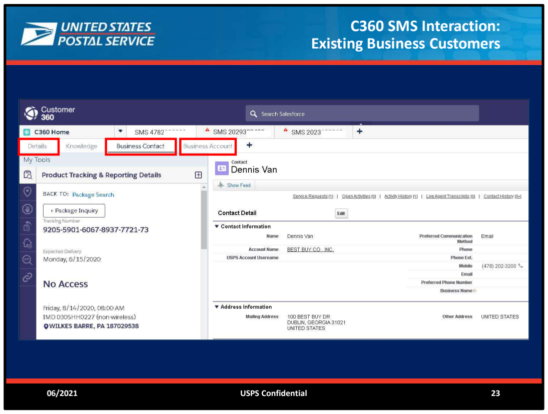
Slide Duration: 2 minutes
3 animations

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

Explain that if none of the accounts here match, Agents should use the fields on the top of the details sub-tab and the “Search” button to search for the correct account.

Explain that if the customer needs a new account, Agents should use this “Create New Residential Customer” button to make a new C360 account. From “Create New Residential Customer” you can create a new Person Business Account as well. Also note, that if you are working with a Managed Business Account, you may need to add a new Business Contact.

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


UNITED STATES POSTAL SERVICE
Customer 360
Search Salesforce
C360 Home
SMS 4782
SMS 20293
SMS 2023
Details
Knowledge
Business Contact
Business Account
My Tools
Product Tracking & Reporting Details
+ Package Inquiry
Show Feed
Service Requests [1] | Open Activities [0] | Activity History [1] | Live Agent Transcripts [0] | Contact History [5+]
Edit

C360 SMS Interaction: Existing Business Customers

BACK TO: Package Search

Tracking Number
9205-5901-6067-8937-7721-73

Expected Delivery
Monday, 6/15/2020

No Access

Friday, 8/14/2020, 08:00 AM
IMD 030SHH0227 (non-wireless)
WILKES BARRE, PA 187029538

Contact
Dennis Van

Contact Detail

Contact Information

Name: Dennis Van
Account Name: BEST BUY CO., INC.
USPS Account Username:
Preferred Communication Method: Email
Phone:
Phone Ext.:
Mobile: (478) 202-3200
Email:
Preferred Phone Number:
Business Name:

Address Information

Mailing Address: 100 BEST BUY DR
DUBLIN, GEORGIA 31021
UNITED STATES
Other Address: UNITED STATES

06/2021 USPS Confidential 23

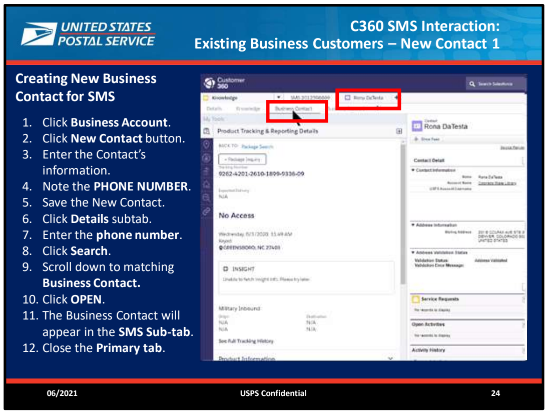
Slide Duration: 1 minute

Do

Emphasize that this looks similar to the Residential accounts.

Point out that “Business Contact” and “Business Account” appear in sub tabs.

When a Business account enters the SMS.
Do not click Contacts within the Business accounts.
Click on Details sub tab.
Enter the phone number in the search bar.
Click Search.
Scroll down to select the Business Contact.
Click Open.



UNITED STATES POSTAL SERVICE

C360 SMS Interaction:
Existing Business Customers – New Contact 1

Creating New Business Contact for SMS

1. Click **Business Account**.
2. Click **New Contact** button.
3. Enter the Contact's information.
4. Note the **PHONE NUMBER**.
5. Save the New Contact.
6. Click **Details** subtab.
7. Enter the **phone number**.
8. Click **Search**.
9. Scroll down to matching **Business Contact.**
10. Click **OPEN**.
11. The Business Contact will appear in the **SMS Sub-tab**.
12. Close the **Primary tab**.

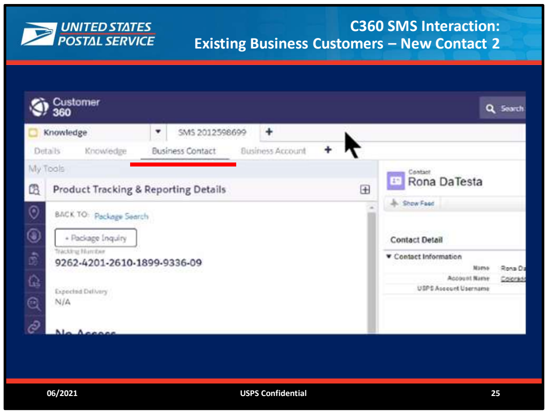
Customer 360
Knowledge
Product Tracking & Reporting Details
9262-4201-2610-1899-9336-09
No Access
INSIGHT
Rona DaTesta
Contact Detail
Service Requests
Open Activities
Activity History

06/2021 USPS Confidential 24

Slide Duration: 8 minutes
12 animations (one for each step shown on screen.)

Say
In order for the SMS interaction to save properly in C360, we must create new contacts in existing Business Accounts correctly.
This is a situation where the business exists and has existing Contacts. Now we have a new person on the phone.
We must create a New Contact for them that is associated with the existing Business Account.
You will follow the same steps that is used today in C360 Existing Business Accounts.

These are the steps to create a New Contact in the so that the interaction is saved and available under the primary SMS tab.

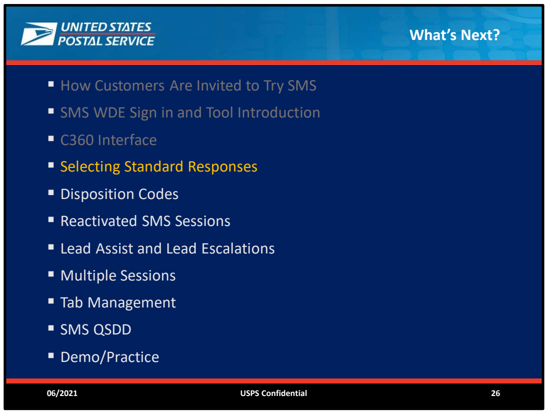

UNITED STATES
POSTAL SERVICE
Customer 360
Search
Knowledge
SMS 2012598699
Details
Knowledge
Business Contact
Business Account
My Tools
Product Tracking & Reporting Details
BACK TO: Package Search
+ Package Inquiry
Tracking Number
9262-4201-2610-1899-9336-09
Expected Delivery
N/A
Contact
Rona DaTesta
Show Feed
Contact Detail
Contact Information
Name
Account Name
USPS Account Username

C360 SMS Interaction:
Existing Business Customers – New Contact 2

06/2021 USPS Confidential 25

Slide Duration: 1 minute

Say
Now the new business contact appears under the SMS primary tab. When you finish the SMS interaction, it will be saved correctly in C360.



UNITED STATES POSTAL SERVICE

What's Next?

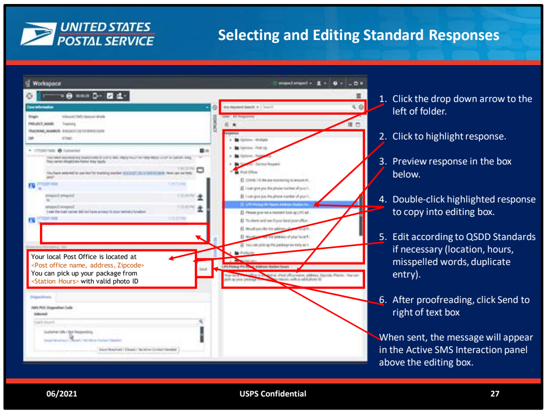
- How Customers Are Invited to Try SMS
- SMS WDE Sign in and Tool Introduction
- C360 Interface
- Selecting Standard Responses
- Disposition Codes
- Reactivated SMS Sessions
- Lead Assist and Lead Escalations
- Multiple Sessions
- Tab Management
- SMS QSDD
- Demo/Practice

06/2021 USPS Confidential 26

Slide Duration: 1 minute

Do

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



UNITED STATES POSTAL SERVICE

Selecting and Editing Standard Responses

Your local Post Office is located at
<Post office name, address, Zipcode>
You can pick up your package from
<Station Hours> with valid photo ID

1. Click the drop down arrow to the left of folder.
2. Click to highlight response.
3. Preview response in the box below.
4. Double-click highlighted response to copy into editing box.
5. Edit according to QSDD Standards if necessary (location, hours, misspelled words, duplicate entry).
6. After proofreading, click Send to right of text box

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

06/2021 USPS Confidential 27

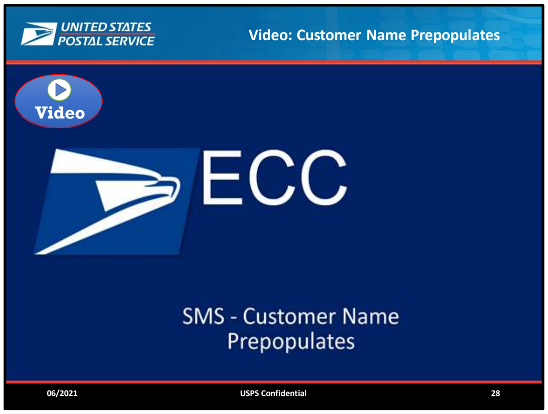
Slide Duration: 5 minutes
8 animations

Do
Read the text on the slide. Click before reading each bullet to show highlights. Previous highlights will disappear as the next one appears.
When you get to point 4, share that Agents can select multiple messages to “stack” them, so long as they don’t go over the 160 character limit.
When you get to point 5, point out that spelling errors will be indicated by a red wavy line. Agents can right-click on the misspelling and choose the correct spelling.

Explain that there are many Standard Responses, organized into folders. Remind Agents that its very important to use the search feature to help find the right standard response.

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

Explain that if Agents can’t find a Standard Response that fits the situation, they can type a non-standard response.


Video: Customer Name Prepopulates

Video

ECC

SMS - Customer Name Prepopulates

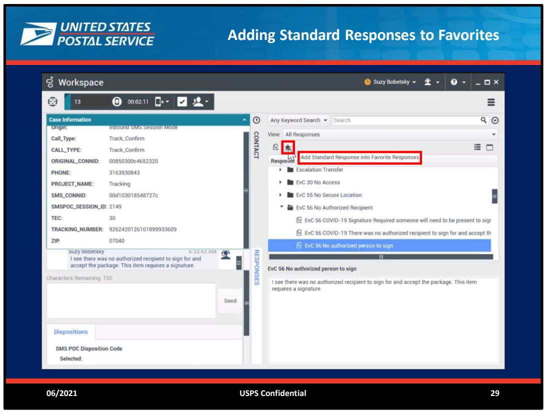
06/2021 USPS Confidential 28

Slide Duration: 1 minute

Instructor Note: This video demonstrates the customer’s name automatically populating in a standard message.

Do

Click to play the video. (Duration: 39 seconds)



UNITED STATES POSTAL SERVICE

Adding Standard Responses to Favorites

Workspace
Suzy Bobetsky
13
00:02:11
Case Information
CONTACT
RESPONSES
Any Keyword Search
Search
Add Standard Response into Favorite Responses
Responses
Escalation Transfer
EvC 30 No Access
EvC 55 No Secure Location
EvC 56 No Authorized Recipient
EvC 56 COVID-19 Signature Required someone will need to be present to sigr
EvC 56 COVID-19 There was no authorized recipient to sign for and accept th
EvC 56 No authorized person to sign
Characters Remaining: 160
Send
Dispositions

Origin: Inbound SMS Session Mode
Call_Type: Track_Confirm
CALL_TYPE: Track_Confirm
ORIGINAL_CONNID: 00850300c4652320
PHONE: 3163930843
PROJECT_NAME: Tracking
SMS_CONNID: 00d103018548727c
SMSPOC_SESSION_ID: 2149
TEC: 30
TRACKING_NUMBER: 9262420126101899933609
ZIP: 07040

Suzy Bobetsky 6:33:43 AM
I see there was no authorized recipient to sign for and accept the package. This item requires a signature.

View: All Responses

EvC 56 No authorized person to sign

I see there was no authorized recipient to sign for and accept the package. This item requires a signature.

SMS POC Disposition Code
Selected:

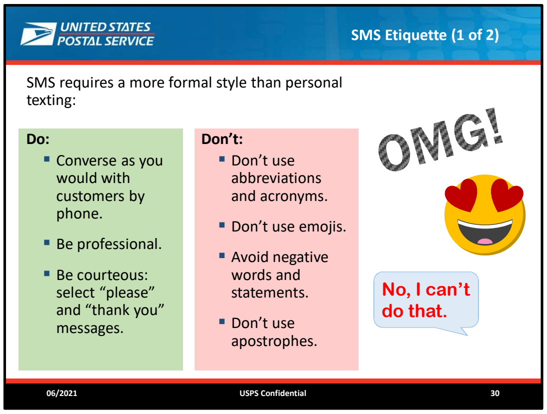
06/2021 USPS Confidential 29

Slide Duration: 4 minutes
2 animations

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

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

Facilitator’s Note: Favorites do not save after the Agent signs out for the day.



UNITED STATES POSTAL SERVICE

SMS Etiquette (1 of 2)

SMS requires a more formal style than personal texting:

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

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

OMG!

No, I can't do that.

06/2021 USPS Confidential 30

Slide Duration: 2 minutes

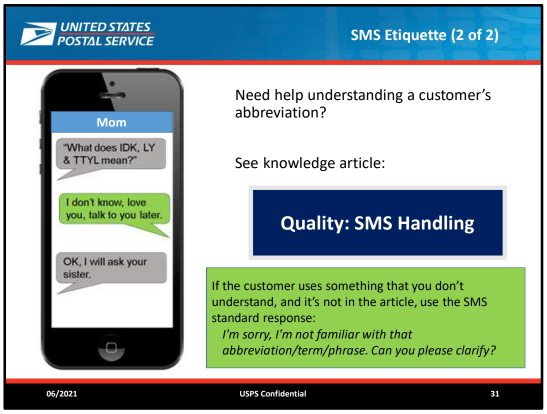
Trainer Note: Customers will send pictures and emoji's; Agents can see emoji's but they cannot see pictures or images.

Say

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

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

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



UNITED STATES POSTAL SERVICE

SMS Etiquette (2 of 2)

Mom

"What does IDK, LY & TTYL mean?"

I don't know, love you, talk to you later.

OK, I will ask your sister.

Need help understanding a customer's abbreviation?

See knowledge article:

Quality: SMS Handling

If the customer uses something that you don't understand, and it's not in the article, use the SMS standard response:

I'm sorry, I'm not familiar with that abbreviation/term/phrase. Can you please clarify?

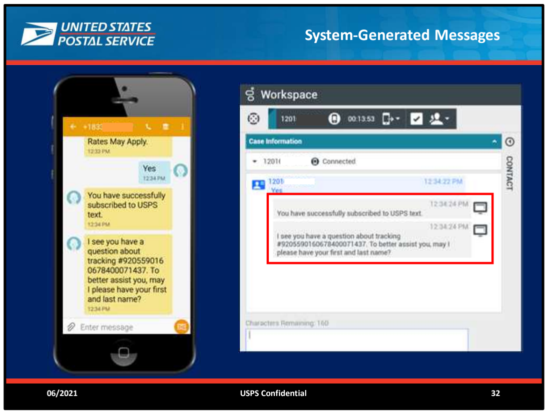
06/2021 USPS Confidential 31

Slide Duration: 5 minutes

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

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

Do
Read the text in the green box.
Explain that if the article doesn't have an abbreviation definition, let your supervisor know so we can get it added to the article.



System-Generated Messages

UNITED STATES POSTAL SERVICE

+1833[redacted]

Rates May Apply.
12:33 PM

Yes
12:34 PM

You have successfully subscribed to USPS text.
12:34 PM

I see you have a question about tracking #9205590160678400071437. To better assist you, may I please have your first and last name?
12:34 PM

Enter message

Workspace

1201
00:13:53
Case Information
CONTACT

1201(Connected

1201[redacted] 12:34:22 PM
Yes

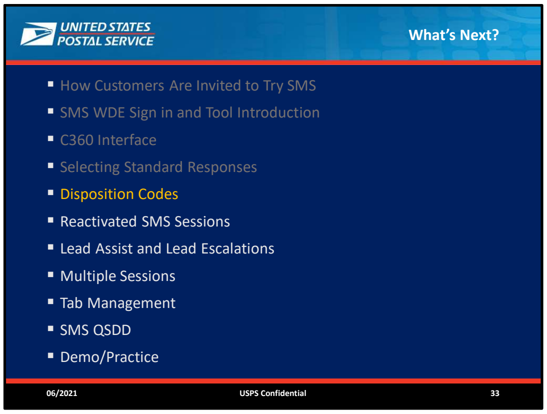
12:34:24 PM
You have successfully subscribed to USPS text.

12:34:24 PM
I see you have a question about tracking #9205590160678400071437. To better assist you, may I please have your first and last name?

Characters Remaining: 160

Slide Duration: 1 minute

Do
Review the slide.



UNITED STATES POSTAL SERVICE

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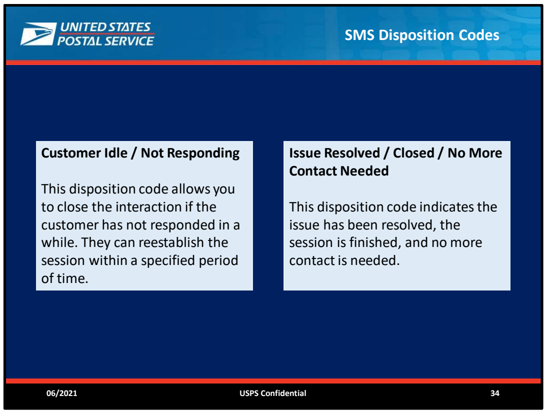
- Multiple Sessions
- Tab Management
- SMS QSDD
- Demo/Practice

06/2021 USPS Confidential 33

Slide Duration: 1 minute

Do

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



UNITED STATES POSTAL SERVICE

SMS Disposition Codes

Customer Idle / Not Responding

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

Issue Resolved / Closed / No More Contact Needed

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

06/2021 USPS Confidential 34

Slide Duration: 2 minutes

Say

There are two disposition codes:

- Customer Idle / Not Responding
- Issue Resolved / Closed / No More Contact Needed

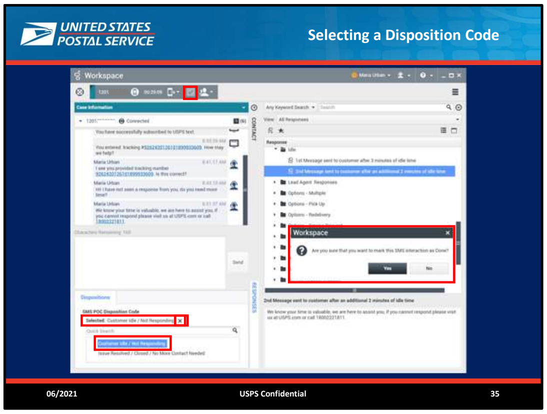
Do

Read the text boxes on the slide.

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

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

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



UNITED STATES POSTAL SERVICE
Selecting a Disposition Code
Workspace
Yes
No
06/2021
USPS Confidential
35

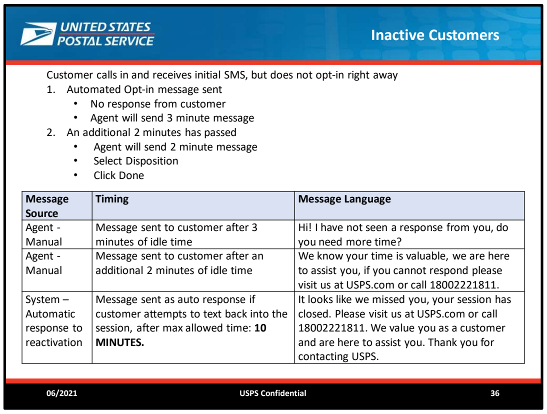
Slide Duration: 2 minutes
5 animations

Say
Dispositioning and closing an interaction is simple:

Do
Click to animate highlights as you read the bullets below. The previous highlight will disappear when the next one appears.

1. Select a disposition code by clicking on it.
2. Verify the code you selected. It will appear above Quick Search box.
3. If you selected the wrong one, you can click the “x” next to it above the Quick Search box to remove it, and select again.
4. When you’re sure you have the right one, click the Done button in the interaction bar.
5. A confirmation message appears. Click “Yes” to confirm and close the interaction window, ending the interaction.

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



UNITED STATES POSTAL SERVICE

Inactive Customers

Customer calls in and receives initial SMS, but does not opt-in right away

1. Automated Opt-in message sent
   - No response from customer
   - Agent will send 3 minute message
2. An additional 2 minutes has passed
   - Agent will send 2 minute message
   - Select Disposition
   - Click Done

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

06/2021 USPS Confidential 36

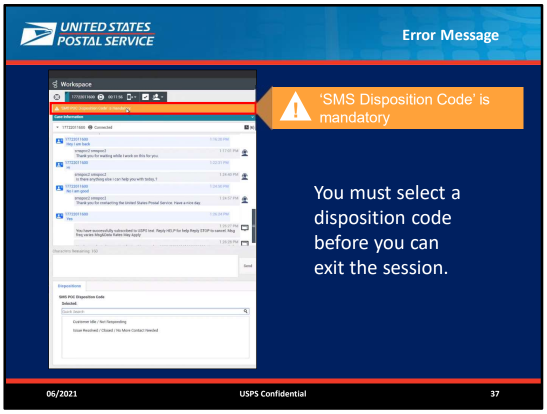
Slide Duration: 3 minutes

Do
Read the information on the screen.

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

Tell the Agents that they must select the 3 minute message and 2 minute message accordingly. After sending the second message, Agents should select the “Customer Idle/ Not Responding” disposition, and then click “Done”.

Tell the Agents that they need to use the time stamps on the customers’ messages to know when it’s time to send these “inactive customer” messages.



UNITED STATES POSTAL SERVICE

Error Message

'SMS Disposition Code' is mandatory

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

06/2021 USPS Confidential 37

Slide Duration: 1 minute

1 animation

Say

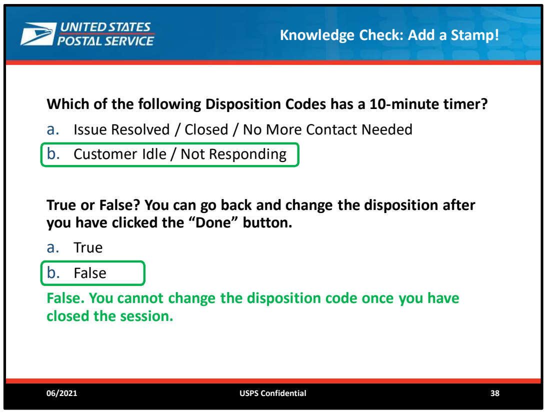
You must select a disposition code before you can exit the session. If you attempt to click the Done button without selecting a disposition code, you will get an error message.

Do

Click to display the blowup of the error message.

Say

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



UNITED STATES POSTAL SERVICE

Knowledge Check: Add a Stamp!

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

a. Issue Resolved / Closed / No More Contact Needed

[✓ b. Customer Idle / Not Responding]

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

a. True

[✓ b. False]

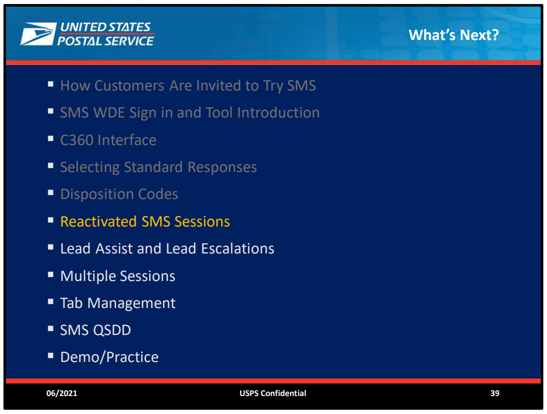
False. You cannot change the disposition code once you have closed the session.

06/2021 USPS Confidential 38

Slide Duration: 2 minutes
2 animations

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

Click to view each answer.



UNITED STATES POSTAL SERVICE

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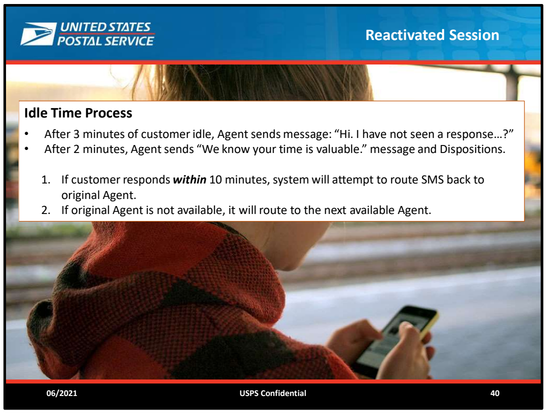
- Demo/Practice

06/2021 USPS Confidential 39

Slide Duration: 1 minute

Do

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



UNITED STATES POSTAL SERVICE

Reactivated Session

Idle Time Process

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

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

06/2021 USPS Confidential 40

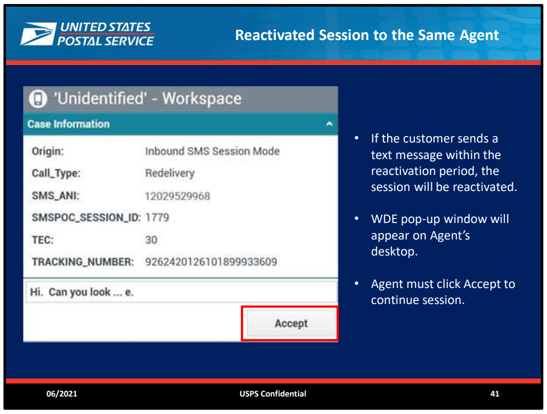
Slide Duration: 2 minutes
1 animation

Say
If a customer has been unresponsive for a certain period of time you will put them into the “idle” status.

Let’s take a look what happens after that.

Do
Click to display the rules.

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



UNITED STATES POSTAL SERVICE

Reactivated Session to the Same Agent

'Unidentified' - Workspace

Case Information

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

Hi. Can you look ... e.

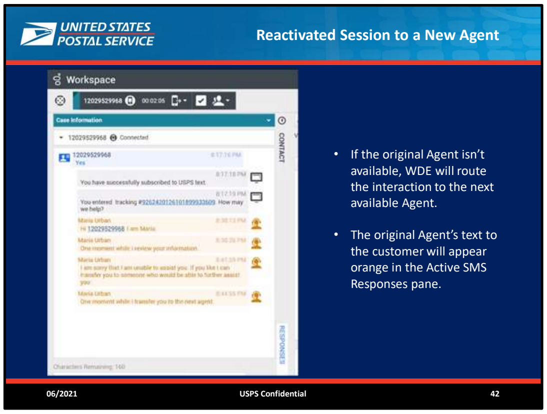
- If the customer sends a text message within the reactivation period, the session will be reactivated.
- WDE pop-up window will appear on Agent's desktop.
- Agent must click Accept to continue session.

06/2021 USPS Confidential 41

Slide Duration: 1 minute

Do

Read the bullets on the slide.



UNITED STATES POSTAL SERVICE

Reactivated Session to a New Agent

12029529968
Yes

You have successfully subscribed to USPS text.

You entered tracking #9262420126101899933609. How may we help?

Maria Urban
Hi 12029529968 I am Maria.

Maria Urban
One moment while I review your information.

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

Maria Urban
One moment while I transfer you to the next agent.

Characters Remaining: 160

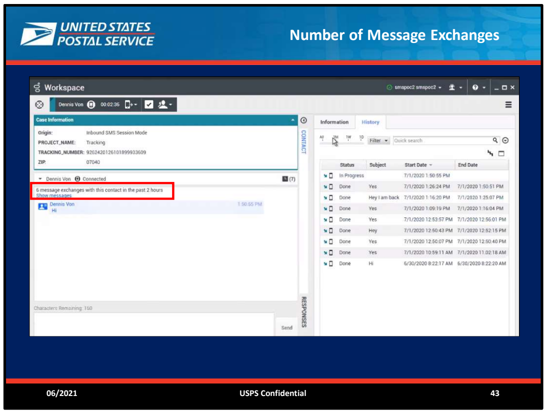
- If the original Agent isn't available, WDE will route the interaction to the next available Agent.
- The original Agent's text to the customer will appear orange in the Active SMS Responses pane.

06/2021 USPS Confidential 42

Slide Duration: 1 minute

Do
Read the bullets on the slide.

Explain that when the reactivated interaction is forwarded to the next available Agent, the original Agent's messages will appear in this orange color.



UNITED STATES POSTAL SERVICE

Number of Message Exchanges

Origin: Inbound SMS Session Mode
PROJECT_NAME: Tracking
TRACKING_NUMBER: 9262420126101899933609
ZIP: 07040

Dennis Von Connected

6 message exchanges with this contact in the past 2 hours
Show messages

Dennis Von 1:50:55 PM
Hi

Characters Remaining: 160

Status	Subject	Start Date	End Date
In Progress		7/1/2020 1:50:55 PM	
Done	Yes	7/1/2020 1:26:24 PM	7/1/2020 1:50:51 PM
Done	Hey I am back	7/1/2020 1:16:20 PM	7/1/2020 1:25:07 PM
Done	Yes	7/1/2020 1:09:19 PM	7/1/2020 1:16:04 PM
Done	Yes	7/1/2020 12:53:57 PM	7/1/2020 12:56:01 PM
Done	Hey	7/1/2020 12:50:43 PM	7/1/2020 12:52:15 PM
Done	Yes	7/1/2020 12:50:07 PM	7/1/2020 12:50:40 PM
Done	Yes	7/1/2020 10:59:11 AM	7/1/2020 11:02:18 AM
Done	Hi	6/30/2020 8:22:17 AM	6/30/2020 8:22:20 AM

06/2021 USPS Confidential 43

Slide Duration: 2 minutes

Do

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

Say

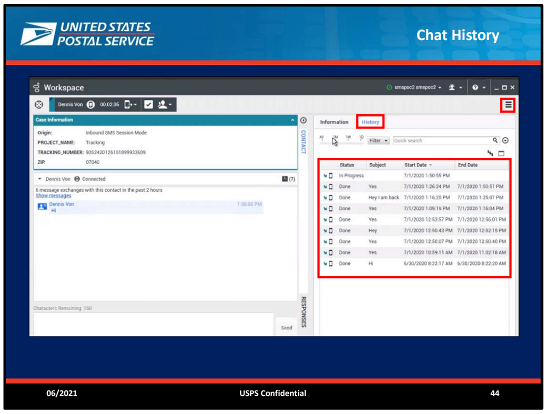
When an Agent – either a new Agent or the same Agent -- receives the reactivated interaction, the previous messages will be available, but hidden.

In the left panel, a message details the number of exchanges that occurred within the last two hours. These messages will most likely be the most important to read for a reactivated session.

Do

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

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


UNITED STATES
POSTAL SERVICE
Workspace
smspoc2 smspoc2
Dennis Von
00:02:36
CONTACT
RESPONSES
Information
History
All
1M
1W
1D
Filter
Quick search
Send

Chat History

Case Information

Origin: Inbound SMS Session Mode
PROJECT_NAME: Tracking
TRACKING_NUMBER: 9262420126101899933609
ZIP: 07040

Dennis Von Connected (7)

6 message exchanges with this contact in the past 2 hours
Show messages

Dennis Von 1:50:55 PM
Hi

Characters Remaining: 160

Status	Subject	Start Date	End Date
In Progress		7/1/2020 1:50:55 PM	
Done	Yes	7/1/2020 1:26:24 PM	7/1/2020 1:50:51 PM
Done	Hey I am back	7/1/2020 1:16:20 PM	7/1/2020 1:25:07 PM
Done	Yes	7/1/2020 1:09:19 PM	7/1/2020 1:16:04 PM
Done	Yes	7/1/2020 12:53:57 PM	7/1/2020 12:56:01 PM
Done	Hey	7/1/2020 12:50:43 PM	7/1/2020 12:52:15 PM
Done	Yes	7/1/2020 12:50:07 PM	7/1/2020 12:50:40 PM
Done	Yes	7/1/2020 10:59:11 AM	7/1/2020 11:02:18 AM
Done	Hi	6/30/2020 8:22:17 AM	6/30/2020 8:22:20 AM

06/2021 USPS Confidential 44

Slide Duration: 1 minute

Say

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

Do

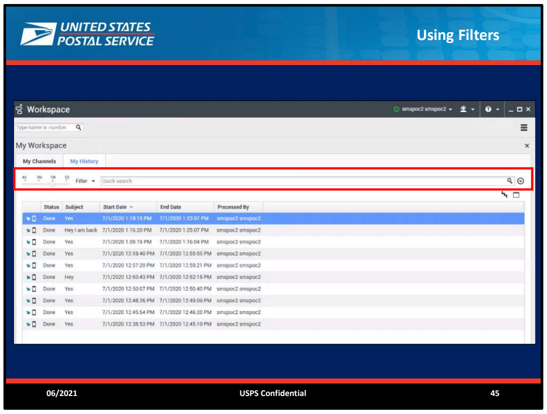
Point out that Agents can select the History by selecting the hamburger menu in the upper right.

Explain that the History tab will appear is located in the right pane.

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

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

We’ll show clicking on an item to display the transcript during the demonstration later.


UNITED STATES
POSTAL SERVICE
Workspace
smspoc2 smspoc2
Type name or number
My Workspace
My Channels
My History
All
1M
1W
1D
Filter
Quick search

Using Filters

	Status	Subject	Start Date	End Date	Processed By
	Done	Yes	7/1/2020 1:18:15 PM	7/1/2020 1:23:07 PM	smspoc2 smspoc2
	Done	Hey I am back	7/1/2020 1:16:20 PM	7/1/2020 1:25:07 PM	smspoc2 smspoc2
	Done	Yes	7/1/2020 1:09:19 PM	7/1/2020 1:16:04 PM	smspoc2 smspoc2
	Done	Yes	7/1/2020 12:59:40 PM	7/1/2020 12:59:55 PM	smspoc2 smspoc2
	Done	Yes	7/1/2020 12:57:20 PM	7/1/2020 12:59:21 PM	smspoc2 smspoc2
	Done	Hey	7/1/2020 12:50:43 PM	7/1/2020 12:52:15 PM	smspoc2 smspoc2
	Done	Yes	7/1/2020 12:50:07 PM	7/1/2020 12:50:40 PM	smspoc2 smspoc2
	Done	Yes	7/1/2020 12:48:36 PM	7/1/2020 12:49:06 PM	smspoc2 smspoc2
	Done	Yes	7/1/2020 12:45:54 PM	7/1/2020 12:46:20 PM	smspoc2 smspoc2
	Done	Yes	7/1/2020 12:38:53 PM	7/1/2020 12:45:10 PM	smspoc2 smspoc2

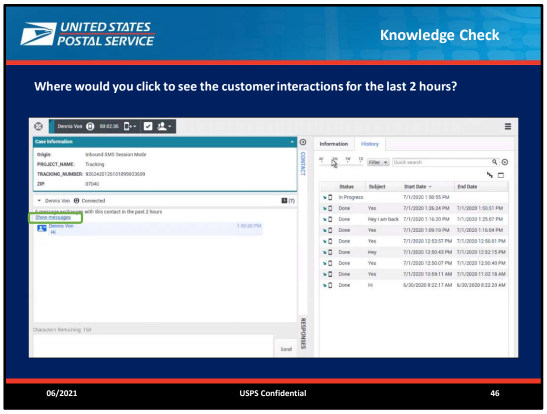
06/2021 USPS Confidential 45

Slide Duration: 1 minute

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

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

Explain that we'll show this during the demonstration later.



UNITED STATES
POSTAL SERVICE

Knowledge Check

Where would you click to see the customer interactions for the last 2 hours?

Dennis Von
00:02:35
CONTACT
RESPONSES
Information
History
All
1M
1W
1D
Filter
Quick search
Send

Case Information

Origin: Inbound SMS Session Mode
PROJECT_NAME: Tracking
TRACKING_NUMBER: 9262420126101899933609
ZIP: 07040

Dennis Von Connected (7)

6 message exchanges with this contact in the past 2 hours
Show messages

Dennis Von 1:50:55 PM
Hi

Characters Remaining: 150

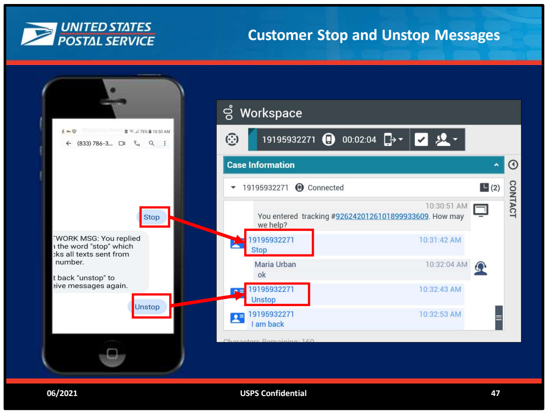
Status	Subject	Start Date	End Date
In Progress		7/1/2020 1:50:55 PM	
Done	Yes	7/1/2020 1:26:24 PM	7/1/2020 1:50:51 PM
Done	Hey I am back	7/1/2020 1:16:20 PM	7/1/2020 1:25:07 PM
Done	Yes	7/1/2020 1:09:19 PM	7/1/2020 1:16:04 PM
Done	Yes	7/1/2020 12:53:57 PM	7/1/2020 12:56:01 PM
Done	Hey	7/1/2020 12:50:43 PM	7/1/2020 12:52:15 PM
Done	Yes	7/1/2020 12:50:07 PM	7/1/2020 12:50:40 PM
Done	Yes	7/1/2020 10:59:11 AM	7/1/2020 11:02:18 AM
Done	Hi	6/30/2020 8:22:17 AM	6/30/2020 8:22:20 AM

06/2021 USPS Confidential 46

Slide Duration: 1 minute
1 animation

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

Click to display the correct answer.


UNITED STATES POSTAL SERVICE
Customer Stop and Unstop Messages
(833) 786-3...
Stop
TWORK MSG: You replied
ı the word "stop" which
:ks all texts sent from
number.
t back "unstop" to
eive messages again.
Unstop
Workspace
19195932271
00:02:04
Case Information
CONTACT
Characters Remaining: 160

19195932271 Connected (2)

10:30:51 AM
You entered tracking #9262420126101899933609. How may we help?

19195932271 10:31:42 AM
Stop

Maria Urban 10:32:04 AM
ok

19195932271 10:32:43 AM
Unstop

19195932271 10:32:53 AM
I am back

06/2021 USPS Confidential 47

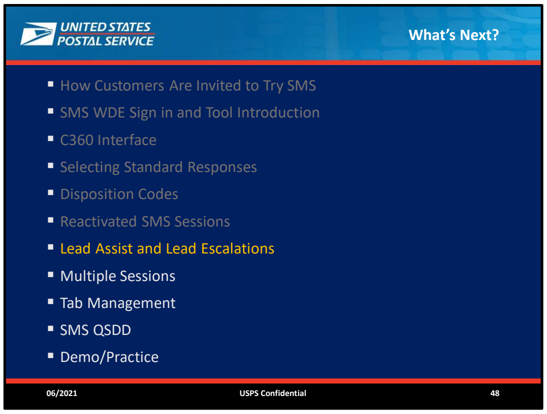
Slide Duration: 2 minutes
2 animations

Do

Explain that customers can stop the SMS interaction by texting “Stop”.
Point out that the Agent will see the “Stop” text in WDE SMS interaction active chat window.
Click for animation showing the corresponding Stop highlights.
Explain that customers can text “Unstop” to reactivate the session.
Click for animation showing the corresponding unstop highlights.

Say

Use Idle Standard Responses at the recommended times to allow the customer the opportunity to reactivate.
After the appropriate waiting time, disposition the call as “Idle” and click Done.



UNITED STATES POSTAL SERVICE

What’s Next?

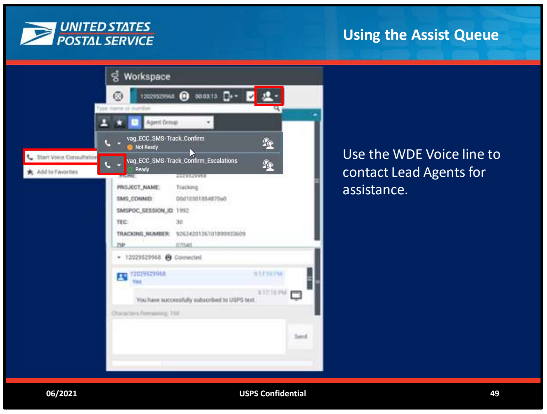
- How Customers Are Invited to Try SMS
- SMS WDE Sign in and Tool Introduction
- C360 Interface
- Selecting Standard Responses
- Disposition Codes
- Reactivated SMS Sessions
- Lead Assist and Lead Escalations
- Multiple Sessions
- Tab Management
- SMS QSDD
- Demo/Practice

06/2021 USPS Confidential 48

Slide Duration: 1 minute

Do

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



Using the Assist Queue

Workspace
Agent Group
vag_ECC_SMS-Track_Confirm
Not Ready
vag_ECC_SMS-Track_Confirm_Escalations
Ready
Start Voice Consultation
Add to Favorites
Connected
Send

PROJECT_NAME: Tracking

SMSPOC_SESSION_ID: 1992

TEC: 30

You have successfully subscribed to USPS test

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

06/2021 USPS Confidential 49

Slide Duration: 2 minutes

Do

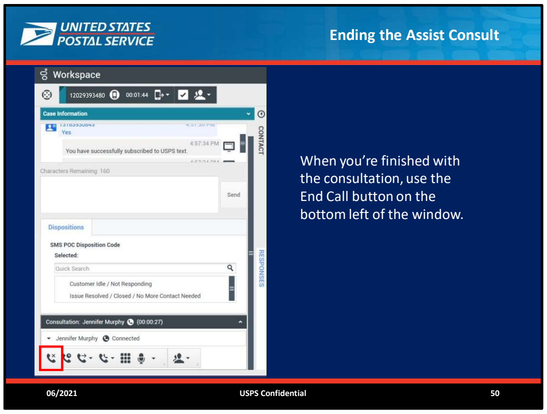
Explain that SMS Agents will use a WDE voice line to contact the Lead Agents for assistance.

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

Note that the first time Agents use the Escalation button, they can select the Agent Group drop-down and type “SMS.” After they have selected Vag_ECC_SMS-Track_Confirm_Escalations (at the bottom of the list), it is then available in their Recent list (i.e., at the top of the list). **It does not typically remain in Favorites.**

Emphasize that the Agents need to use the “Escalations” queue. If they use the other one, they’ll reach any available Agent, not a lead.

DO NOT use the “vag_ECC_SMS-Track_Confirm” option. That is NOT for us to use.



UNITED STATES POSTAL SERVICE

Ending the Assist Consult

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

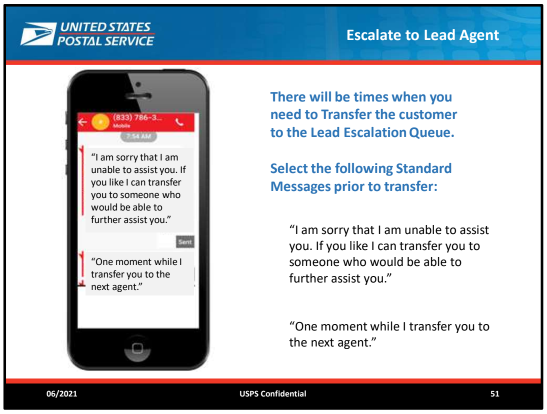
06/2021 USPS Confidential 50

Workspace
12029393480
00:01:44
Case Information
Yes
You have successfully subscribed to USPS text.
4:57:34 PM
Characters Remaining: 160
Send
CONTACT
Dispositions
SMS POC Disposition Code
Selected:
Quick Search
Customer Idle / Not Responding
Issue Resolved / Closed / No More Contact Needed
RESPONSES
Consultation: Jennifer Murphy (00:00:27)
Jennifer Murphy
Connected

Slide Duration: 1 minute

Do

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



Escalate to Lead Agent

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

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

There will be times when you need to Transfer the customer to the Lead Escalation Queue.

Select the following Standard Messages prior to transfer:

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

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

06/2021 USPS Confidential 51

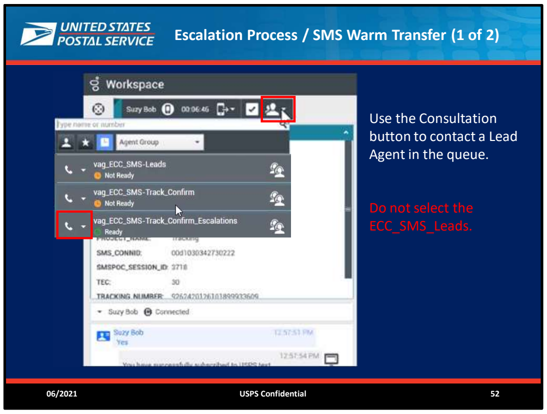
Slide Duration: 2 minutes

Say
You will transfer customers who are calling about issues **not** covered by the applicable call types/event codes **and** issues with no standard messages.

However, if the customer is making a simple inquiry such as the hours or contact information for a Post Office, use the standard response for that, making sure to edit the response with the correct details for that location. You can also use free text to answer their question. Be sure to notify your supervisor by IM if they need to use a non-standard response.

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

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



UNITED STATES POSTAL SERVICE

Escalation Process / SMS Warm Transfer (1 of 2)

Workspace
Suzy Bob
00:06:46
Type name or number
Agent Group
vag_ECC_SMS-Leads
Not Ready
vag_ECC_SMS-Track_Confirm
Not Ready
vag_ECC_SMS-Track_Confirm_Escalations
Ready
Suzy Bob
Connected
Suzy Bob
Yes
12:57:51 PM
12:57:54 PM

PROJECT_NAME: Tracking
SMS_CONNID: 00d1030342730222
SMSPOC_SESSION_ID: 3718
TEC: 30
TRACKING_NUMBER: 9262420126101899933609

Use the Consultation button to contact a Lead Agent in the queue.

Do not select the ECC_SMS_Leads.

06/2021 USPS Confidential 52

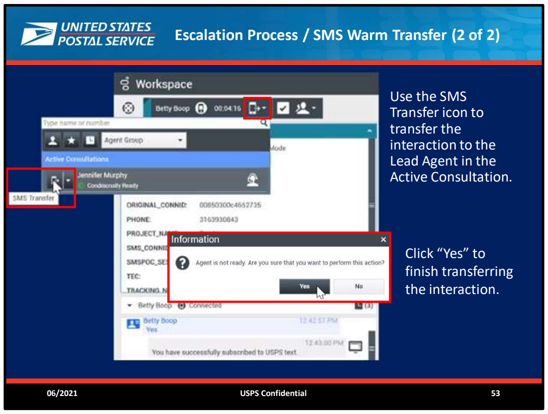
Slide Duration: 1 minute

Say
If you need to escalate an issue to a Lead, it will be a warm transfer. You will first call the Lead Agent Queue. Once you've connected to a Lead Agent, you'll tell them by voice what's happened in the conversation so far. Finally, when they're ready, you will transfer the SMS interaction to them.

That process begins when you click the "Start Consultation" icon. In the dropdown that appears, you'll click on the phone icon in the "ECC_SMS_Escalations" queue.

When a Lead Agent comes on the line, explain the situation. Remember, you have a customer waiting, so be brief, but thorough.

Note: In Production, there is a drop-down that has ECC_SMS_Leads. **DO NOT SELECT**.


UNITED STATES POSTAL SERVICE
Workspace
Betty Boop
00:04:16
Type name or number
Agent Group
Active Consultations
Jennifer Murphy
Conditionally Ready
SMS Transfer
Mode
ORIGINAL_CONNID: 00850300c4652735
PHONE: 3163930843
PROJECT_NA
SMS_CONNI
SMSPOC_SE
TEC:
TRACKING_N
Information
Yes
No
Betty Boop Connected
(3)
Betty Boop
Yes
12:42:57 PM
12:43:00 PM

Escalation Process / SMS Warm Transfer (2 of 2)

Use the SMS Transfer icon to transfer the interaction to the Lead Agent in the Active Consultation.

Agent is not ready. Are you sure that you want to perform this action?

You have successfully subscribed to USPS text.

Click "Yes" to finish transferring the interaction.

06/2021 USPS Confidential 53

Slide Duration: 2 minutes
1 animation

Say
Once you've explained the situation to the Lead Agent, and they're ready, you can transfer the interaction to them.

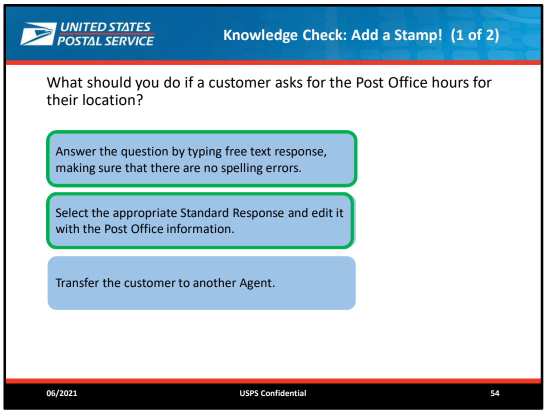
Begin that process by clicking the SMS Transfer icon. WDE will show you that you have an active consultation with the Lead you've been talking to. Click the SMS transfer button next to their name to make the transfer.

Do
Click to show the "Agent not ready" message, highlight, and additional slide text.

Say
WDE will warn you that the Agent is not ready. This is because they're on the phone with you.

WDE will send a toaster pop-up to the Lead Agent similar to the one you received when you accepted the SMS transfer. Once the Lead accepts the interaction-transfer request, the interaction window closes on your desktop and opens on the desktop of the transfer target, the lead Agent. While you're on the phone with the Lead Agent, make sure that they have the SMS interaction. Now you can disconnect the voice call.

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



UNITED STATES POSTAL SERVICE

Knowledge Check: Add a Stamp! (1 of 2)

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

Answer the question by typing free text response, making sure that there are no spelling errors.

Select the appropriate Standard Response and edit it with the Post Office information.

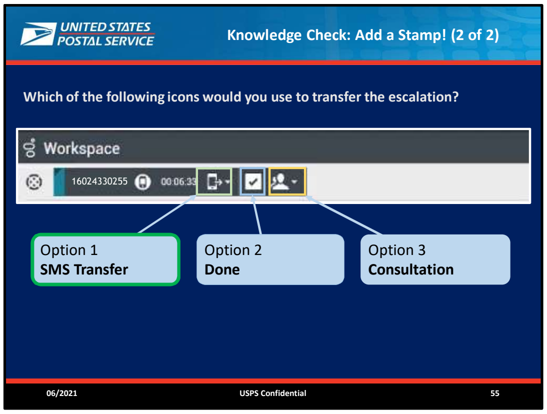
Transfer the customer to another Agent.

06/2021 USPS Confidential 54

Slide Duration: 2 minutes
1 animation

Do
Instruct Agents to use the annotation tool to answer the question.
After some time, click to show the correct answers:
- Answer the question by typing free text response, making sure that there are no spelling errors.
- Select the appropriate Standard Response and edit it with the Post Office information.

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



UNITED STATES POSTAL SERVICE

Knowledge Check: Add a Stamp! (2 of 2)

Which of the following icons would you use to transfer the escalation?

Option 1
SMS Transfer

Option 2
Done

Option 3
Consultation

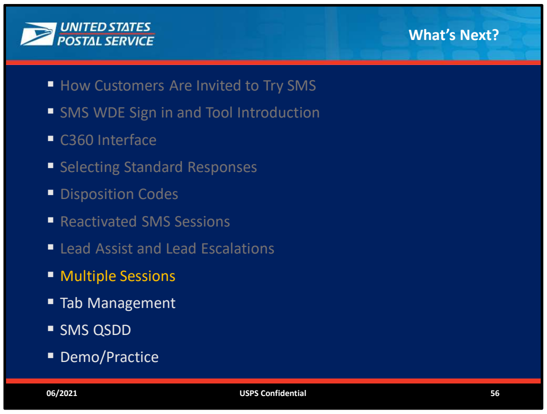
06/2021 USPS Confidential 55

Slide Duration: 1 minute

Do
Instruct to use the annotation tool to answer the question.

Use the annotation tool to circle the correct answer: the Transfer (phone) icon.

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



UNITED STATES POSTAL SERVICE

What's Next?

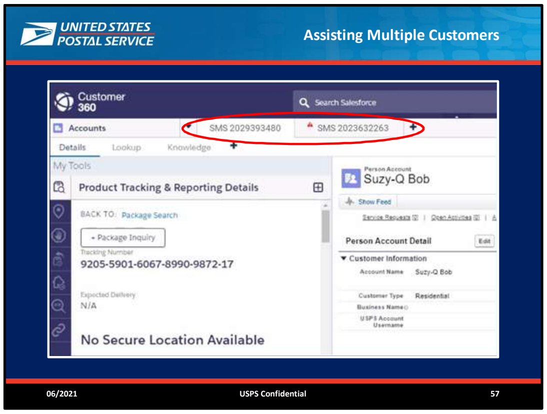
- How Customers Are Invited to Try SMS
- SMS WDE Sign in and Tool Introduction
- C360 Interface
- Selecting Standard Responses
- Disposition Codes
- Reactivated SMS Sessions
- Lead Assist and Lead Escalations
- Multiple Sessions
- Tab Management
- SMS QSDD
- Demo/Practice

06/2021 USPS Confidential 56

Slide Duration: 1 minute

Do

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



Assisting Multiple Customers

UNITED STATES POSTAL SERVICE
Customer 360
Search Salesforce
Accounts
SMS 2029393480
SMS 2023632263
Details
Lookup
Knowledge
My Tools
Product Tracking & Reporting Details
BACK TO: Package Search
+ Package Inquiry
Person Account
Suzy-Q Bob
Show Feed
Service Requests
Open Activities
Person Account Detail
Edit
Customer Information

Tracking Number
9205-5901-6067-8990-9872-17

Expected Delivery
N/A

No Secure Location Available

Account Name: Suzy-Q Bob
Customer Type: Residential
Business Name:
USPS Account Username:

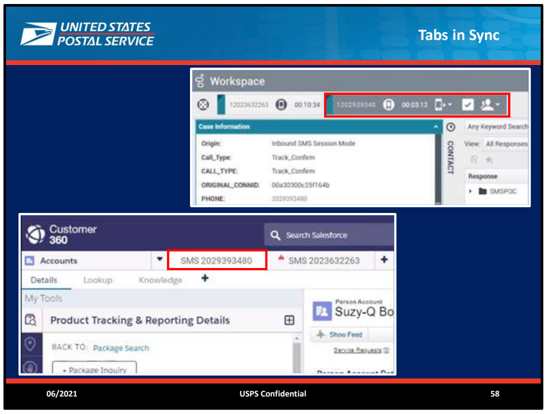
06/2021 USPS Confidential 57

Slide Duration: 1 minute

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

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

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



Tabs in Sync

UNITED STATES
POSTAL SERVICE
Workspace
12023632263
00:10:34
12029393480
00:03:12
Any Keyword Search
View: All Responses
CONTACT
Response
SMSPOC
Customer 360
Search Salesforce
Accounts
SMS 2029393480
SMS 2023632263
Details
Lookup
Knowledge
My Tools
Product Tracking & Reporting Details
BACK TO: Package Search
+ Package Inquiry
Person Account
Suzy-Q Bo
Show Feed
Service Requests

Case Information

Origin: Inbound SMS Session Mode
Call_Type: Track_Confirm
CALL_TYPE: Track_Confirm
ORIGINAL_CONNID: 00a30300c25f164b
PHONE: 2029393480

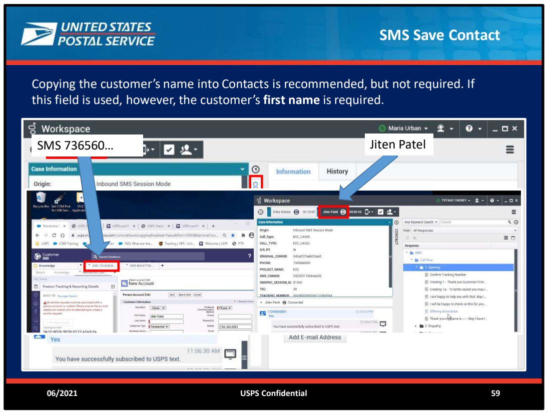
06/2021 USPS Confidential 58

Slide Duration: 1 minute

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

Note that the interaction on the right in WDE matches the tab on the left in C360.

When you’re finished with an interaction and close it in WDE, the matching tab in C360 should close, too. Sometimes it doesn’t, so you’ll have to pay attention and manually close the correct tab.



SMS Save Contact

Copying the customer's name into Contacts is recommended, but not required. If this field is used, however, the customer's **first name** is required.

06/2021 USPS Confidential 59

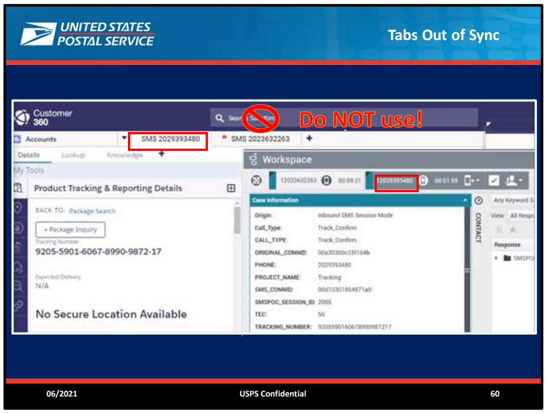
Slide Duration: 1 minute

Say
It is not a requirement to copy the customer's name in the Contacts field. It is, however, helpful because the name appears in some responses and displays in the SMS tab.

If you choose to use this field, you are required to type the customer's **first name** in the field. We saw an example of this is an earlier video.

Do
Click for animation.

Say
This is a screenshot from an actual interaction. Notice that the tab titles in SMS and C360 don't match. The SMS tab reads "Jiten Patel" and the C360 tab displays the phone number.



UNITED STATES POSTAL SERVICE

Tabs Out of Sync

Do NOT use!

Origin: Inbound SMS Session Mode
Call_Type: Track_Confirm
CALL_TYPE: Track_Confirm
ORIGINAL_CONNID: 00a30300c25f164b
PHONE: 2029393480
PROJECT_NAME: Tracking
SMS_CONNID: 00d10301854871a0
SMSPOC_SESSION_ID: 2085
TEC: 55
TRACKING_NUMBER: 9205590160678990987217

06/2021 USPS Confidential 60

Customer 360
Accounts
SMS 2029393480
SMS 2023632263
Details
Lookup
Knowledge
My Tools
Product Tracking & Reporting Details
BACK TO: Package Search
• Package Inquiry
Tracking Number
9205-5901-6067-8990-9872-17
Expected Delivery
N/A
No Secure Location Available
Workspace
12023632263
00:09:21
12029393480
00:01:59
Case Information
CONTACT
Any Keyword
View
All Respo
Response
SMSPO

Slide Duration: 2 minutes

Do

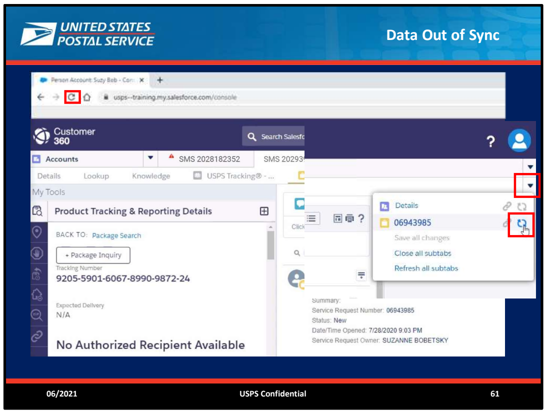
Emphasize to the Agents are NOT to use global search to find customer accounts.
Remind the Agents that they should look for knowledge articles in the sub-tabs, so they stay matched up with the customer it's related to.

Say

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

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

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



Data Out of Sync

Tracking Number
9205-5901-6067-8990-9872-24

Expected Delivery
N/A

No Authorized Recipient Available

Summary:
Service Request Number: 06943985
Status: New
Date/Time Opened: 7/28/2020 9:03 PM
Service Request Owner: SUZANNE BOBETSKY

UNITED STATES POSTAL SERVICE
Person Account: Suzy Bob - Con
usps--training.my.salesforce.com/console
Customer 360
Search Salesfo
Accounts
SMS 2028182352
SMS 20293
Details
Lookup
Knowledge
USPS Tracking® - ...
My Tools
Product Tracking & Reporting Details
BACK TO: Package Search
+ Package Inquiry
Details
06943985
Save all changes
Close all subtabs
Refresh all subtabs
06/2021
USPS Confidential
61

Slide Duration: 2 minutes
4 animations

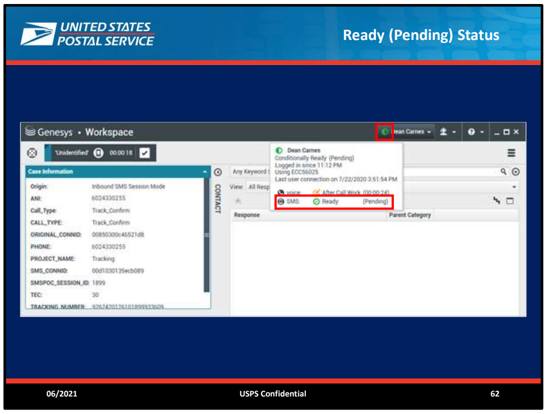
Say
We usually use the C360 tab refresh drop down (not pictured here), such as when we're working with Service Requests. We generally avoid using the browser refresh button whenever possible.

Do
Explain that if C360 starts behaving oddly, using the browser refresh button is a quick workaround to try.
Click to show the highlight on the browser refresh button.
Tell the Agents that if they do a browser refresh, they'll need to close the C360 tabs manually when the interaction is finished, because the syncing with WDE is broken.

Emphasize the difference of the two types of refresh: C360 tab refresh is NOT the same as a browser refresh.
Transition into a discussion about the C360 tab refresh.

Click to show the overlay of the right side of the C360 window and the highlight on the subtab dropdown.
The highlight on the browser refresh button will disappear.
Point out that there is a dropdown menu for the main tab, and another for the subtab that the Service Request is in.
Emphasize that if the Agent wants to refresh the Service Request, make sure they use the subtab drop down menu.
Click to show the animation of the subtab dropdown and the highlight the refresh icon.
Emphasize that this refreshes only the tab with the Service Request in it.

Explain that if either C360 or WDE starts acting oddly, Agents should report it to their Supervisor. The Supervisor will create an IT ticket to get awareness of the issue.



Ready (Pending) Status

'Unidentified' 00:00:18

Dean Carnes
Conditionally Ready (Pending)
Logged in since 11:12 PM
Using ECC56025
Last user connection on 7/22/2020 3:51:54 PM
voice: After Call Work (00:00:24)
SMS: Ready (Pending)

Case Information

Origin:	Inbound SMS Session Mode
ANI:	6024330255
Call_Type:	Track_Confirm
CALL_TYPE:	Track_Confirm
ORIGINAL_CONNID:	00850300c46521d8
PHONE:	6024330255
PROJECT_NAME:	Tracking
SMS_CONNID:	00d1030135ecb089
SMSPOC_SESSION_ID:	1899
TEC:	30
TRACKING_NUMBER:	9262470126101899933606

Response	Parent Category

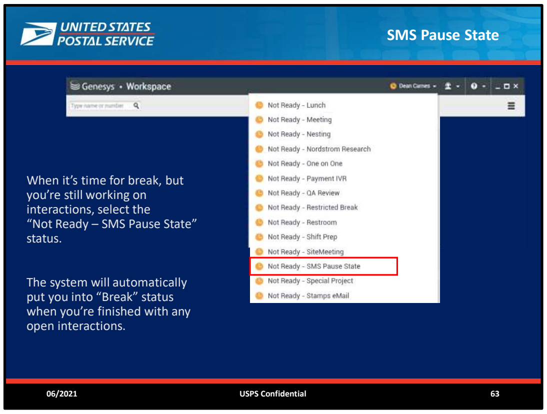
06/2021 USPS Confidential 62

Slide Duration: 1 minute

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

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

Your supervisors will help you keep an eye on it.



UNITED STATES
POSTAL SERVICE

SMS Pause State

Genesys • Workspace
Dean Carnes
Type name or number
Not Ready - Lunch
Not Ready - Meeting
Not Ready - Nesting
Not Ready - Nordstrom Research
Not Ready - One on One
Not Ready - Payment IVR
Not Ready - QA Review
Not Ready - Restricted Break
Not Ready - Restroom
Not Ready - Shift Prep
Not Ready - SiteMeeting
Not Ready - SMS Pause State
Not Ready - Special Project
Not Ready - Stamps eMail

When it’s time for break, but you’re still working on interactions, select the “Not Ready – SMS Pause State” status.

The system will automatically put you into “Break” status when you’re finished with any open interactions.

06/2021 USPS Confidential 63

Slide Duration: 2 minutes

Do

Read the text on the slide.

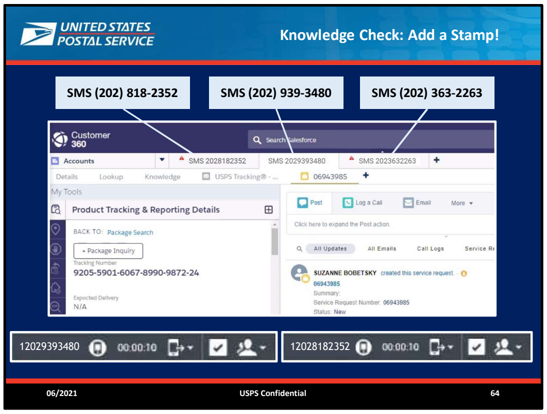
Acknowledge that the image of the status list is larger than normal. It was enlarged to Agents can read it.

Explain that this status prevents the system from sending new interactions to the Agent.

Tell the Agents that they’ll use this “Not Ready - SMS Pause State” status before lunch, restroom breaks, and the end of the day, too.

Agents will have to manually select out of “Not Ready - SMS Pause State” to any other status, such as “Lunch” or “RestRoom.”

Avoid setting specific time periods for using the “Not Ready - SMS Pause State” setting. Tell the Agents that their supervisors will give them guidance.



UNITED STATES POSTAL SERVICE

Knowledge Check: Add a Stamp!

SMS (202) 818-2352

SMS (202) 939-3480

SMS (202) 363-2263

Customer 360
Search Salesforce
Accounts
SMS 2028182352
SMS 2029393480
SMS 2023632263
Details
Lookup
Knowledge
USPS Tracking® - ...
06943985
My Tools
Product Tracking & Reporting Details
BACK TO: Package Search
+ Package Inquiry
Post
Log a Call
Email
More
Click here to expand the Post action.
All Updates
All Emails
Call Logs
Service Re
12029393480
00:00:10
12028182352
00:00:10

Tracking Number
9205-5901-6067-8990-9872-24

Expected Delivery
N/A

SUZANNE BOBETSKY created this service request.
06943985
Summary:
Service Request Number: 06943985
Status: New

06/2021 USPS Confidential 64

Slide Duration: 2 minutes
2 animations

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

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

Do
Click for first tab title to appear on the bottom right. Direct Agents to use the annotation tool to place a stamp on the correct tab callout from the top row of tabs.
Answer for first question is the third callout tab on the top row.

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

Say
The next slide shows a video that demonstrate handling multiple interactions.

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Video: Handling Multiple Interactions

SMS - Agent Handling Multiple Interactions

06/2021 USPS Confidential 65

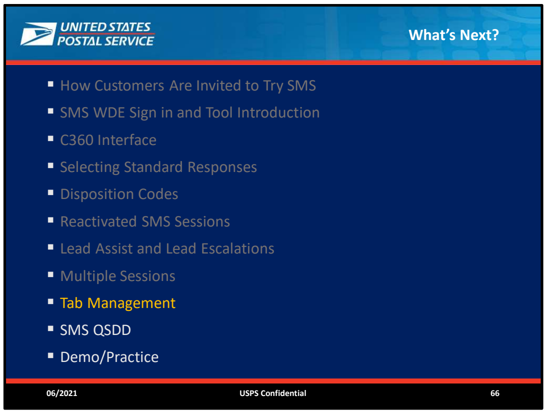
Slide Duration: 25 minutes

Instructor Note: This video demonstrates an Agent handling multiple interactions – in actual speed **and** in slow motion.
Timing: 00 – 14:58 is slow-motion of an Agent handling an interaction from beginning to end, while working one other interaction. 15:00 - end is the same video at live speed.

Do
Click to play the video. (Duration: 22 minutes)

Note the following key points in the video you may want return to or pause at.

- :15 C360 new account
- :19 CTY
- :33 Copying names from message to C360 and WDE Contacts tab
- 1:11 Using standard responses
- 1:20 When you return to messages you may have to scroll back to the bottom.
- 1:22 Agent selects standard response for SR number, completes SR in C360, and copies the SR number into the messages and sends to the customer.
- 2:10 Flashing interaction tab in WDE
- 3:28 Customer name pre-populated in standard response message
- 3:55 Agent prepopulating the next response in anticipation of customers answer
- 4:20 Using sticky notes
- 5:18 Stacking responses
- 5:50 Closing interaction
- 10:13 Using sticky notes
- 10:52 New interaction and new account screen
- 11:57 Minimized interaction Case Information window to provide more space for messages
- 12:14 Switching between tabs
- 15:00 Actual speed video begins.



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What's Next?

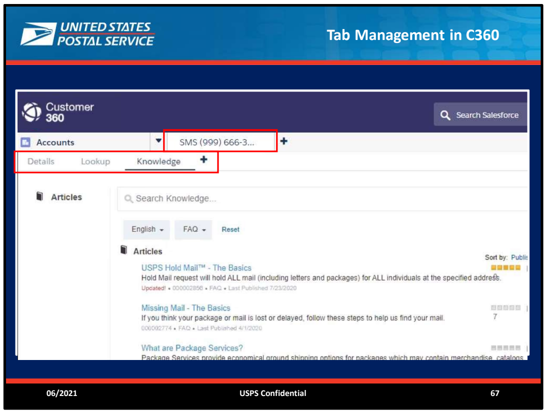
- How Customers Are Invited to Try SMS
- SMS WDE Sign in and Tool Introduction
- C360 Interface
- Selecting Standard Responses
- Disposition Codes
- Reactivated SMS Sessions
- Lead Assist and Lead Escalations
- Multiple Sessions
- Tab Management
- SMS QSDD
- Demo/Practice

06/2021 USPS Confidential 66

Slide Duration: 1 minute

Do

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



Tab Management in C360

UNITED STATES
POSTAL SERVICE
Customer 360
Search Salesforce
Accounts
SMS (999) 666-3...
Details
Lookup
Knowledge
Articles
Search Knowledge...
English
FAQ
Reset
Articles
Sort by: Publis

USPS Hold Mail™ - The Basics
Hold Mail request will hold ALL mail (including letters and packages) for ALL individuals at the specified address.
Updated! • 000002856 • FAQ • Last Published 7/23/2020

Missing Mail - The Basics
If you think your package or mail is lost or delayed, follow these steps to help us find your mail.
000002774 • FAQ • Last Published 4/1/2020

What are Package Services?

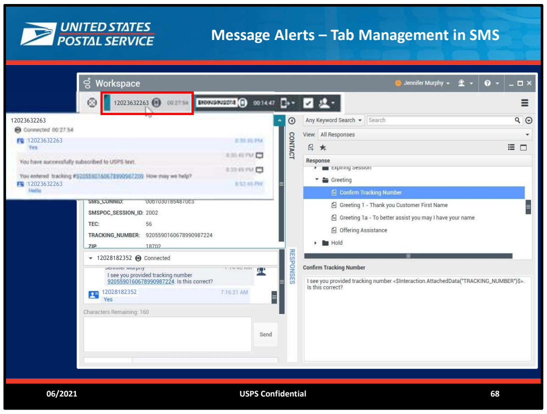
06/2021 USPS Confidential 67

Slide Duration: 2 minutes
2 animations

Say
While you're communicating with the customer in SMS WDE, you may also need to switch back to C360 to check on things or to create a Service Request. As you do that, you may notice that there is something different here that should make working in C360 easier for the SMS project.

Do
Click to show the highlights on the tabs.
Explain that in addition to the regular tabs you usually use in C360, SMS will make more use of sub-tabs to organize the interaction. Agents will be able keep tasks related to a single SMS interaction organized together and stay below the five-tab limits. Tasks related to that SMS interaction will stay organized below that main tab.
Click to animate Knowledge in the sub tab.
Explain that just like the main tabs, sub tabs also have five-tab limits.

Note that regardless of how Agents access knowledge articles, they will open as primary tabs, even if they use the Knowledge subtab to search for articles.



Message Alerts – Tab Management in SMS

UNITED STATES POSTAL SERVICE
Workspace
Jennifer Murphy
12023632263
00:27:54
00:14:47
CONTACT
RESPONSES
Any Keyword Search
Search
View: All Responses
Response
Expiring Session
Greeting
Confirm Tracking Number
Greeting 1 - Thank you Customer First Name
Greeting 1a - To better assist you may I have your name
Offering Assistance
Hold
Characters Remaining: 160
Send

12023632263
Connected 00:27:54

12023632263
Yes

You have successfully subscribed to USPS text

12023632263
Hello

SMSPOC_SESSION_ID: 2002
TEC: 56
TRACKING_NUMBER: 9205590160678990987224
ZIP: 18702

12028182352 Connected

I see you provided tracking number 9205590160678990987224. Is this correct?

12028182352 7:16:21 AM
Yes

Confirm Tracking Number

I see you provided tracking number <$Interaction.AttachedData("TRACKING_NUMBER")$>. Is this correct?

06/2021 USPS Confidential 68

Slide Duration: 2 minutes
2 animations

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

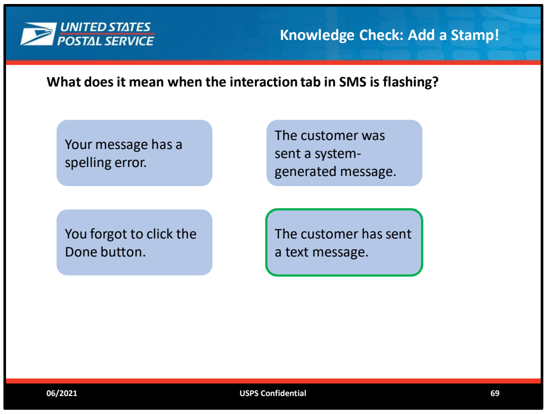
For example, notice that in this image, the Agent is messaging with the second customer. We know that because that’s the one with the darker interaction bar. If the first customer sends a message, their interaction tab will flash yellow to let you know that the customer is waiting for a response.

Do
Click for animation.

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

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

Do
Click to show rolling over the tab.



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Knowledge Check: Add a Stamp!

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

Your message has a spelling error.

The customer was sent a system-generated message.

You forgot to click the Done button.

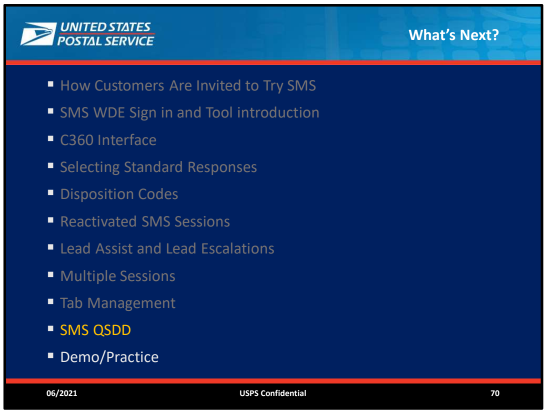
The customer has sent a text message.

06/2021 USPS Confidential 69

Slide Duration: 1 minute
1 animation

Do
Tell Agents to select the correct answer using the annotation tool.

Click to display the correct answer.



What's Next?

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

06/2021 USPS Confidential 70

Slide Duration: 1 minute

Do

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

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SMS QSDD

SMS Interactions will undergo Quality reviews -- the same as voice interactions

Quality: SMS Call Handling > QA Scorecard for Voice and Chat

06/2021
USPS Confidential
71

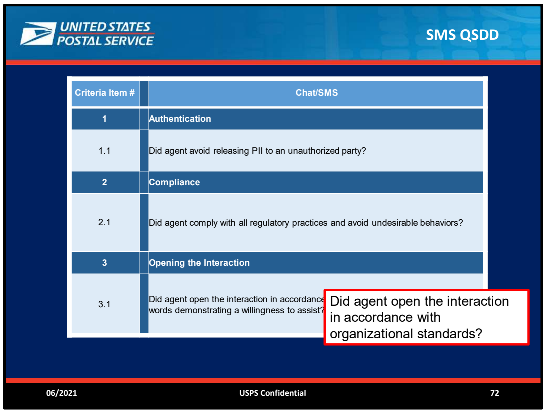
Slide Duration: 2 minutes

Do

Tell Agents that SMS Interactions will undergo Quality reviews.

Instruct Agents to open the Knowledge article, **Quality: SMS Call Handling**, select the link, “QA Scorecard for Voice and Chat,” and review/identify the differences.
Note: The next five slides can be used as an answer key.

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



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SMS QSDD

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

Did agent open the interaction in accordance with organizational standards?

06/2021 USPS Confidential 72

Slide Duration: 1 minute
1 animation

Say

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

Here’s an example of the SMS QSDD Scorecard.

Do

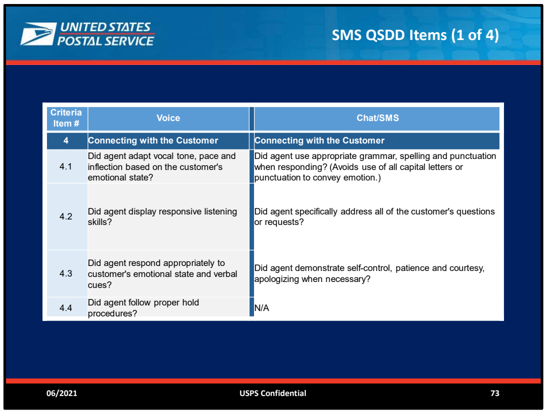
Read 3.1.

Click to show the corresponding item for the voice QSDD.

Read the voice QSDD item and point out the differences between the two. (If the customer uses profanity **one time**, you may disconnect the interaction.)

Say

Let’s review the rest of the SMS QSDD.



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SMS QSDD Items (1 of 4)

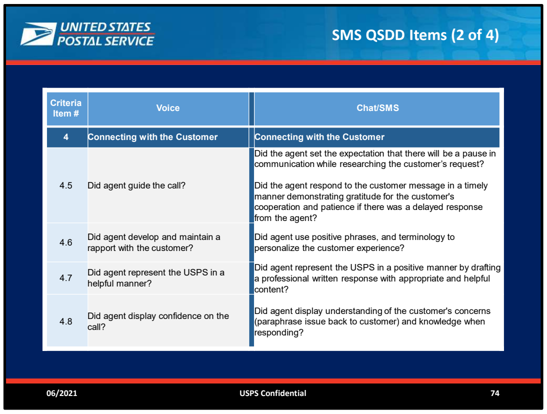
Criteria Item #	Voice	Chat/SMS
4	**Connecting with the Customer**	**Connecting with the Customer**
4.1	Did agent adapt vocal tone, pace and inflection based on the customer's emotional state?	Did agent use appropriate grammar, spelling and punctuation when responding? (Avoids use of all capital letters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

06/2021 USPS Confidential 73

Slide Duration: 3 minutes

Do

Have the Agents open the **Quality: SMS Handling** knowledge article to read the QSDD as we discuss. Compare the voice and SMS items. Stress the SMS differences.



SMS QDD Items (2 of 4)

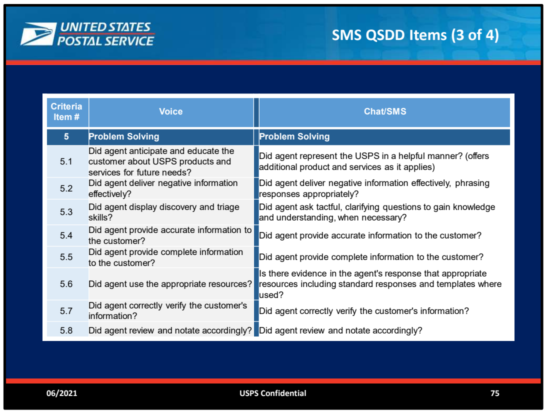
Criteria Item #	Voice	Chat/SMS
4	Connecting with the Customer	Connecting with the Customer
4.5	Did agent guide the call?	Did the agent set the expectation that there will be a pause in communication while researching the customer's request? Did the agent respond to the customer message in a timely manner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

06/2021 USPS Confidential 74

Slide Duration: 3 minutes

Do

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



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SMS QSDD Items (3 of 4)

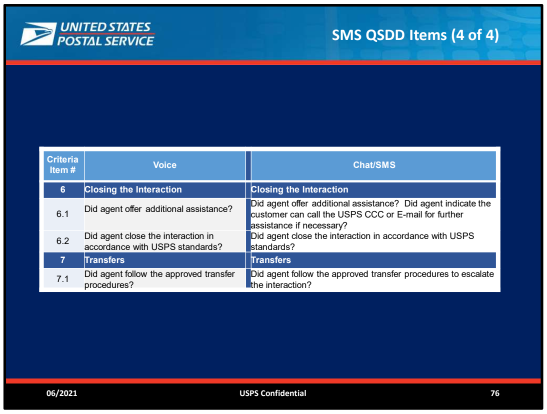
Criteria Item #	Voice	Chat/SMS
5	**Problem Solving**	**Problem Solving**
5.1	Did agent anticipate and educate the customer about USPS products and services for future needs?	Did agent represent the USPS in a helpful manner? (offers additional product and services as it applies)
5.2	Did agent deliver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

06/2021 USPS Confidential 75

Slide Duration: 3 minutes

Do

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



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SMS QSDD Items (4 of 4)

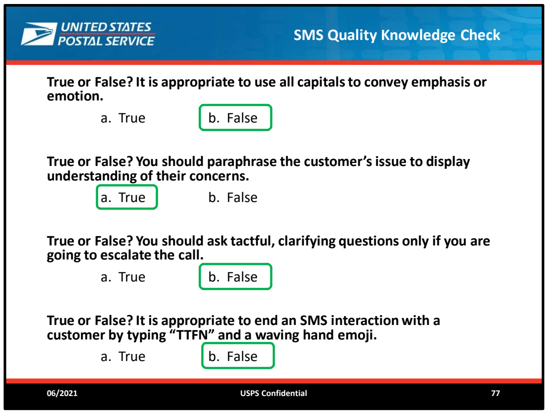
Criteria Item #	Voice	Chat/SMS
6	**Closing the Interaction**	**Closing the Interaction**
6.1	Did agent offer additional assistance?	Did agent offer additional assistance? Did agent indicate the customer can call the USPS CCC or E-mail for further assistance if necessary?
6.2	Did agent close the interaction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

06/2021 USPS Confidential 76

Slide Duration: 3 minutes

Do

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



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SMS Quality Knowledge Check

True or False? It is appropriate to use all capitals to convey emphasis or emotion.

a. True [✓ b. False]

True or False? You should paraphrase the customer's issue to display understanding of their concerns.

[✓ a. True] b. False

True or False? You should ask tactful, clarifying questions only if you are going to escalate the call.

a. True [✓ b. False]

True or False? It is appropriate to end an SMS interaction with a customer by typing "TTFN" and a waving hand emoji.

a. True [✓ b. False]

06/2021 USPS Confidential 77

Slide Duration: 2 minutes
4 animations

Do

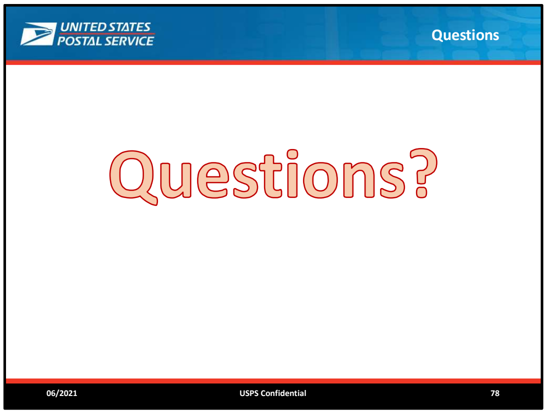
Explain that this knowledge check is based on the SMS Quality Scorecard we just reviewed.
Direct the Agents to use the Stamp Annotate Tool to select their answers to the questions below.
Encourage the Agents refer to the Quality Knowledge Article to answer these questions.
Be sure to clear the Agent's annotations before starting the next question. The correct answer highlights will disappear on their own after one second.

Q1: It is appropriate to use all capitals to convey emphasis or emotion.
Direct Agents to place a Zoom Annotation stamp.
Click to animate the answer. Highlight will disappear on its own after one second.
Answer is FALSE. Refer to criteria item #4.1 for more information.

Q2: You should paraphrase the customer's issue to display understanding of their concerns.
Direct Agents to place a Zoom Annotation stamp.
Click to animate the answer. Highlight will disappear on its own after one second.
Answer is TRUE. Refer to criteria item #4.8 for more information.

Q3: You should ask tactful, clarifying questions only if you are going to escalate the call.
Direct Agents to place a Zoom Annotation stamp.
Click to animate the answer. Highlight will disappear on its own after one second.
Answer is FALSE. Refer to criteria item #5.3 for more information.

Q4: It is appropriate to end an SMS interaction with a customer by typing "TTFN" and a waving hand emoji.
Direct Agents to place a Zoom Annotation stamp.
Click to animate the answer. Highlight will disappear on its own after one second.
Answer is FALSE. Refer to criteria item #6.2 for more information.



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Questions

Questions?

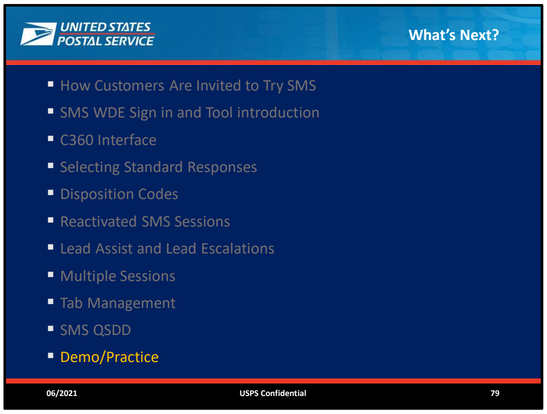
06/2021 USPS Confidential 78

Slide Duration: 25 minutes

Do

Invite Agents to post questions in Zoom Chat.

Address questions and “parking lot” the questions you cannot answer. Assure Agents that you will find the answers to these questions as soon as you can.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What's Next?

- How Customers Are Invited to Try SMS
- SMS WDE Sign in and Tool introduction
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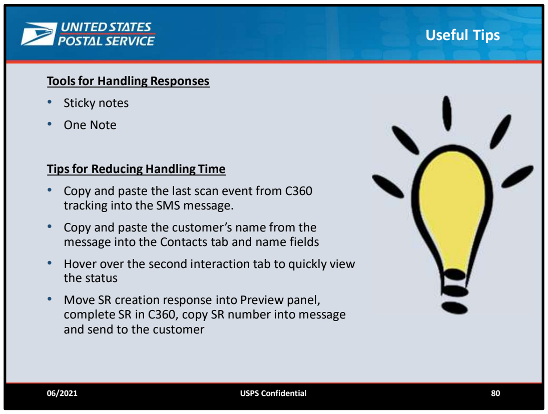
- Multiple Sessions
- Tab Management
- SMS QSDD
- Demo/Practice

06/2021 USPS Confidential 79

Slide Duration: 1 minute

Do

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



Useful Tips

Tools for Handling Responses
- Sticky notes
- One Note

Tips for Reducing Handling Time
- Copy and paste the last scan event from C360 tracking into the SMS message.
- Copy and paste the customer's name from the message into the Contacts tab and name fields
- Hover over the second interaction tab to quickly view the status
- Move SR creation response into Preview panel, complete SR in C360, copy SR number into message and send to the customer

06/2021 USPS Confidential 80

Slide Duration: 3 minutes

Say
These are some tips from current SMS Agents.

Do
Review the slide.

Tools for Handling Responses
Sticky notes enables Agents to quickly copy and paste responses they frequently use.

One Note is a collaborative document that enables Agents to customize commonly used responses and categorize them using tabs. This is an optional tool, and Agents can ask their Supervisors for guidance.
- Note: Slide 83 shows a video of this process.

Tips for Reducing Handling Time
Copy the information from the C360 tracking information pane (expected delivery date) and paste directly into the SMS message to reduce typing time and errors.
- Note: Slide 84 shows a video ("SMS Response Sources") of this process.

Copy and paste the customer's name from the message into the Contacts tab in WDE and name fields in the C360 account detail to minimize re-typing.
- Note: This was shown in the video on Slide 15: Handling an Incoming Interaction.

Hover over the second interaction tab to quickly view the status (and stop the timer).
- Note: The next slide shows a video ("SMS – Tab Rollover") of this process.

Move SR creation response into Preview panel, complete SR in C360, copy SR number into message and send to the customer
- Note: This was shown in the video on Slide 66: Agent Handling Multiple Interactions, 1:22.

Say

The next two slides use videos to show one Agent using the mouse to hover over an interaction tab to view the status, and another Agent copying and pasting tracking information.

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Rolling Over Tabs

ECC

SMS - Tab Rollover

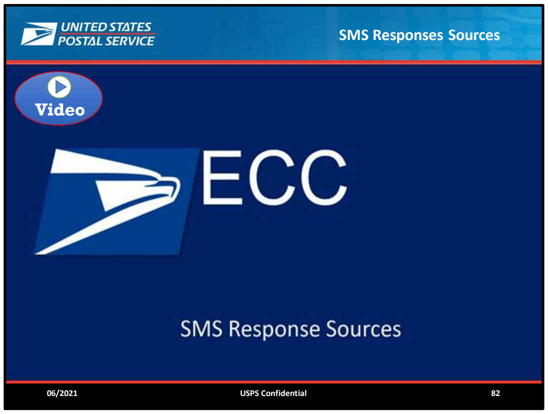
06/2021 USPS Confidential 81

Slide Duration: 1 minute

Instructor Note: This video demonstrates an Agent rolling over tabs to quickly view the conversation status – in actual speed **and** in slow motion.

Do

Click to play the video. (Duration: 31 seconds)



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SMS Responses Sources

Video

ECC

SMS Response Sources

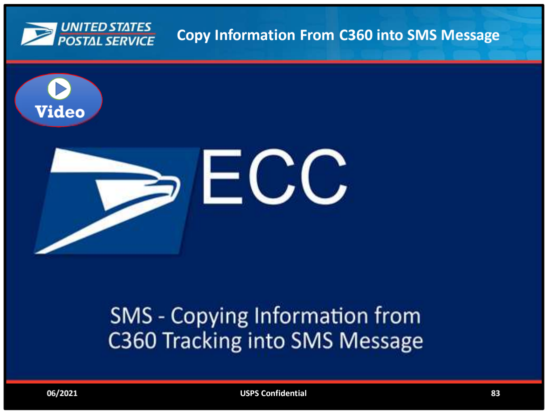
06/2021 USPS Confidential 82

Slide Duration: 1 minute

Instructor Note: This video demonstrates using different response sources, including One Note.

Do

Click to play the video. (Duration: 35 seconds)



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Copy Information From C360 into SMS Message

SMS - Copying Information from C360 Tracking into SMS Message

06/2021 USPS Confidential 83

Slide Duration: 1 minute

Instructor Note: This video demonstrates an Agent copying tracking information from C360 into an SMS message.

Do

Click to play the video. (Duration: 49 seconds)

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Review

Demo

06/2021 USPS Confidential 84

Slide Duration: 30 minutes

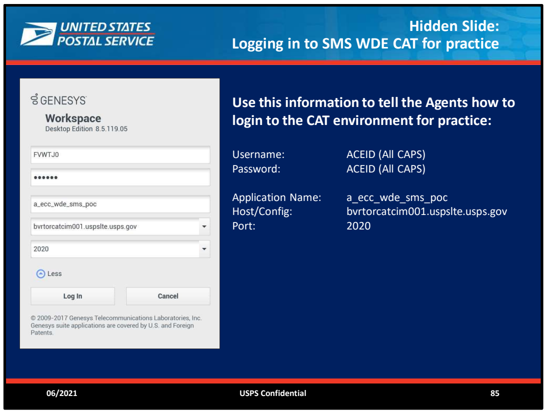
Facilitator's Note: This demonstration will happen in the CAT system. You may need to enlist the help of a co-trainer to help you by acting as the SMS customer. They would be sending live responses using their smartphone so you can reply to them during the demo. The following three hidden slides provide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

Do

Demonstrate Agent view:

- How to do SMS by using the CAT system. Show the C360 steps when they occur, but don't dwell on them. These Agents should already know how to use that system.
- How to find a Business Account in C360 and how add a new Business Contact to that Account.
- How Agents can log off of the SMS channel and log into the Voice channel if WFM or their supervisor needs them to switch tasks.
- Each of the panes of the main SMS window and how they work. Especially show the different ways to sort the Standard Responses and how to switch between the alphabetical and label/folder structure.
- How to hide/show the standard messaging panel (by clicking the vertical bar "Response") so they can restore it if they accidentally hide it.
- How to access the Chat history.
- How to search for the right Standard Response.
- (If you're training Leads, show how to find the lead-specific messages in the Lead Agent folder.)
- How to add a Standard Response to favorites, and then how to find it in favorites again. Tell them that they can't sort favorites, so they may want to limit how many they add.
- How to select a Standard Response and how to edit the placeholders that require it (such as LPO location and hours).
- How to use the message timestamps to identify how long it's been since the customer's last response. Stress that this is an important skill for knowing when/if to send the "are you still there?" messages and when to set the interaction to "Idle".
- Stress that the Agents should NOT wait longer than the approved times for customer responses.
- What a reactivated session looks like. Show previous messages if they are hidden.

Demo transfer to Escalation queue.


UNITED STATES
POSTAL SERVICE
GENESYS
Workspace
Desktop Edition 8.5.119.05
Less
Log In
Cancel

Hidden Slide:
Logging in to SMS WDE CAT for practice

FVWTJ0
••••••
a_ecc_wde_sms_poc
bvrtorcatcim001.uspslte.usps.gov
2020

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Use this information to tell the Agents how to login to the CAT environment for practice:

Username: ACEID (All CAPS)
Password: ACEID (All CAPS)

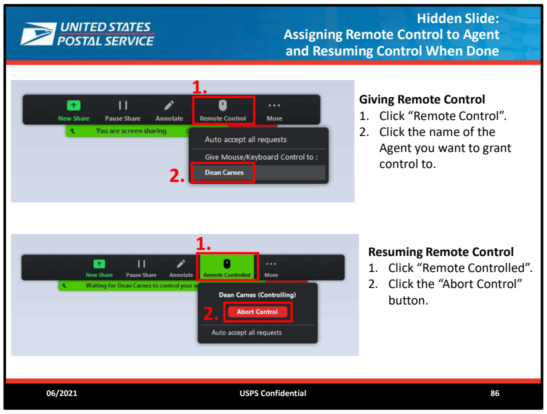
Application Name: a_ecc_wde_sms_poc
Host/Config: bvrtorcatcim001.uspslte.usps.gov
Port: 2020

06/2021 USPS Confidential 85

Hidden Slide

Facilitator Notes: These are the login instructions to share with the Agents for the practice in the training environment:

Username: ACEID (All CAPS)
Password: ACEID (All CAPS)
Application Name: a_ecc_wde_sms_poc
Host/Configuration: bvrtorcatcim001.uspslte.usps.gov
Port: 2020


UNITED STATES
POSTAL SERVICE
1.
New Share
Pause Share
Annotate
Remote Control
More
You are screen sharing
Auto accept all requests
Give Mouse/Keyboard Control to :
2.
Dean Carnes
1.
New Share
Pause Share
Annotate
Remote Controlled
More
Waiting for Dean Carnes to control your s
Dean Carnes (Controlling)
2.
Abort Control
Auto accept all requests

Hidden Slide:
Assigning Remote Control to Agent and Resuming Control When Done

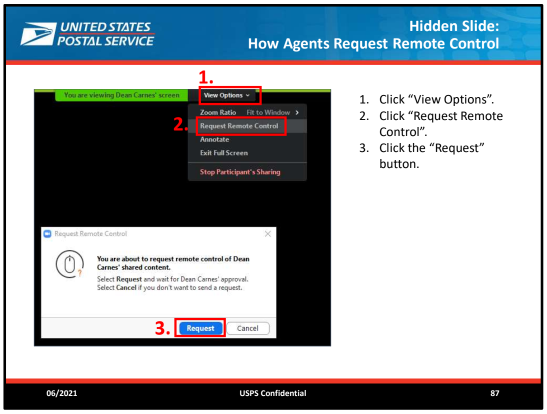
Giving Remote Control
1. Click “Remote Control”.
2. Click the name of the Agent you want to grant control to.

Resuming Remote Control
1. Click “Remote Controlled”.
2. Click the “Abort Control” button.

06/2021 USPS Confidential 86

Hidden Slide

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



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Hidden Slide: How Agents Request Remote Control

1.
You are viewing Dean Carnes' screen
View Options ⌄
Zoom Ratio Fit to Window ›
2.
Request Remote Control
Annotate
Exit Full Screen
Stop Participant's Sharing
Request Remote Control
3.
Request
Cancel

You are about to request remote control of Dean Carnes' shared content.

Select **Request** and wait for Dean Carnes' approval.
Select **Cancel** if you don't want to send a request.

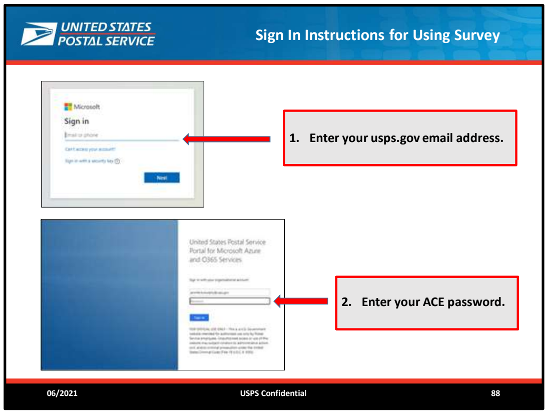
1. Click "View Options".
2. Click "Request Remote Control".
3. Click the "Request" button.

06/2021 USPS Confidential 87

Hidden Slide

Facilitator Note: Use this slide to show how the Agents can request remote control of your screen.

On your side, you'll see a "Grant Control" button. Click that to grant control. Resume Facilitator control by using the instructions on the previous slide.


UNITED STATES
POSTAL SERVICE
Microsoft
Sign in
Next
United States Postal Service Portal for Microsoft Azure and O365 Services

Sign In Instructions for Using Survey

1. Enter your usps.gov email address.

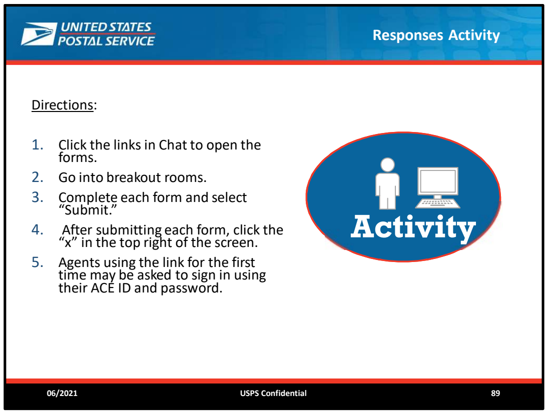
2. Enter your ACE password.

06/2021 USPS Confidential 88

Slide Duration: 1 minute

Facilitator Note: These instructions are for Agents to access and complete the activity on the next slide.

Do
Review the slide.



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Responses Activity

Directions:

1. Click the links in Chat to open the forms.
2. Go into breakout rooms.
3. Complete each form and select "Submit."
4. After submitting each form, click the "x" in the top right of the screen.
5. Agents using the link for the first time may be asked to sign in using their ACE ID and password.

06/2021 USPS Confidential 89

Slide Duration: 1 hour

Instructor Note: There are links to three activities (forms) below. If Agents have time for additional practice, there are extra forms available.
Note: Agents may need to sign into Microsoft to access the document.

Do
Introduce the activity.
Explain to the Agents that they will have 15 mins to complete the activity.
Debrief after each activity.

Use the Standard Responses document to review responses if needed.

Do not send document to Agents.
Advise Agents they may create sticky notes or a One Note document.
Trainers are not to instruct Agents on how to create a One Note document.
If Agents would like to create a One Note document, ask them to seek additional assistance from their supervisor.

Review the instructions on the slide.

Send the following link in Chat and instruct Agents to open the document.
Note: Agents may need to sign into Microsoft to access the document. Screenshots and instructions are on the next slide.

For Event Code Focus set timer for 10 mins.

SMS Activity EvC No Access_Event Code Focus
https://forms.office.com/Pages/ResponsePage.aspx?id=iFeq-TPrSUqK0HYQGRDKw_rdDc67ue9EmYDUfERXJsJUMTU4U1RMU1pTRkhTSlpTRks5RUtLOE04RS4u

SMS Activity EvC NT In Transit_Event Code Focus
https://forms.office.com/Pages/ResponsePage.aspx?id=iFeq-

TPrSUqK0HYQGRDKw_rdDc67ue9EmYDUfERXJsJUNjNSSVZLRFFYMjNYRENWUkFQUTFNSEdHVC4u

For scenarios, set the timer to 15 mins to close the breakout room and return Agents to main room.

SMS Activity 1_Schedule a Redelivery
https://forms.office.com/Pages/ResponsePage.aspx?id=iFeq-TPrSUqK0HYQGRDKw_rdDc67ue9EmYDUfERXJsJUODlUSVFMNDVNUVJSNzBLUkVGRDJWU0ZMOS4u

SMS Activity 2_Create a Service Request
https://forms.office.com/Pages/ResponsePage.aspx?id=iFeq-TPrSUqK0HYQGRDKw_rdDc67ue9EmYDUfERXJsJUMFdMRzg5UjU3TzZJSVBJUTNXQ1dRRjJOVy4u

SMS Activity 3_ Escalation
https://forms.office.com/Pages/ResponsePage.aspx?id=iFeq-TPrSUqK0HYQGRDKw_rdDc67ue9EmYDUfERXJsJUMlI0WDdaVUNIV05JVjI1RVE5RFFTSUMzVi4u

Send Agents to their breakout rooms.

Set the timer to 15 mins to close the breakout room and return Agents to main room.

When Agents return, ask if there are any questions.

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Practice
Activity
06/2021
USPS Confidential
90

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

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

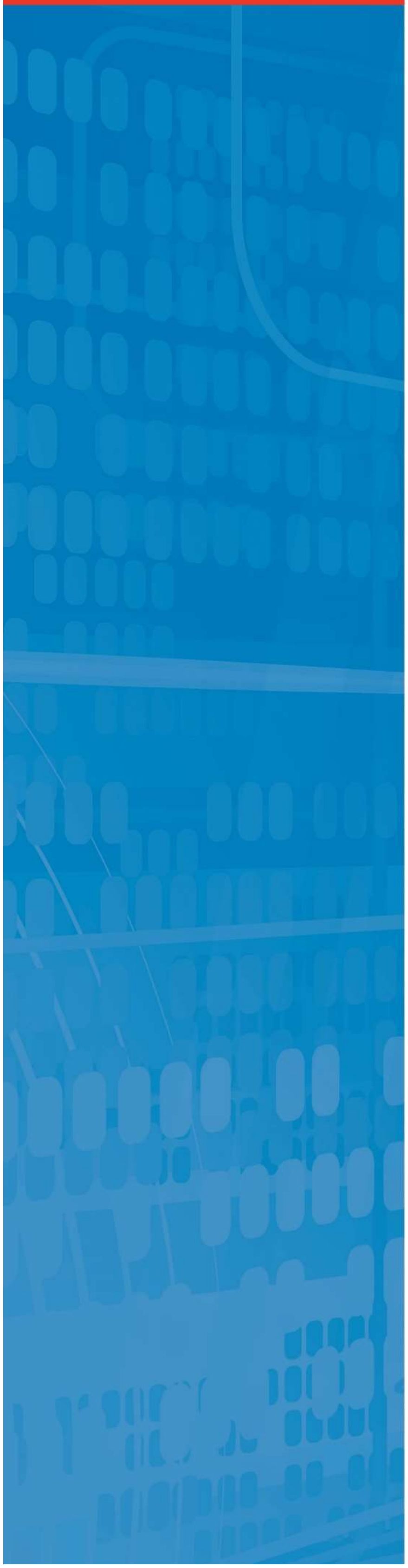
While one instructor is facilitating practice, the other trainer should gather the Supervisors or Lead Agents into a breakout room to conduct their training. At the end of that training, they can return to join this fishbowl, or that trainer can keep them in that breakout room and facilitate practice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

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

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

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

2021



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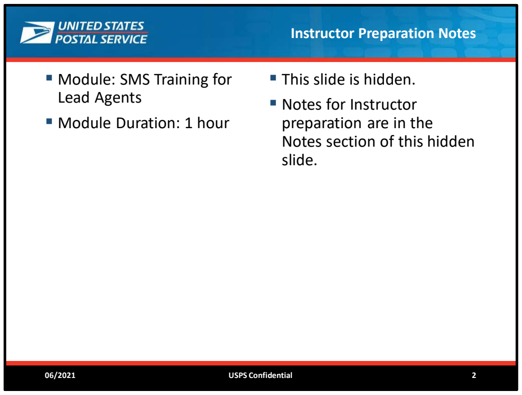
Customer Care Center

SMS Training for Lead Agents

FACILITATOR GUIDE
Courseware Version Date: 06/2021



Instructor Preparation Notes

- Module: SMS Training for Lead Agents
- Module Duration: 1 hour

- This slide is hidden.
- Notes for Instructor preparation are in the Notes section of this hidden slide.

06/2021 USPS Confidential 2

Instructor Materials

- Laptop
- Monitor
- Keyboard Mouse

Learner Materials

- Pen or pencil
- Laptop
- Monitor
- Keyboard Mouse

System Requirements

Zoom

Evaluation

There is no evaluation.

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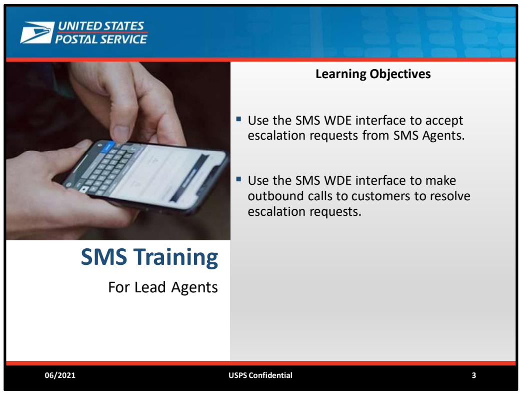

Learning Objectives

- Use the SMS WDE interface to accept escalation requests from SMS Agents.
- Use the SMS WDE interface to make outbound calls to customers to resolve escalation requests.

SMS Training

For Lead Agents

06/2021 USPS Confidential 3

Lesson Duration 1 hour
Slide Duration 1 minutes

Do
Review the learning objectives for the lesson.

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SMS Training for Lead Agents

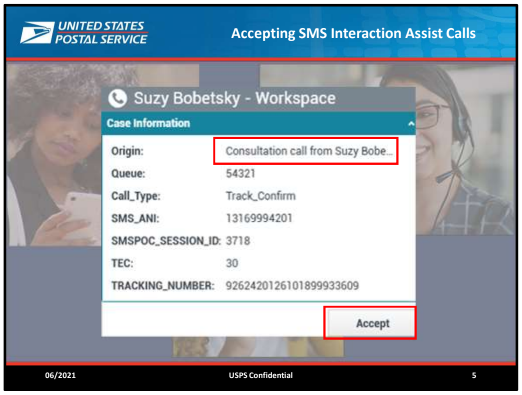
- Handling SMS Interaction Assist Calls
- Handling SMS Interaction Escalations
- Placing Outbound Calls
- Escalating to Supervisors
- Practice

06/2021 USPS Confidential 4

Slide Duration 1 minutes

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

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



Accepting SMS Interaction Assist Calls

Suzy Bobetsky - Workspace

Case Information

Origin: Consultation call from Suzy Bobe...
Queue: 54321
Call_Type: Track_Confirm
SMS_ANI: 13169994201
SMSPOC_SESSION_ID: 3718
TEC: 30
TRACKING_NUMBER: 9262420126101899933609

Slide Duration 2 minutes
2 animations

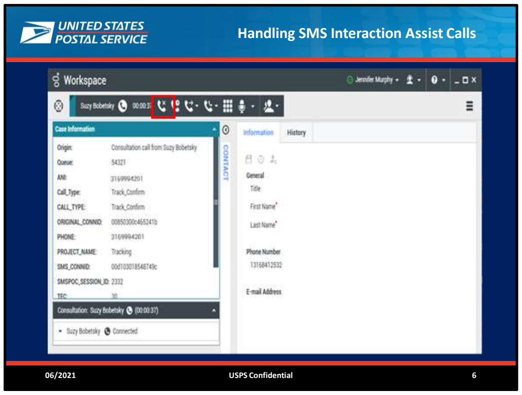
Say
When an Agent needs your assistance during an SMS interaction, they will contact you via voice as they do currently.

Do
Click one time to play animation.

Say
You will receive a WDE notification alerting you to an incoming Assist call. Notice that the notification indicates it is a consultation.
To begin, select the Accept button.

Do
Click one time to play animation.

Facilitator Note: Just as they learned in SMS Agent training, if they happen to miss an interaction invitation, the system will automatically put them into a “Ready (Pending)” status. If this happens, the system won’t offer any more SMS interactions until they go back into full ready. They should keep an eye on the status in WDE. If they see the “half green” icon, make sure they go back into “Ready” for SMS.



Handling SMS Interaction Assist Calls

Origin: Consultation call from Suzy Bobetsky
Queue: 54321
ANI: 3169994201
Call_Type: Track_Confirm
CALL_TYPE: Track_Confirm
ORIGINAL_CONNID: 00850300c465241b
PHONE: 3169994201
PROJECT_NAME: Tracking
SMS_CONNID: 00d103018548749c
SMSPOC_SESSION_ID: 2332
TEC: 30

Consultation: Suzy Bobetsky (00:00:37)
- Suzy Bobetsky Connected

Phone Number
13168412532

UNITED STATES POSTAL SERVICE
Workspace
Jennifer Murphy
Suzy Bobetsky
00:00:3
Case Information
CONTACT
Information
History
General
Title
First Name*
Last Name*
E-mail Address

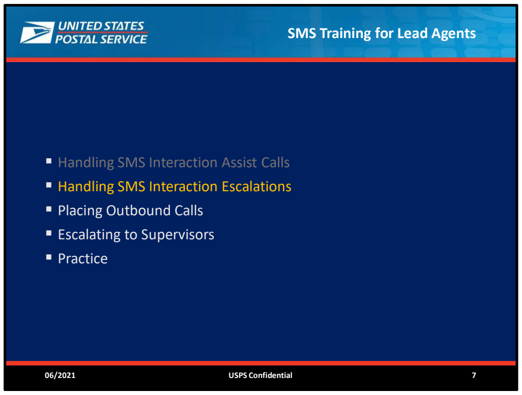
06/2021 USPS Confidential 6

Slide Duration 2 minutes
1 animation

Say
Use your existing resources to answer any questions the Agent may have. Note that you do not have access to the SMS chat history, or to directly message during the consultation.

At the end of the assist call, when you have addressed all of the Agent’s questions, ask the Agent to disconnect the call. If needed, you may disconnect the call using the toolbar at the top of the WDE window.

Do
Click one time to play animation.

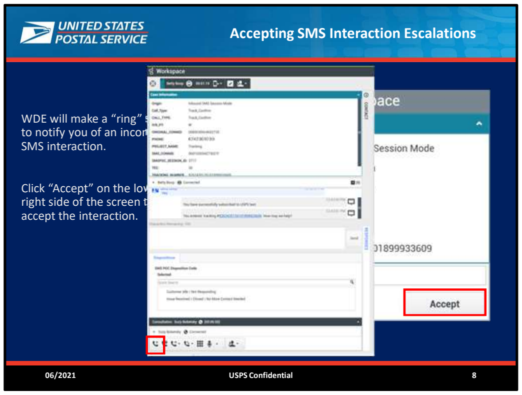


UNITED STATES POSTAL SERVICE
SMS Training for Lead Agents

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

06/2021
USPS Confidential
7

Slide Duration 1 minute



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Accepting SMS Interaction Escalations

WDE will make a “ring” s
to notify you of an incon
SMS interaction.

Click “Accept” on the low
right side of the screen t
accept the interaction.

06/2021 USPS Confidential 8

Slide Duration 3 minutes
2 animations

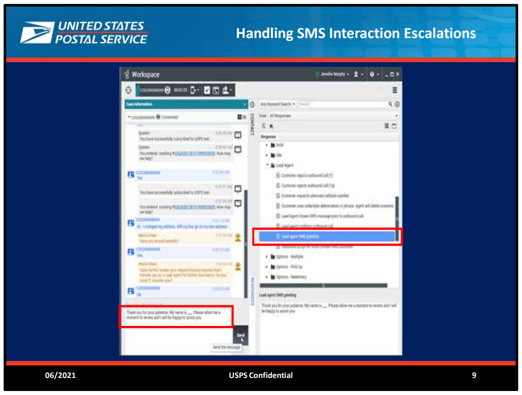
Say
If Agents need to escalate an SMS interaction, they will first contact you via phone similar to an Assist queue call to give you the background of the interaction and issue requiring the escalation.

During the call, the Agent will transfer the SMS interaction to you. You will receive an interaction transfer request. Click the Accept button to view the SMS interaction.

Do
Click one time to play the animation.

Say
After the Agent has explained the customer’s situation and you are ready to take over the SMS interaction, ask the Agent to disconnect the voice call. If needed, you may disconnect the voice call using the toolbar that displays at the bottom of the WDE window.

Do
Click one time to play the animation.



Handling SMS Interaction Escalations

06/2021 USPS Confidential 9

Slide Duration 2 minutes
1 animation

Say

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

Do

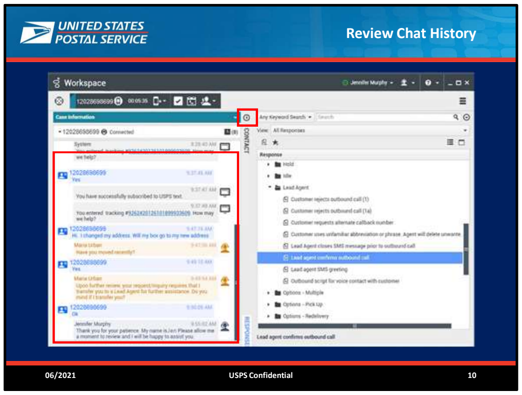
Click one time to play animation.
Read the Lead Agent SMS greeting standard response: “Thank you for your patience. My name is ___. Please allow me a moment to review and I will be happy to assist you.”

Say

Be sure to modify the Standard Response to include your name. Also, note that the Lead Agent greeting standard responses asks the customer to allow you a moment to review the chat history. If needed, take a moment to quickly review the chat history **after** you greet the customer.

Do

Emphasize that Leads must first acknowledge the customer before spending time reviewing the chat history.
Remind Agents that the previous Agent’s message font color will change to orange as this is a transferred SMS interaction.



UNITED STATES POSTAL SERVICE

Review Chat History

Workspace
Jennifer Murphy
12028698699
00:05:35
Case Information
12028698699 Connected
CONTACT
RESPONSE
Any Keyword Search
Search
View: All Responses
Response
Hold
Idle
Lead Agent
Customer rejects outbound call (1)
Customer rejects outbound call (1a)
Customer requests alternate callback number
Lead Agent closes SMS message prior to outbound call
Lead agent confirms outbound call
Lead agent SMS greeting
Outbound script for voice contact with customer
Options - Multiple
Options - Pick Up
Options - Redelivery
Lead agent confirms outbound call

12028698699: Yes

You have successfully subscribed to USPS text.

12028698699: Hi. I changed my address. Will my box go to my new address

Maria Urban: Have you moved recently?

12028698699: Yes

Maria Urban: Upon further review, your request/inquiry requires that I transfer you to a Lead Agent for further assistance. Do you mind if I transfer you?

12028698699: Ok

Jennifer Murphy: Thank you for your patience. My name is Jen. Please allow me a moment to review and I will be happy to assist you.

06/2021 USPS Confidential 10

Slide Duration 2 minutes

1 animation

Say

The SMS interaction chat history will be forwarded to you in the Active SMS panel during the escalation transfer.

Recall that to expand the panel, you can collapse the Contact panel by clicking the arrow.

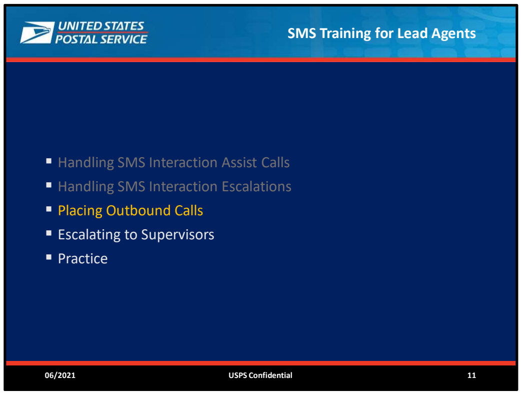
Do

Click one time to display 2nd highlight box.

Emphasize that while reviewing the SMS chat history is helpful, Agents should NOT solely rely on these communications. Instead, Agents should verify all past actions (e.g., service requests) in C360.

Say

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



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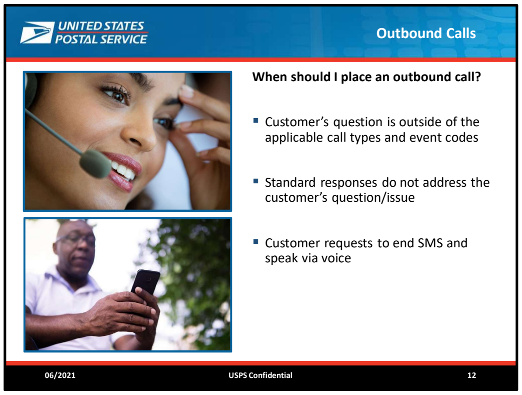
SMS Training for Lead Agents

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

06/2021 USPS Confidential 11

Slide Duration 1 minute



Outbound Calls

When should I place an outbound call?

- Customer's question is outside of the applicable call types and event codes
- Standard responses do not address the customer's question/issue
- Customer requests to end SMS and speak via voice

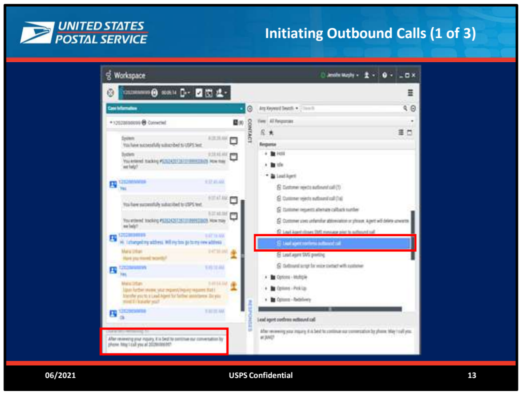
06/2021 USPS Confidential 12

Slide Duration 2 minutes
3 animations

Say
There may be instances when you must transition an SMS interaction to a voice call to fully address customer's questions.

Do
Click 3 times to display each main bullet
Read or ask for a volunteer to read the bullets on slide

Facilitator Note:
Emphasize that outbound calls must only be placed for current SMS interactions, and only Lead Agents may place outbound calls. Lead Agents should not advise Agents to place an outbound call.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Initiating Outbound Calls (1 of 3)

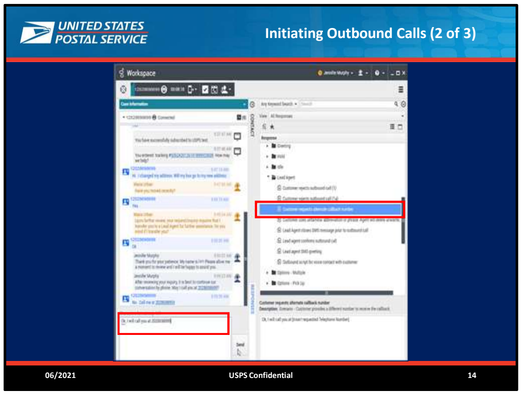
06/2021 USPS Confidential 13

Slide Duration 2 minutes
1 animation

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

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

Do
Click one time to play animation.
Read the Lead agent confirms outbound call standard response: "After reviewing your inquiry, it is best to continue our conversation by phone. May I call you at [ANI]?"
Remind Agents to populate the customer's phone number in the standard response before sending.



Initiating Outbound Calls (2 of 3)

06/2021 USPS Confidential 14

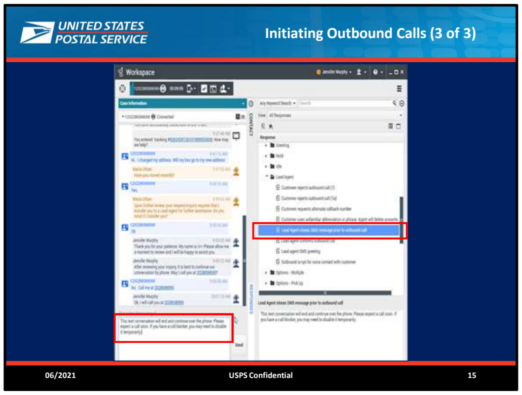
Slide Duration 2 minutes
1 animation

Say

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

Do

Click one time to play animation.
Read the Customer requests alternate callback number standard response: “Ok. I will call you at [insert requested Telephone Number].”
Remind Agents to populate the customer’s preferred phone number in the standard response before sending.



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Initiating Outbound Calls (3 of 3)

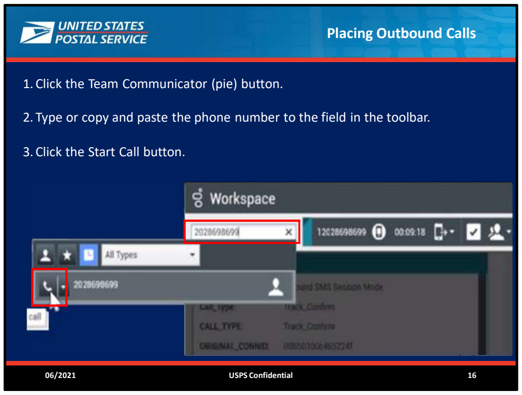
06/2021 USPS Confidential 15

Slide Duration 2 minutes
1 animation

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

Once the customer has agreed for you to call the customer, signal the end to the chat interaction using another standard response, but do NOT disposition or close the SMS interaction at this time.

Do
Click one time to play animation.
Read the Lead agent closes SMS message prior to outbound call standard response: “This text conversation will end and continue over the phone. Please expect a call soon. If you have a call blocker, you may need to disable it temporarily.”



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Placing Outbound Calls

1. Click the Team Communicator (pie) button.
2. Type or copy and paste the phone number to the field in the toolbar.
3. Click the Start Call button.

Workspace
2028698699
12028698699
00:09:18
All Types
2028698699
call
CALL_TYPE: Track_Confirm

06/2021 USPS Confidential 16

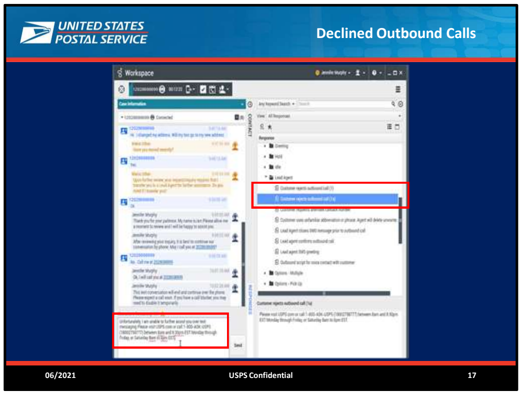
Slide Duration 3 minutes
3 animations

Do

Review the steps to place an outbound call.
Click 3 times to display the highlights for the steps.

Say

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



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Declined Outbound Calls

06/2021 USPS Confidential 17

Slide Duration 2 minutes
1 animation

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

Do
Click one time to play animation.
Read the Customer rejects outbound call 1 and 1a standard responses: “Unfortunately, I am unable to further assist you over text messaging. Please visit USPS.com or call 1-800-ASK-USPS (18002758777) between 8am and 8:30pm EST Monday through Friday, or Saturday 8am to 6pm EST.”

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

UNITED STATES POSTAL SERVICE
06/2021
USPS Confidential
18

Outbound Calls: Opening Script

Good (morning, afternoon, evening). My name is [Agent Name], a lead agent with the United States Postal Service.
I am following up on our recent text interaction.

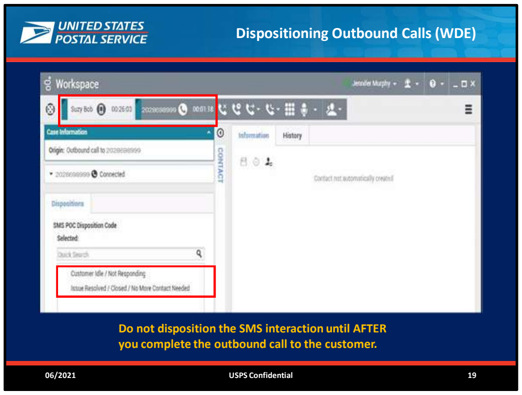
Slide Duration 3 minutes
1 animation

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

When you have to place an outbound call, you must use this opening script instead.

Do
Click one time to play animation.
Ask for a participant to read the call opening script for outbound calls.

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



UNITED STATES POSTAL SERVICE

Dispositioning Outbound Calls (WDE)

Workspace
Jennifer Murphy
Suzy Bob
00:26:03
00:01:18
Case Information
Origin: Outbound call to
Connected
CONTACT
Information
History
Contact not automatically created
Dispositions
SMS POC Disposition Code
Selected:
Quick Search
Customer Idle / Not Responding
Issue Resolved / Closed / No More Contact Needed

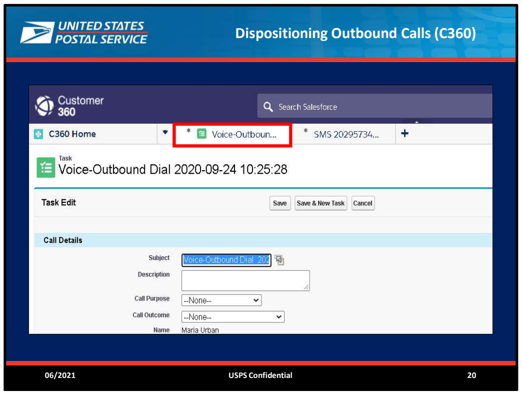
Do not disposition the SMS interaction until AFTER
you complete the outbound call to the customer.

06/2021 USPS Confidential 19

Slide Duration 2 minutes
1 animation

Say
After you complete the outbound call, you must disposition the SMS interaction using the options provided.

Do
Click one time to play the animation.
Emphasize that this is accomplished from the SMS interaction tab, which should display next to the Voice tab at the top of the WDE window.


UNITED STATES POSTAL SERVICE
Customer 360
Search Salesforce
C360 Home
Voice-Outboun...
SMS 20295734...
Save
Save & New Task
Cancel

Dispositioning Outbound Calls (C360)

Task
Voice-Outbound Dial 2020-09-24 10:25:28

Task Edit

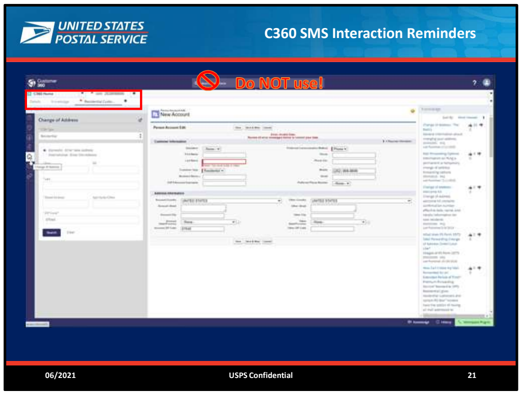
Call Details

Subject: Voice-Outbound Dial 202
Description:
Call Purpose: --None--
Call Outcome: --None--
Name: Maria Urban

06/2021 USPS Confidential 20

Slide Duration 2 minutes

Say
After you disposition the SMS interaction in WDE, C360 will prompt you to disposition the outbound voice interaction.



UNITED STATES POSTAL SERVICE

C360 SMS Interaction Reminders

Do NOT use!

06/2021 USPS Confidential 21

Slide Duration 2 minutes
1 animation

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

Do
Click one time to play animation.

Say
Also, do not use the Global Search feature.

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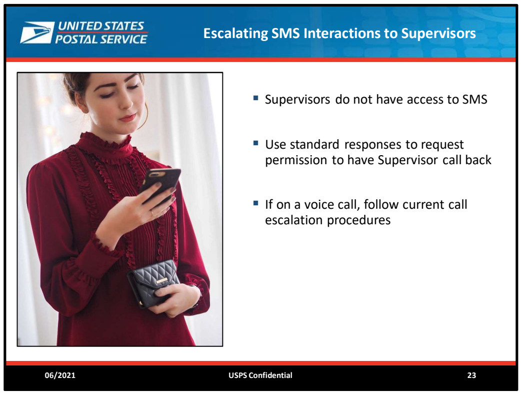
SMS Training for Lead Agents

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

06/2021 USPS Confidential 22

Slide Duration 1 minute



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Escalating SMS Interactions to Supervisors

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

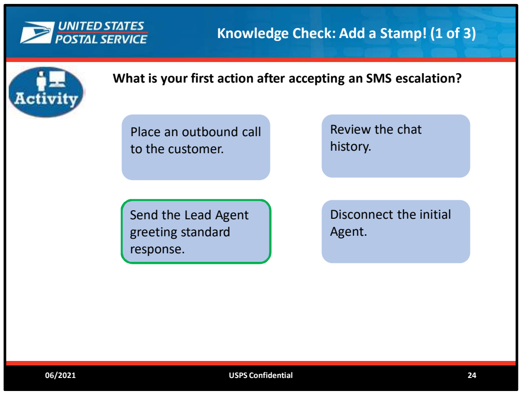
06/2021 USPS Confidential 23

Slide Duration 2 minutes

Say

Keep in mind that Supervisors do not have SMS access, so you cannot transfer an SMS interaction to a Supervisor. If needed, use your standard responses to request permission to have a Supervisor call the customer back and end the interaction accordingly.

If a customer requests to speak to a Supervisor during an outbound call, follow current call escalation procedures.


UNITED STATES POSTAL SERVICE

Knowledge Check: Add a Stamp! (1 of 3)

Activity

What is your first action after accepting an SMS escalation?

- Place an outbound call to the customer.
- Review the chat history.
- Send the Lead Agent greeting standard response.
- Disconnect the initial Agent.

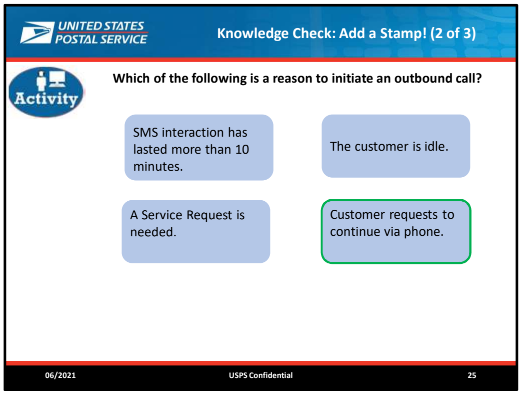
06/2021 USPS Confidential 24

Slide Duration 2 minutes
1 animation

Do

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

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



UNITED STATES POSTAL SERVICE

Knowledge Check: Add a Stamp! (2 of 3)

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

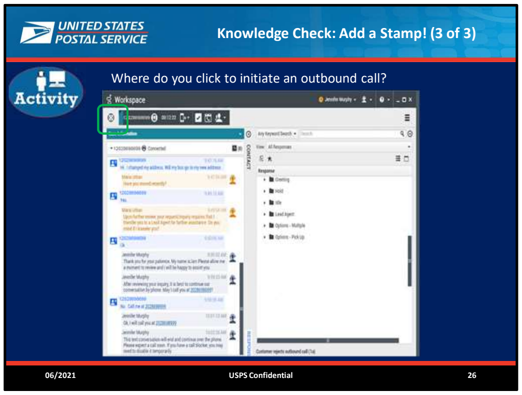
- SMS interaction has lasted more than 10 minutes.
- The customer is idle.
- A Service Request is needed.
- Customer requests to continue via phone.

06/2021 USPS Confidential 25

Slide Duration 2 minutes
1 animation

Do
Tell Agents to select the correct answer using the annotation tool.

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



Knowledge Check: Add a Stamp! (3 of 3)

Activity

Where do you click to initiate an outbound call?

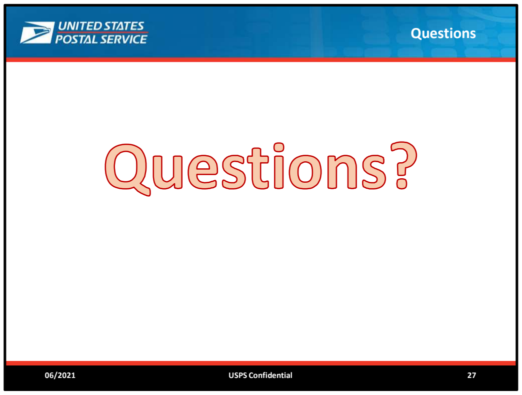
06/2021 USPS Confidential 26

Slide Duration 2 minutes
1 animation

Do

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

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



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Questions

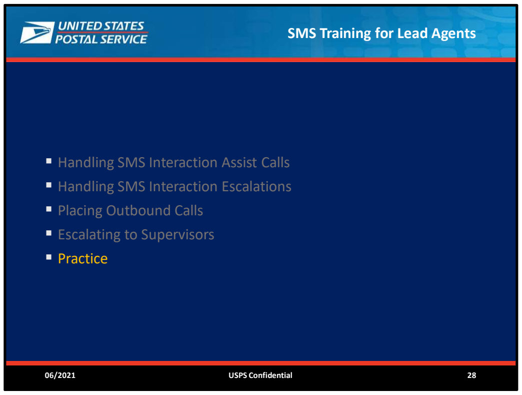
Questions?

06/2021 USPS Confidential 27

Slide Duration 5 minutes

Do
Invite Agents to post questions in Zoom Chat.

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



UNITED STATES POSTAL SERVICE

SMS Training for Lead Agents

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

06/2021 USPS Confidential 28

Slide Duration 2 minutes

Do

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

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Demo

Demo

06/2021 USPS Confidential 29

Slide Duration 15 minutes

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

Do

Demonstrate receipt/acceptance of a transferred SMS interaction
Demonstrate Lead Agent standard response folder: greetings
Demonstrate review of previous Agent's SMS exchanges (chat history)
Demonstrate standard response flow to initiate an outbound call, include verification of phone number and placing a call to number different than the customer called from
Demonstrate steps to place an outbound call
Demonstrate/emphasize the need for CTY for an outbound call
Demonstrate dispositioning SMS interaction AFTER outbound call

Practice

Activity

06/2021 USPS Confidential 30

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

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

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

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

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

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

Good Morning!

Welcome to SMS Training for Agents and Leads

Trainers:

IMPORTANT NOTE:
Only use your Postal Webmail Account on your Postal Issued Laptop to communicate with Supervisors, Managers and HR.

1. Log in to WDE and Shift Prep at 10am (not before).
2. Switch to Nesting at 10:10.
3. Please check your emails for messages from your supervisor or site management.
4. Please check announcements in C360.

Going to Break or Lunch?

1. Mute yourself.
2. Mark yourself as AWAY in Zoom.
3. Switch to BREAK or LUNCH in WDE.

Welcome Back!

Have you switched WDE back to Training?
Check clapping hands
that you are back and Switched your phone!

UNITED STATES
POSTAL SERVICE
Customer Care Center

SMS Training for Agents

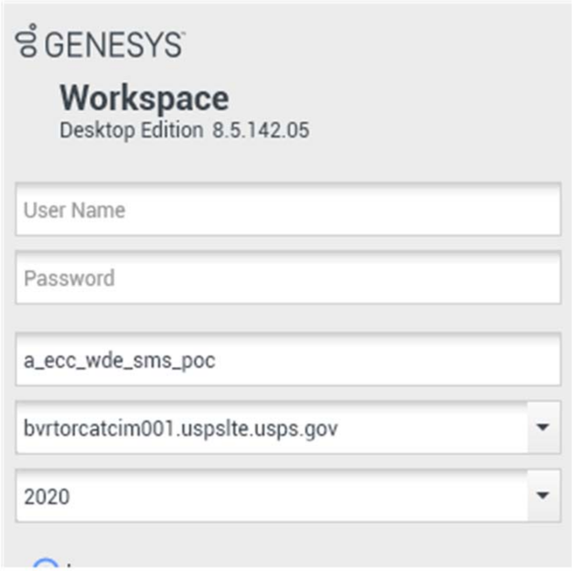
Instructor Preparation Notes

- Course: SMS Training for Agents
- Lesson Duration:
  5 hours, plus practice

- Note to Trainers:
- Be certain that agents have only **ONE C360** session open.

- This slide is hidden.
- Notes for Instructor preparation are in the Notes section of this hidden slide.

02.05.21 Provided by Richard Brown
User Name: ACE ID (Caps)
Password: ACE ID (Caps)



GENESYS
Workspace
Desktop Edition 8.5.142.05

User Name
Password
a_ecc_wde_sms_poc
bvrtorcatcim001.uspslte.usps.gov
2020

VILT Orientation

UNITED STATES
POSTAL SERVICE

SMS Training

For Agents

Learning Objectives

After completing this training, you will be able to:

- Sign into SMS WDE
- Select SMS WDE Standard messaging
- Understand how SMS and C360 are linked
- Use SMS WDE tools and C360 to assist up to three customers at a time according to the SMS QSDD Guidelines
- Select Disposition Codes in SMS interactions
- Access Lead Assist and Escalate to Leads

SMS as a Channel

SMS (Short Message Service)

Text messaging with a mobile phone.

Customers meeting the following criteria will be offered to continue their inquiry with SMS:

- Call 800-275-8777
- Using an iPhone or Android AND
- Meet the other criteria

What is SMS About?

It's about offering our customers options that meet their needs.

Time is important to our customers!

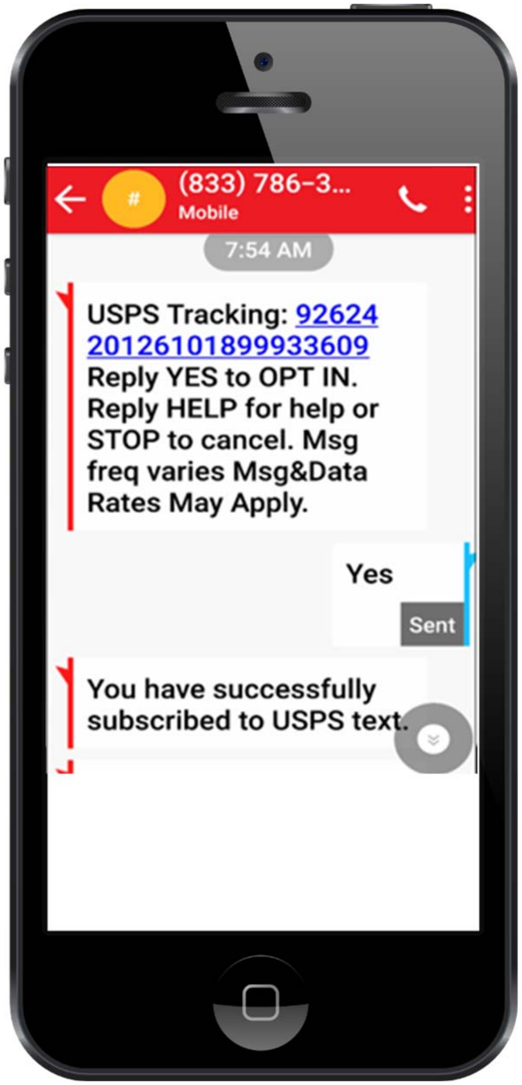
- Reduced wait times in the IVR
- Provides customer-friendly support
- Convenient for our customers

SMS allows our customers more flexibility.

What Will We Cover in This Course?

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

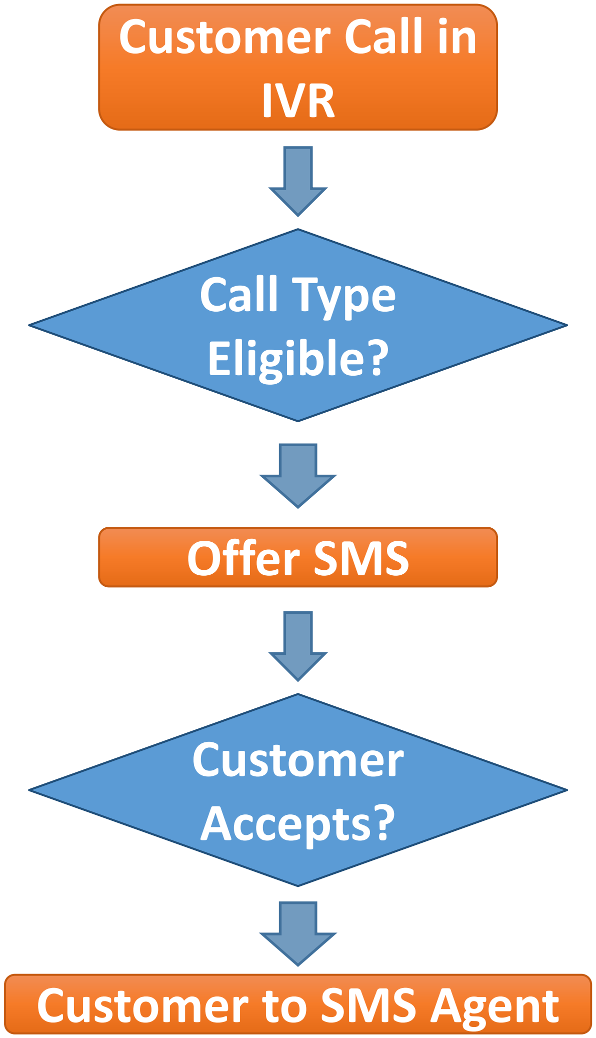
Which Customers Get SMS Invitations?



USPS Tracking: 92624 20126101899933609 Reply YES to OPT IN. Reply HELP for help or STOP to cancel. Msg freq varies Msg&Data Rates May Apply.

Yes

You have successfully subscribed to USPS text.



Customer Call in IVR

Call Type Eligible?

Offer SMS

Customer Accepts?

Customer to SMS Agent

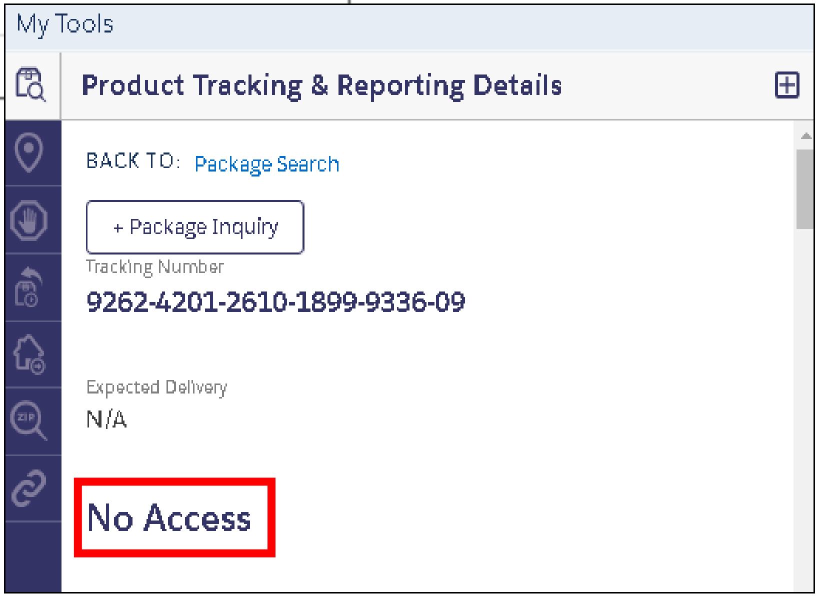
Simplified SMS offer diagram

SMS Call Type Triggers

Calls with eligible call types will be offered an SMS invitation.

Sample Eligible Scan Events

30	No Access	**54**	Receptacle Full/Item Oversized
55	No Secure Location	**73**	Available for Redelivery or Pickup
56	No Authorized Recipient Available	**02**	Notice Left
VR	Redelivery Scheduled	**01**	Delivered
DX	Delivery Status Not Updated	**NT**	In Transit


My Tools
Product Tracking & Reporting Details
+ Package Inquiry

BACK TO: Package Search

Tracking Number
9262-4201-2610-1899-9336-09

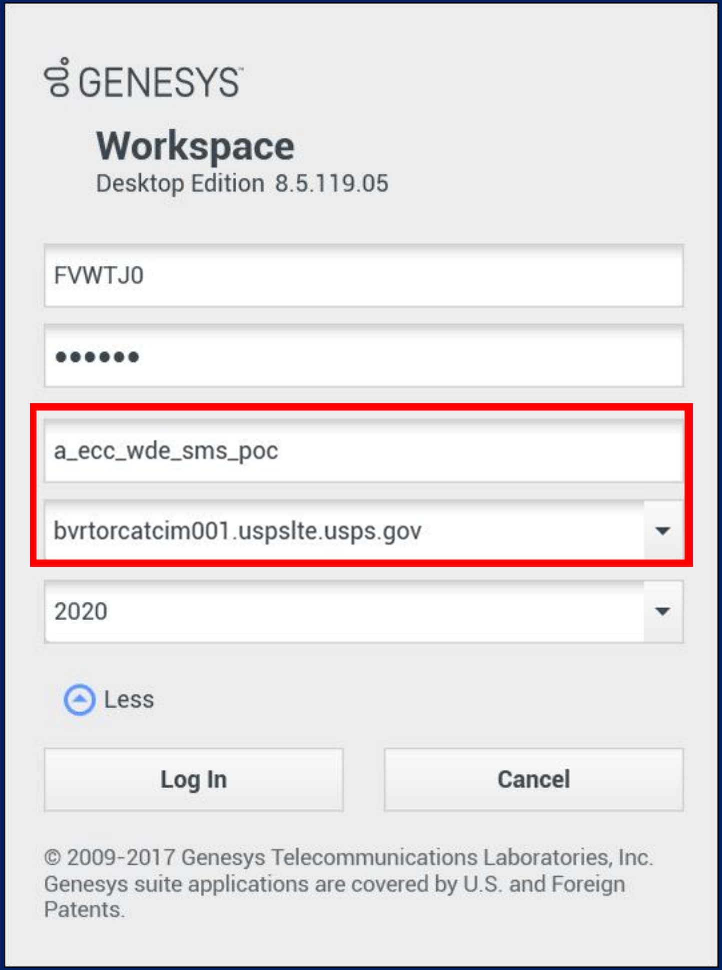
Expected Delivery
N/A

No Access

What’s Next?

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

Logging in to SMS WDE



Workspace

Desktop Edition 8.5.119.05

FVWTJ0

••••••

a_ecc_wde_sms_poc

bvrtorcatcim001.uspslte.usps.gov

2020

© 2009-2017 Genesys Telecommunications Laboratories, Inc. Genesys suite applications are covered by U.S. and Foreign Patents.

You will be using a different application name for the SMS Project.

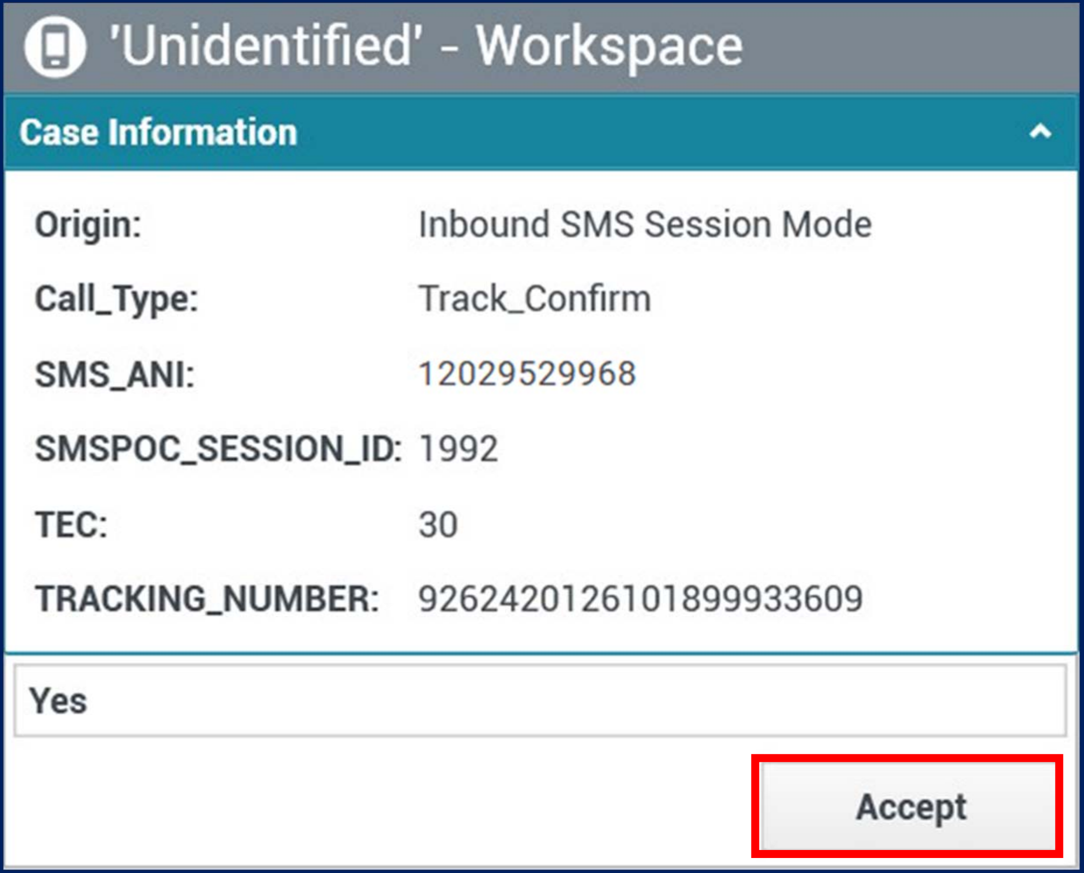
The rest of the log in is the same as usual.

UNITED STATES POSTAL SERVICE

Starting the SMS Interaction

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

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


'Unidentified' - Workspace
Case Information

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

Yes

Accept

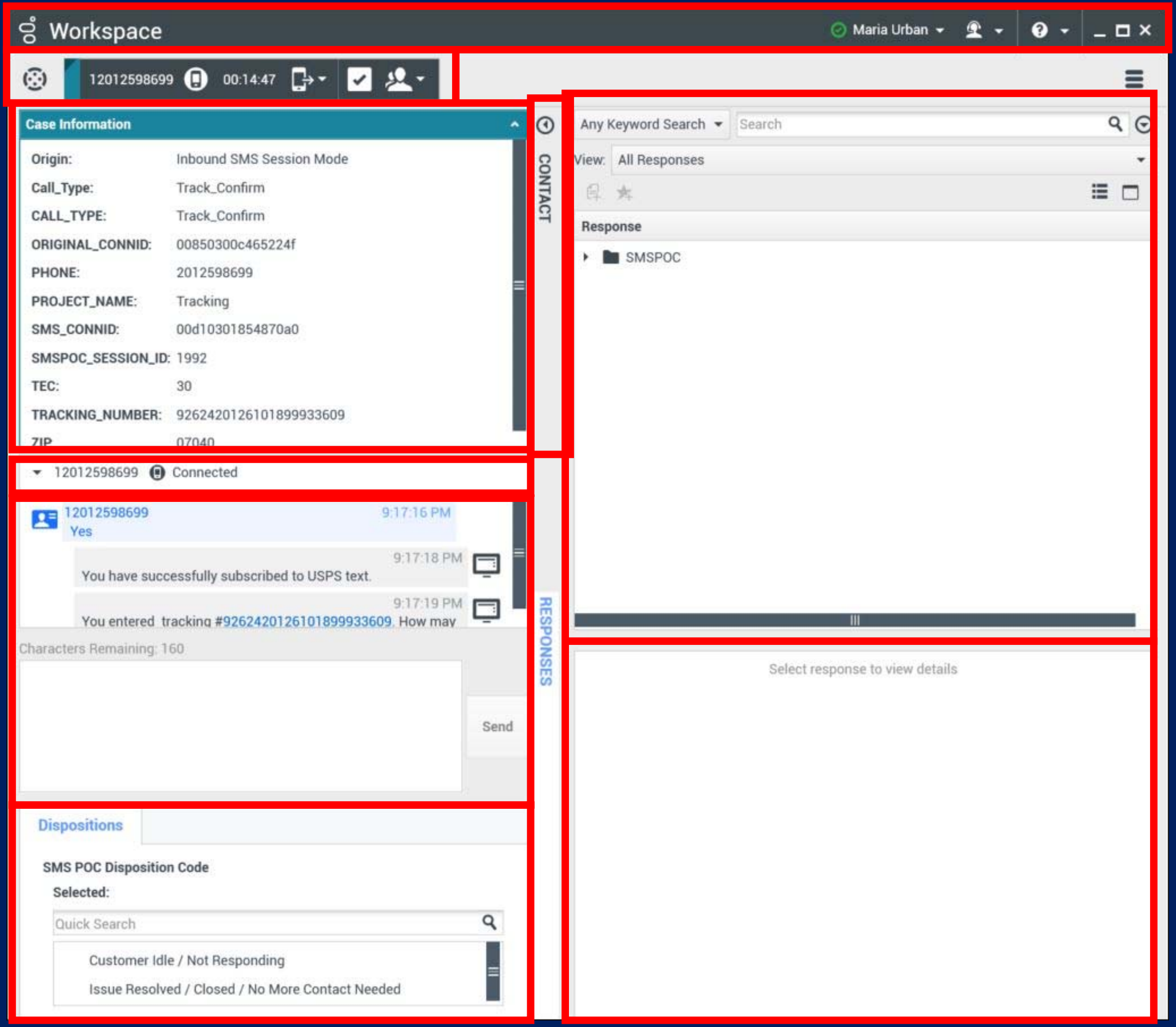
Video: Handling Incoming Interaction

Video

ECC

SMS - Handling an
Incoming Interaction

Parts of SMS Interaction Window


Workspace
Maria Urban
12012598699
00:14:47
CONTACT
RESPONSES
Any Keyword Search
Search
View:
All Responses
Response
SMSPOC
Select response to view details
Send
Dispositions
SMS POC Disposition Code
Selected:
Quick Search

Case Information

Origin:	Inbound SMS Session Mode
Call_Type:	Track_Confirm
CALL_TYPE:	Track_Confirm
ORIGINAL_CONNID:	00850300c465224f
PHONE:	2012598699
PROJECT_NAME:	Tracking
SMS_CONNID:	00d10301854870a0
SMSPOC_SESSION_ID:	1992
TEC:	30
TRACKING_NUMBER:	9262420126101899933609
ZIP	07040

12012598699 Connected

12012598699 9:17:16 PM
Yes

9:17:18 PM
You have successfully subscribed to USPS text.

9:17:19 PM
You entered tracking #9262420126101899933609. How may

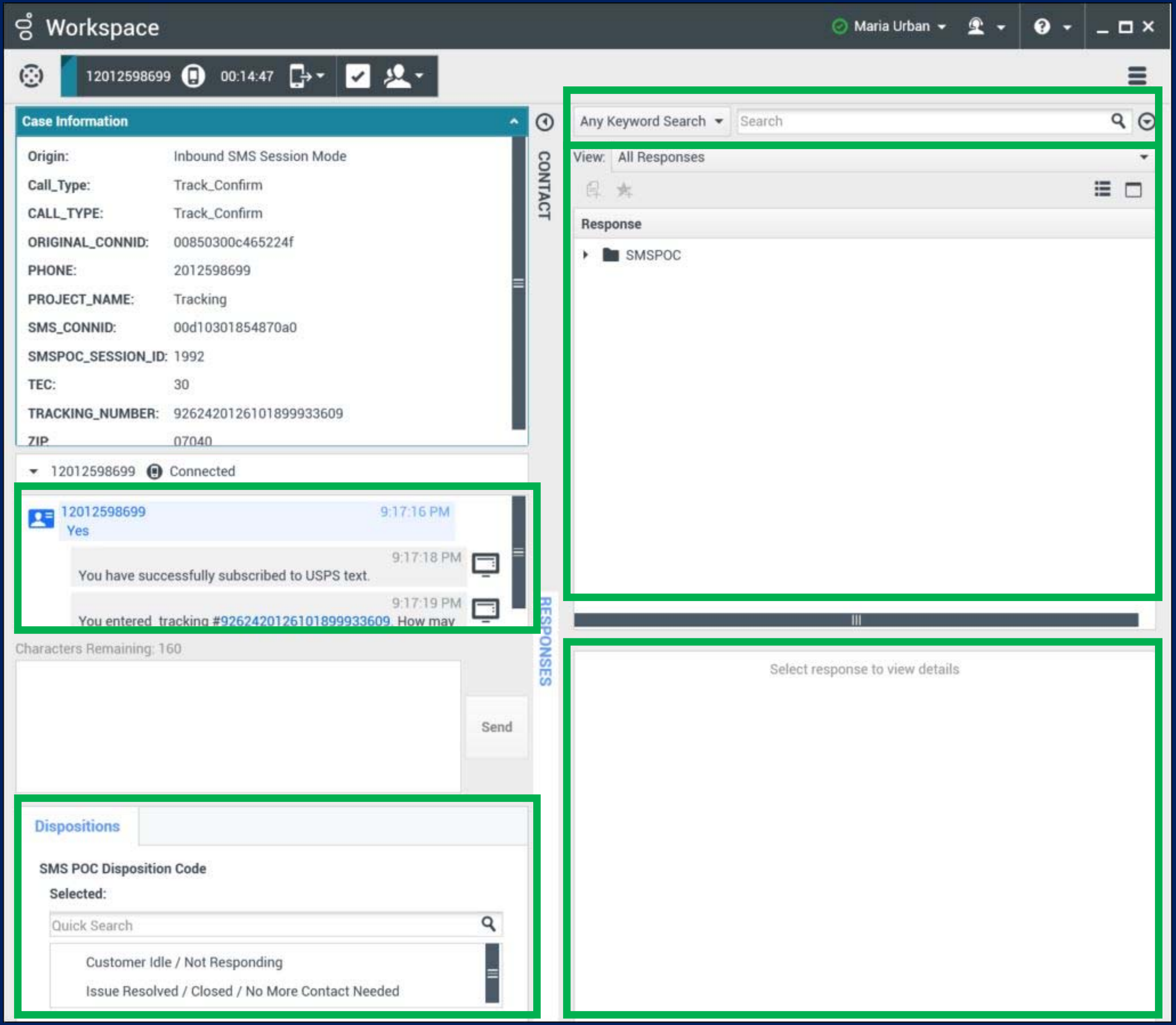
Characters Remaining: 160

Customer Idle / Not Responding
Issue Resolved / Closed / No More Contact Needed

UNITED STATES POSTAL SERVICE

Knowledge Check: Add a Stamp!

Activity


Workspace
Maria Urban
12012598699
00:14:47
CONTACT
RESPONSES
Any Keyword Search
Search
View: All Responses
Response
SMSPOC
Select response to view details
Send
Dispositions
Quick Search

Case Information

Origin: Inbound SMS Session Mode
Call_Type: Track_Confirm
CALL_TYPE: Track_Confirm
ORIGINAL_CONNID: 00850300c465224f
PHONE: 2012598699
PROJECT_NAME: Tracking
SMS_CONNID: 00d10301854870a0
SMSPOC_SESSION_ID: 1992
TEC: 30
TRACKING_NUMBER: 9262420126101899933609
ZIP: 07040

12012598699 Connected

12012598699 9:17:16 PM
Yes

9:17:18 PM
You have successfully subscribed to USPS text.

9:17:19 PM
You entered tracking #9262420126101899933609. How may

Characters Remaining: 160

SMS POC Disposition Code
Selected:

Customer Idle / Not Responding
Issue Resolved / Closed / No More Contact Needed

Video: Handling An SMS Interaction

Video

ECC

Knowledge Nudge

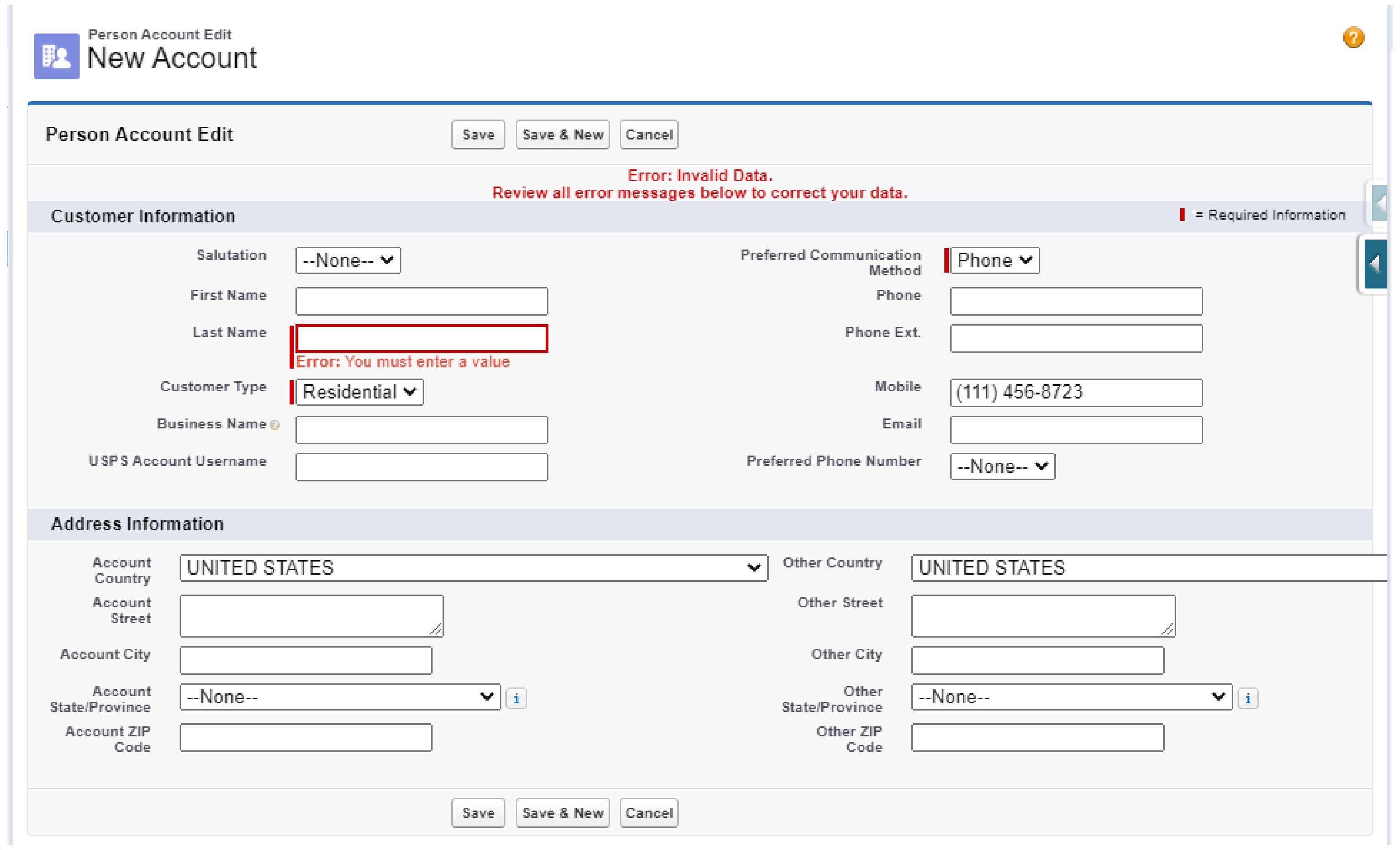
Handling An SMS Interaction

What's Next?

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

Starting the SMS Interaction in C360
Customer NOT Recognized

- If the customer doesn't have an account, then the new account page will appear so you can create one.



Person Account Edit
New Account
Person Account Edit
Save
Save & New
Cancel

Error: Invalid Data.
Review all error messages below to correct your data.

Customer Information

= Required Information

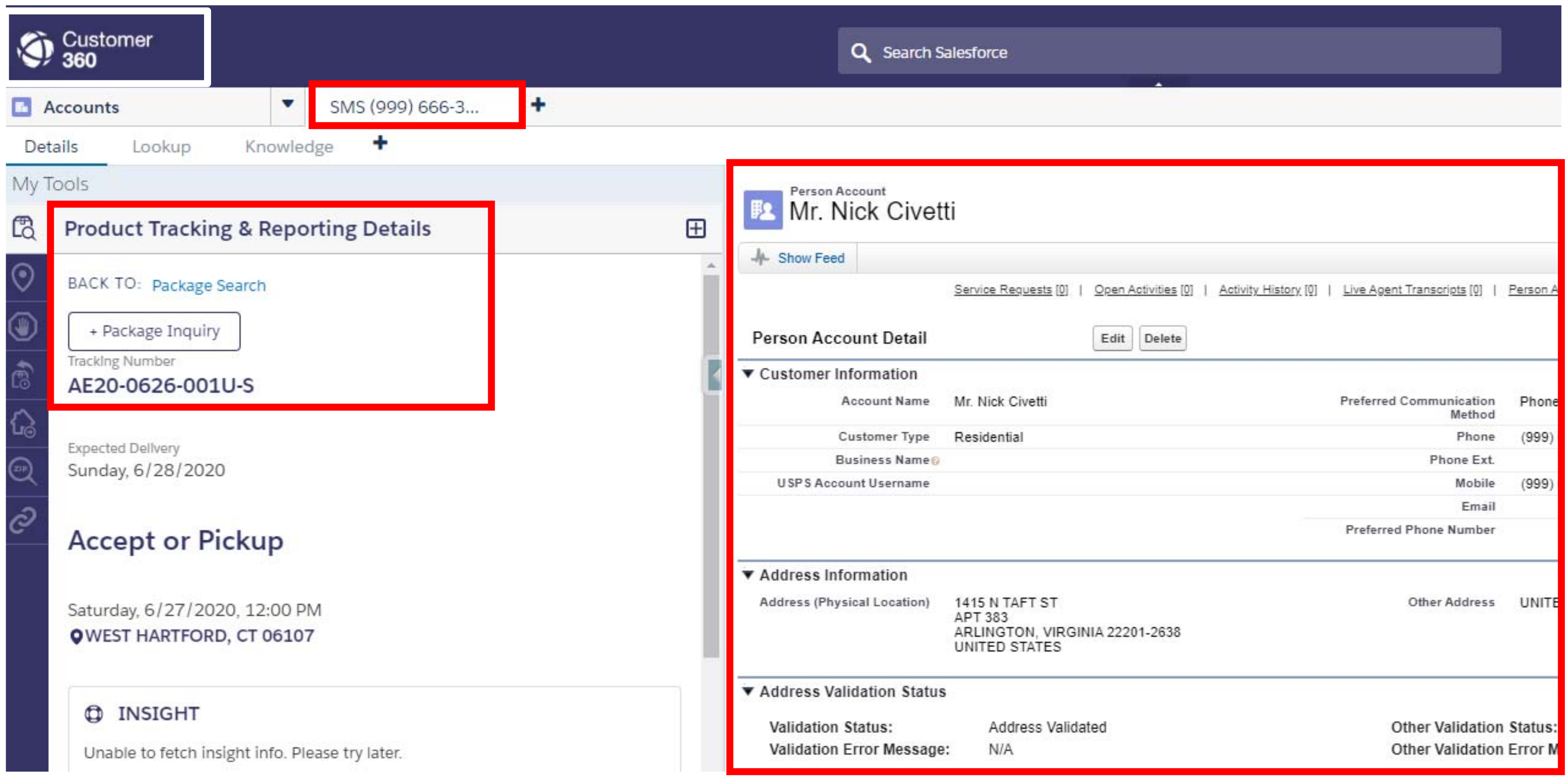
Salutation	--None--	Preferred Communication Method	Phone
First Name		Phone	
Last Name	Error: You must enter a value	Phone Ext.	
Customer Type	Residential	Mobile	(111) 456-8723
Business Name		Email	
USPS Account Username		Preferred Phone Number	--None--

Address Information

Account Country	UNITED STATES	Other Country	UNITED STATES
Account Street		Other Street	
Account City		Other City	
Account State/Province	--None--	Other State/Province	--None--
Account ZIP Code		Other ZIP Code	

Save
Save & New
Cancel

C360 SMS Interaction: Existing Residential Customers


Customer 360
Search Salesforce
Accounts
SMS (999) 666-3...
Details
Lookup
Knowledge
My Tools
Show Feed
Edit
Delete
+ Package Inquiry

Product Tracking & Reporting Details

BACK TO: Package Search

Tracking Number
AE20-0626-001U-S

Expected Delivery
Sunday, 6/28/2020

Accept or Pickup

Saturday, 6/27/2020, 12:00 PM
WEST HARTFORD, CT 06107

INSIGHT
Unable to fetch insight info. Please try later.

Person Account
Mr. Nick Civetti

Service Requests [0] | Open Activities [0] | Activity History [0] | Live Agent Transcripts [0] | Person A

Person Account Detail

Customer Information

Account Name	Mr. Nick Civetti	Preferred Communication Method	Phone
Customer Type	Residential	Phone	(999)
Business Name		Phone Ext.	
USPS Account Username		Mobile	(999)
		Email	
		Preferred Phone Number	

Address Information

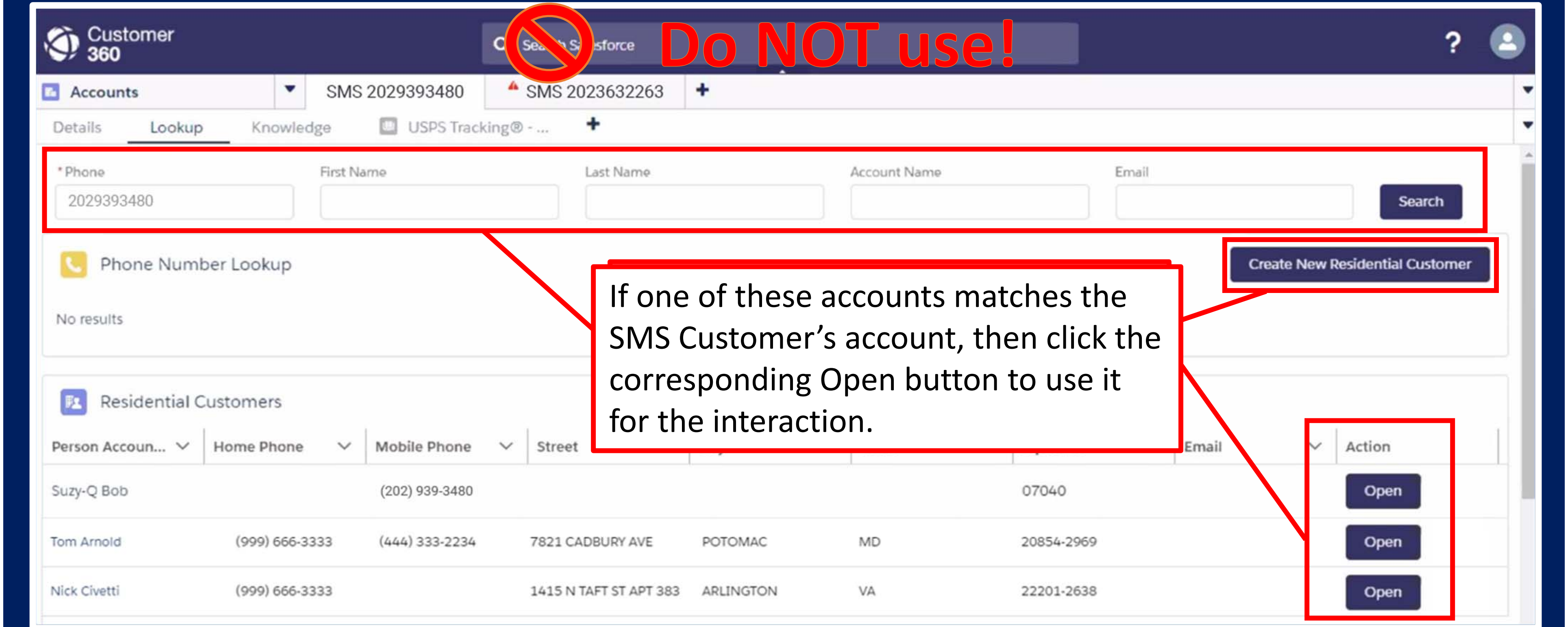
Address (Physical Location)
1415 N TAFT ST
APT 383
ARLINGTON, VIRGINIA 22201-2638
UNITED STATES

Other Address: UNITE

Address Validation Status

Validation Status: Address Validated
Validation Error Message: N/A
Other Validation Status:
Other Validation Error M

Starting the SMS Interaction in C360
Multiple Customer Matches



Customer 360
Search Salesforce
?
Accounts
SMS 2029393480
SMS 2023632263
Details
Lookup
Knowledge
USPS Tracking® - ...
Search
Create New Residential Customer

Do NOT use!

* Phone	First Name	Last Name	Account Name	Email
2029393480				

Phone Number Lookup

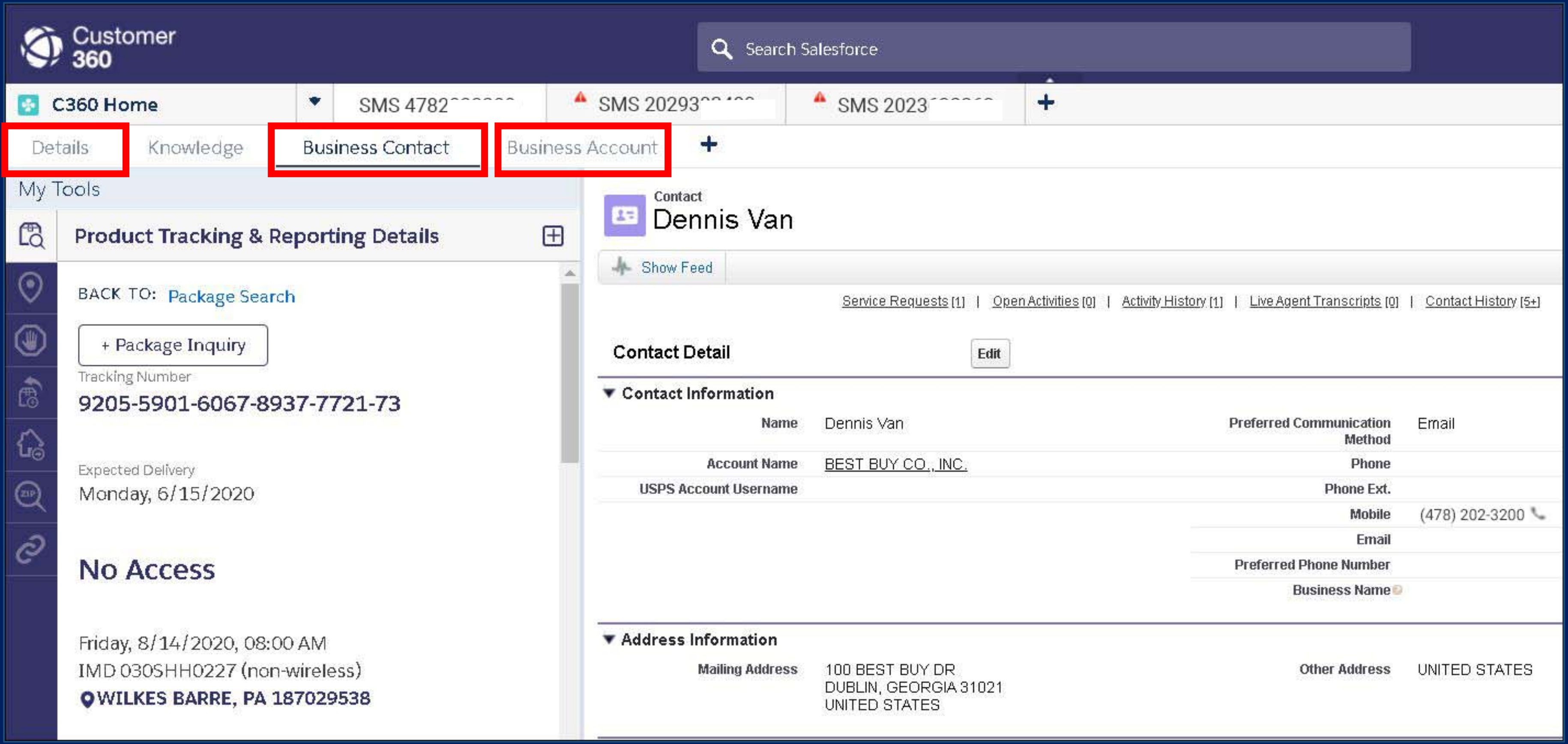
No results

Residential Customers

Person Accoun...	Home Phone	Mobile Phone	Street				Email	Action
Suzy-Q Bob		(202) 939-3480				07040		Open
Tom Arnold	(999) 666-3333	(444) 333-2234	7821 CADBURY AVE	POTOMAC	MD	20854-2969		Open
Nick Civetti	(999) 666-3333		1415 N TAFT ST APT 383	ARLINGTON	VA	22201-2638		Open

If one of these accounts matches the SMS Customer's account, then click the corresponding Open button to use it for the interaction.

C360 SMS Interaction: Existing Business Customers



Customer 360
Search Salesforce
C360 Home
SMS 4782[redacted]
SMS 20293[redacted]
SMS 2023[redacted]
+
Details
Knowledge
Business Contact
Business Account
+
My Tools
Product Tracking & Reporting Details
Show Feed
Service Requests [1] | Open Activities [0] | Activity History [1] | Live Agent Transcripts [0] | Contact History [5+]
Edit
+ Package Inquiry

BACK TO: Package Search

Tracking Number
9205-5901-6067-8937-7721-73

Expected Delivery
Monday, 6/15/2020

No Access

Friday, 8/14/2020, 08:00 AM
IMD 030SHH0227 (non-wireless)
WILKES BARRE, PA 187029538

Contact
Dennis Van

Contact Detail

Contact Information

Name: Dennis Van
Account Name: BEST BUY CO., INC.
USPS Account Username:
Preferred Communication Method: Email
Phone:
Phone Ext.:
Mobile: (478) 202-3200
Email:
Preferred Phone Number:
Business Name:

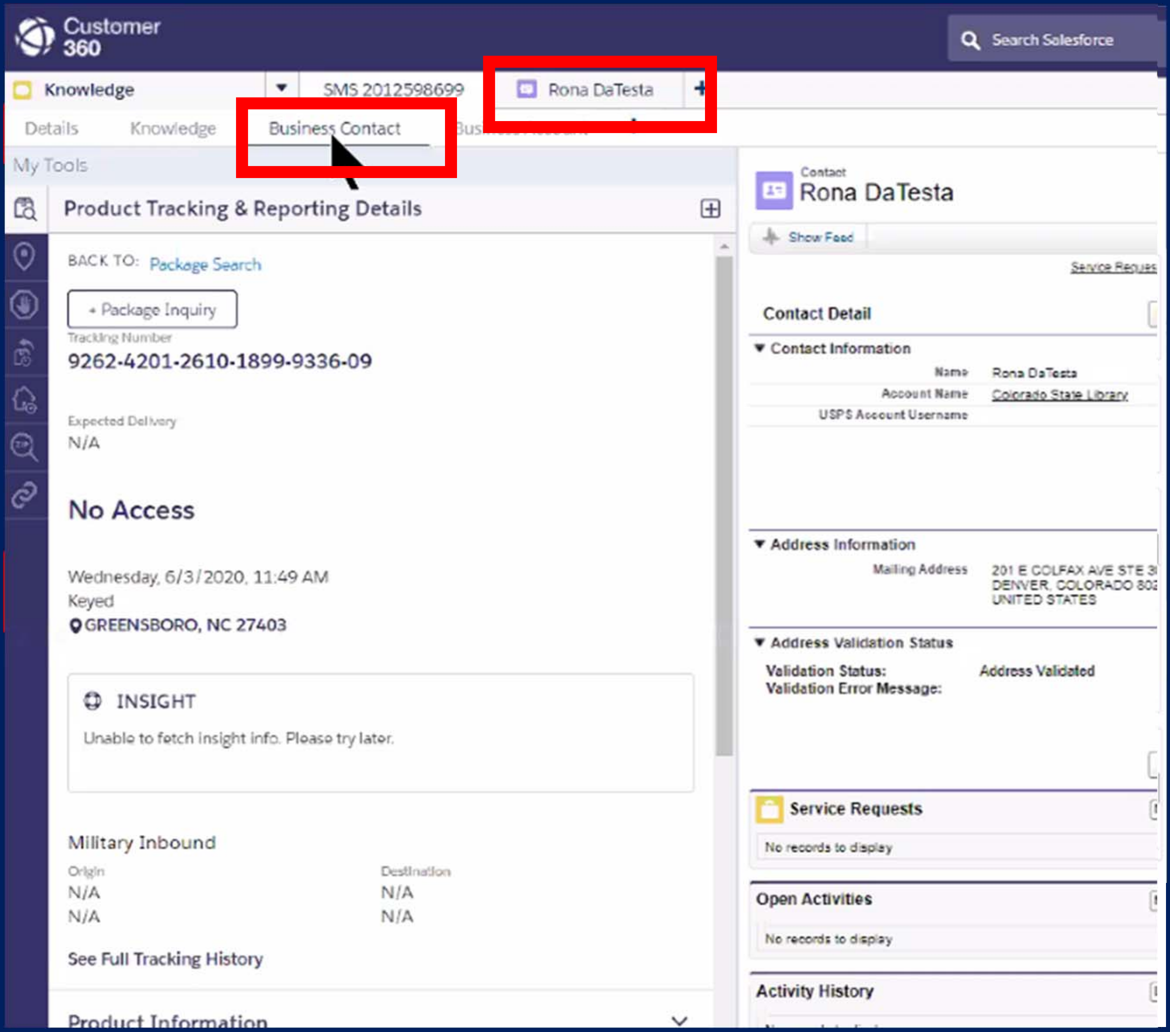
Address Information

Mailing Address: 100 BEST BUY DR
DUBLIN, GEORGIA 31021
UNITED STATES
Other Address: UNITED STATES

C360 SMS Interaction: Existing Business Customers – New Contact 1

Creating New Business Contact for SMS

1. Click **Business Account**.
2. Click **New Contact** button.
3. Enter the Contact's information.
4. Note the **PHONE NUMBER**.
5. Save the New Contact.
6. Click **Details** subtab.
7. Enter the **phone number**.
8. Click **Search**.
9. Scroll down to matching **Business Contact.**
10. Click **OPEN**.
11. The Business Contact will appear in the **SMS Sub-tab**.
12. Close the **Primary tab**.


Customer 360
Search Salesforce
Knowledge
SMS 2012598699
Rona DaTesta
Details
Knowledge
Business Contact
My Tools
Product Tracking & Reporting Details
BACK TO: Package Search
+ Package Inquiry
Show Feed
Service Reques
Contact Detail
See Full Tracking History
Product Information

Tracking Number
9262-4201-2610-1899-9336-09

Expected Delivery
N/A

No Access

Wednesday, 6/3/2020, 11:49 AM
Keyed
GREENSBORO, NC 27403

INSIGHT
Unable to fetch insight info. Please try later.

Military Inbound
Origin: N/A, N/A
Destination: N/A, N/A

Contact
Rona DaTesta

Contact Information
Name: Rona DaTesta
Account Name: Colorado State Library
USPS Account Username:

Address Information
Mailing Address: 201 E COLFAX AVE STE 3
DENVER, COLORADO 80
UNITED STATES

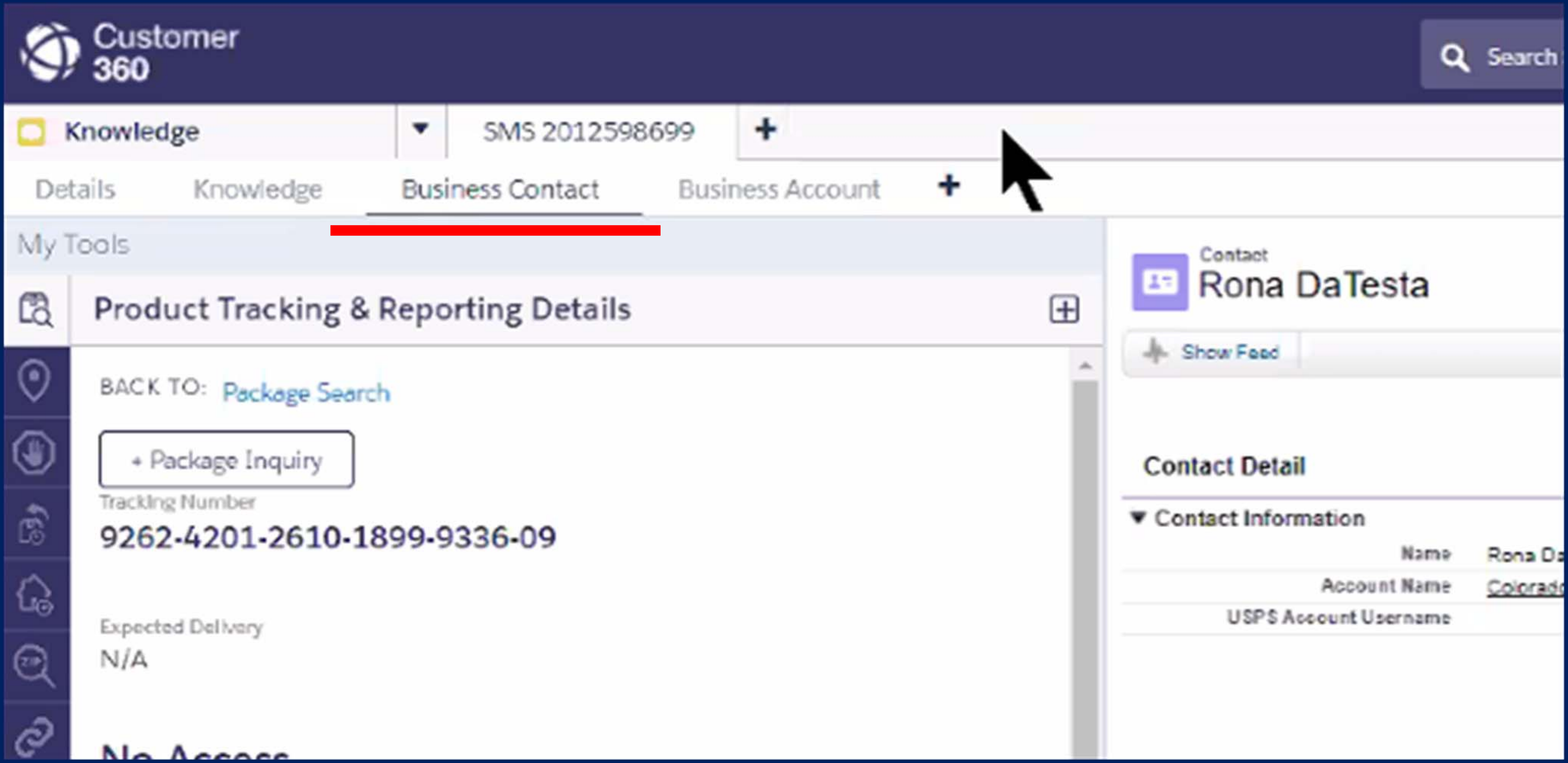
Address Validation Status
Validation Status: Address Validated
Validation Error Message:

Service Requests
No records to display

Open Activities
No records to display

Activity History

C360 SMS Interaction:
Existing Business Customers – New Contact 2



Customer 360
Search
Knowledge
SMS 2012598699
Details
Knowledge
Business Contact
Business Account
My Tools
Show Feed
+ Package Inquiry

Product Tracking & Reporting Details

BACK TO: Package Search

Tracking Number
9262-4201-2610-1899-9336-09

Expected Delivery
N/A

Contact
Rona DaTesta

Contact Detail

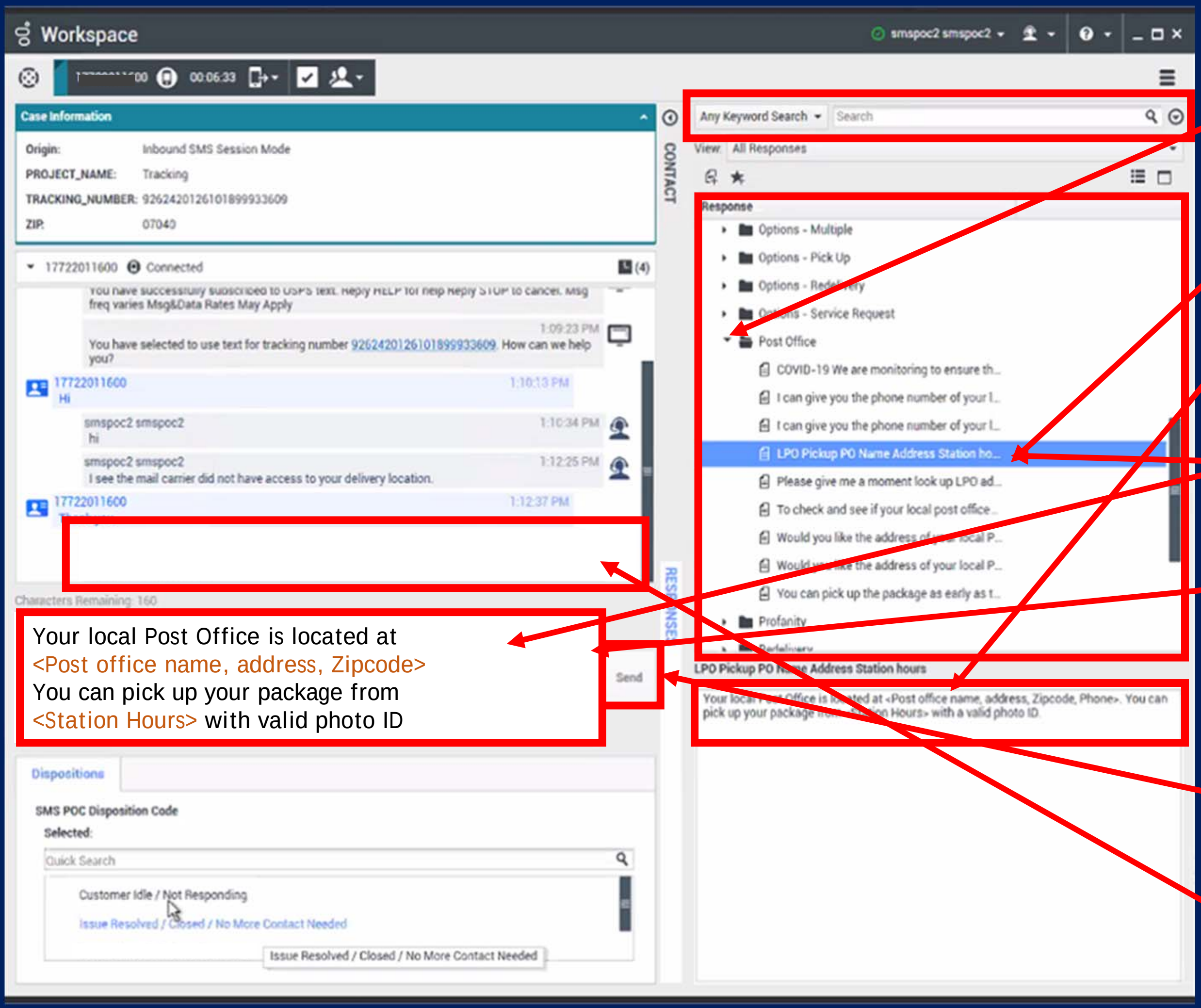
▼ Contact Information

Name	Rona Da
Account Name	Colorad
USPS Account Username	

What's Next?

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

Selecting and Editing Standard Responses


Workspace
1[redacted]00
00:06:33
smspoc2 smspoc2
CONTACT
RESPONSES
Send

Case Information

Origin: Inbound SMS Session Mode
PROJECT_NAME: Tracking
TRACKING_NUMBER: 9262420126101899933609
ZIP: 07040

17722011600 Connected (4)

You have successfully subscribed to USPS text. Reply HELP for help Reply STOP to cancel. Msg freq varies Msg&Data Rates May Apply

1:09:23 PM
You have selected to use text for tracking number 9262420126101899933609. How can we help you?

17722011600 1:10:13 PM
Hi

smspoc2 smspoc2 1:10:34 PM
hi

smspoc2 smspoc2 1:12:25 PM
I see the mail carrier did not have access to your delivery location.

17722011600 1:12:37 PM

Characters Remaining: 160

Your local Post Office is located at
<Post office name, address, Zipcode>
You can pick up your package from
<Station Hours> with valid photo ID

Any Keyword Search
Search
View: All Responses
Response
Options - Multiple
Options - Pick Up
Options - Redelivery
Options - Service Request
Post Office
COVID-19 We are monitoring to ensure th...
I can give you the phone number of your l...
I can give you the phone number of your l...
LPO Pickup PO Name Address Station ho...
Please give me a moment look up LPO ad...
To check and see if your local post office...
Would you like the address of your local P...
Would you like the address of your local P...
You can pick up the package as early as t...
Profanity
Redelivery

LPO Pickup PO Name Address Station hours

Your local Post Office is located at <Post office name, address, Zipcode, Phone>. You can pick up your package from <Station Hours> with a valid photo ID.

Dispositions
SMS POC Disposition Code
Selected:
Quick Search
Customer Idle / Not Responding
Issue Resolved / Closed / No More Contact Needed
Issue Resolved / Closed / No More Contact Needed

1. Click the drop down arrow to the left of folder.
2. Click to highlight response.
3. Preview response in the box below.
4. Double-click highlighted response to copy into editing box.
5. Edit according to QSDD Standards if necessary (location, hours, misspelled words, duplicate entry).
6. After proofreading, click Send to right of text box

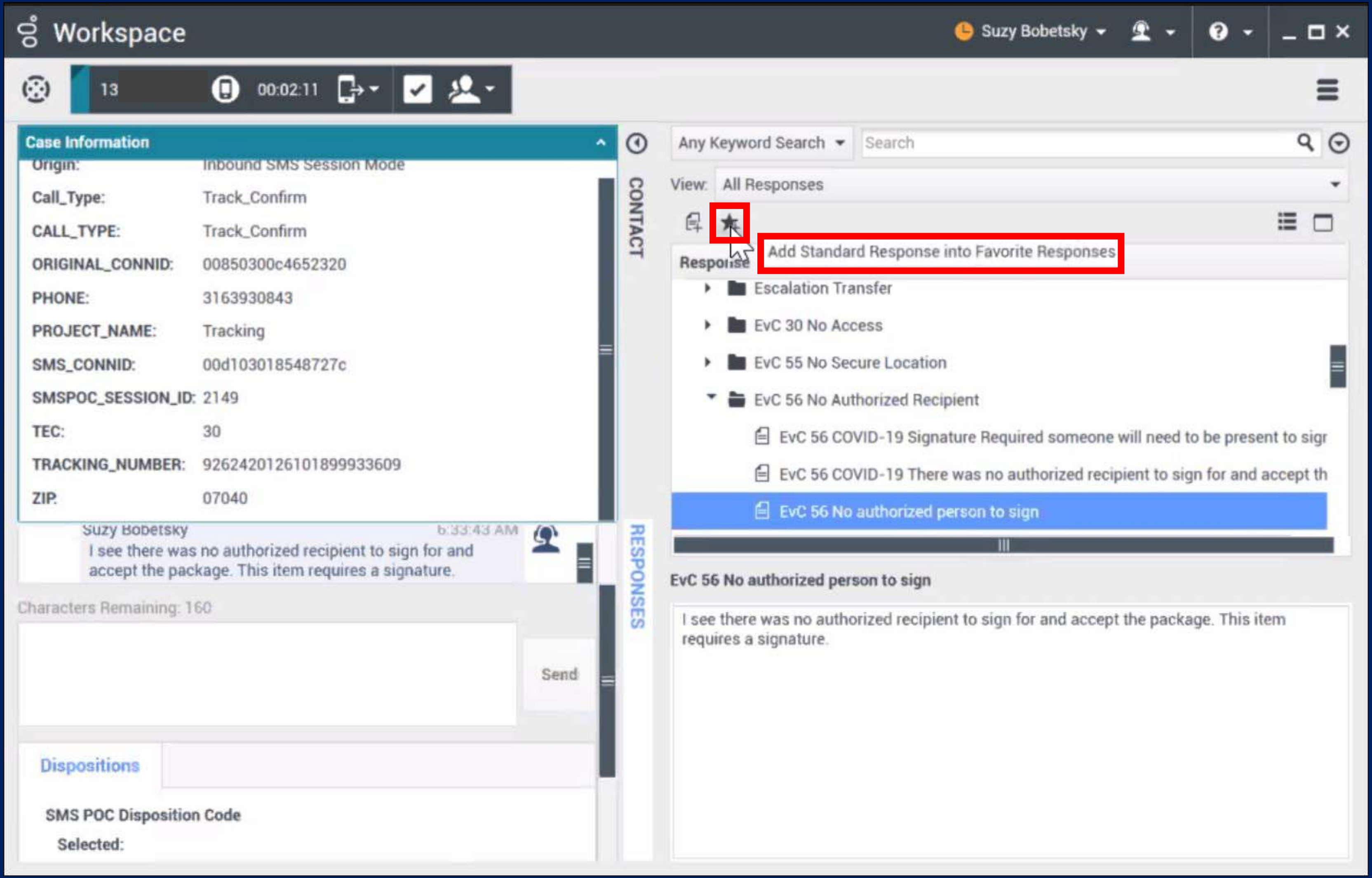
When sent, the message will appear in the Active SMS Interaction panel above the editing box.

Video: Customer Name Prepopulates

Video

SMS - Customer Name Prepopulates

Adding Standard Responses to Favorites



Workspace
Suzy Bobetsky
13
00:02:11
CONTACT
RESPONSES
Any Keyword Search
Search
View: All Responses
Add Standard Response into Favorite Responses
Response
Send
Dispositions

Case Information

Origin:	Inbound SMS Session Mode
Call_Type:	Track_Confirm
CALL_TYPE:	Track_Confirm
ORIGINAL_CONNID:	00850300c4652320
PHONE:	3163930843
PROJECT_NAME:	Tracking
SMS_CONNID:	00d103018548727c
SMSPOC_SESSION_ID:	2149
TEC:	30
TRACKING_NUMBER:	9262420126101899933609
ZIP:	07040

Suzy Bobetsky 6:33:43 AM
I see there was no authorized recipient to sign for and accept the package. This item requires a signature.

Characters Remaining: 160

SMS POC Disposition Code
Selected:

- Escalation Transfer
- EvC 30 No Access
- EvC 55 No Secure Location
- EvC 56 No Authorized Recipient
  - EvC 56 COVID-19 Signature Required someone will need to be present to sigr
  - EvC 56 COVID-19 There was no authorized recipient to sign for and accept th
  - EvC 56 No authorized person to sign

EvC 56 No authorized person to sign

I see there was no authorized recipient to sign for and accept the package. This item requires a signature.

UNITED STATES POSTAL SERVICE

SMS Etiquette (1 of 2)

SMS requires a more formal style than personal texting:

Do:

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

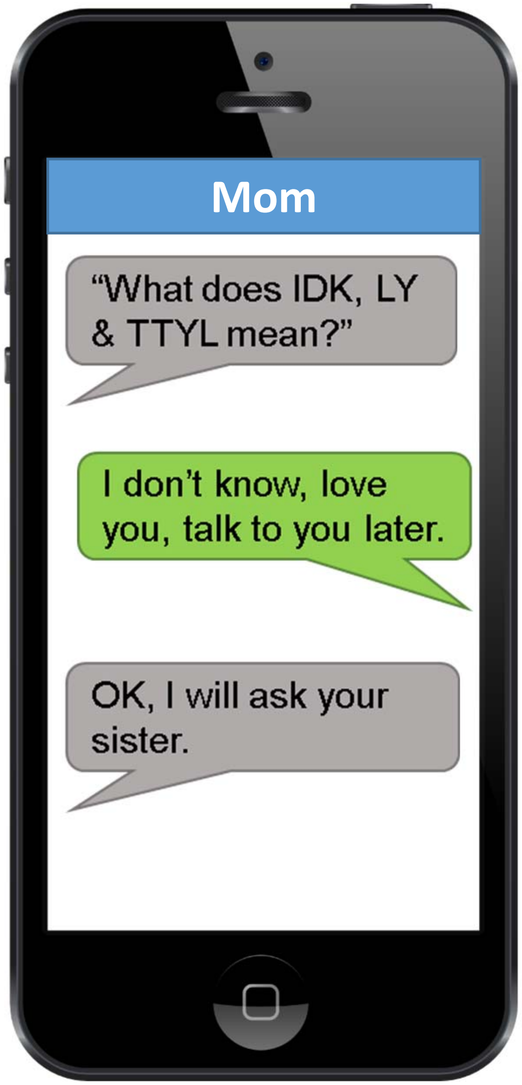
Don’t:

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

OMG!

No, I can’t do that.

SMS Etiquette (2 of 2)



"What does IDK, LY & TTYL mean?"

I don't know, love you, talk to you later.

OK, I will ask your sister.

Need help understanding a customer's abbreviation?

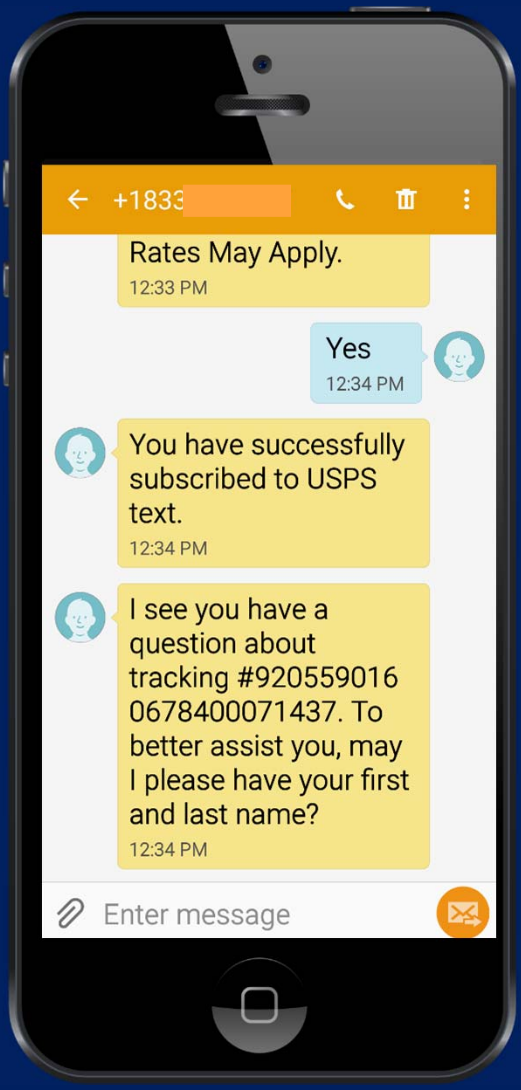
See knowledge article:

Quality: SMS Handling

If the customer uses something that you don't understand, and it's not in the article, use the SMS standard response:

> *I'm sorry, I'm not familiar with that abbreviation/term/phrase. Can you please clarify?*

System-Generated Messages


← +1833[redacted]

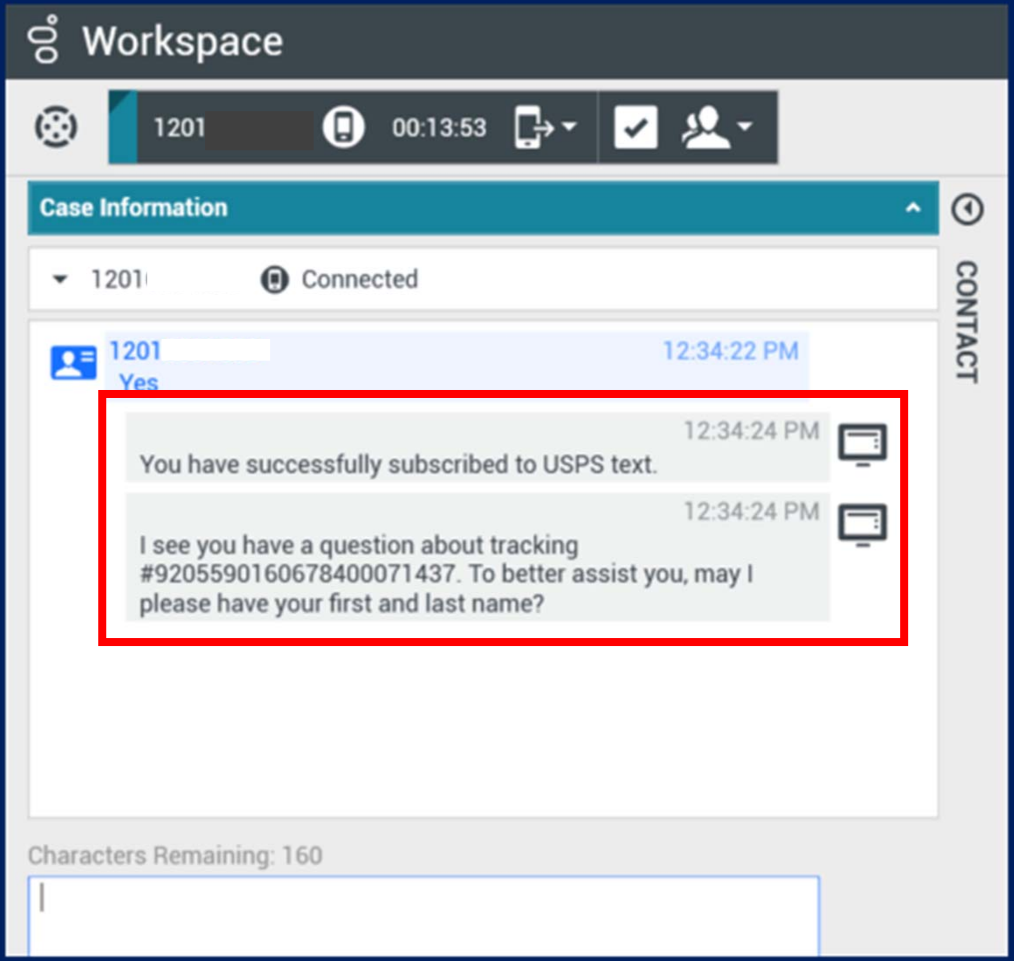
Rates May Apply.
12:33 PM

Yes
12:34 PM

You have successfully subscribed to USPS text.
12:34 PM

I see you have a question about tracking #9205590160678400071437. To better assist you, may I please have your first and last name?
12:34 PM

Enter message


Workspace
1201[redacted] 00:13:53
Case Information
1201[redacted] Connected
CONTACT

1201[redacted] 12:34:22 PM
Yes

12:34:24 PM
You have successfully subscribed to USPS text.

12:34:24 PM
I see you have a question about tracking #9205590160678400071437. To better assist you, may I please have your first and last name?

Characters Remaining: 160

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- Demo/Practice

SMS Disposition Codes

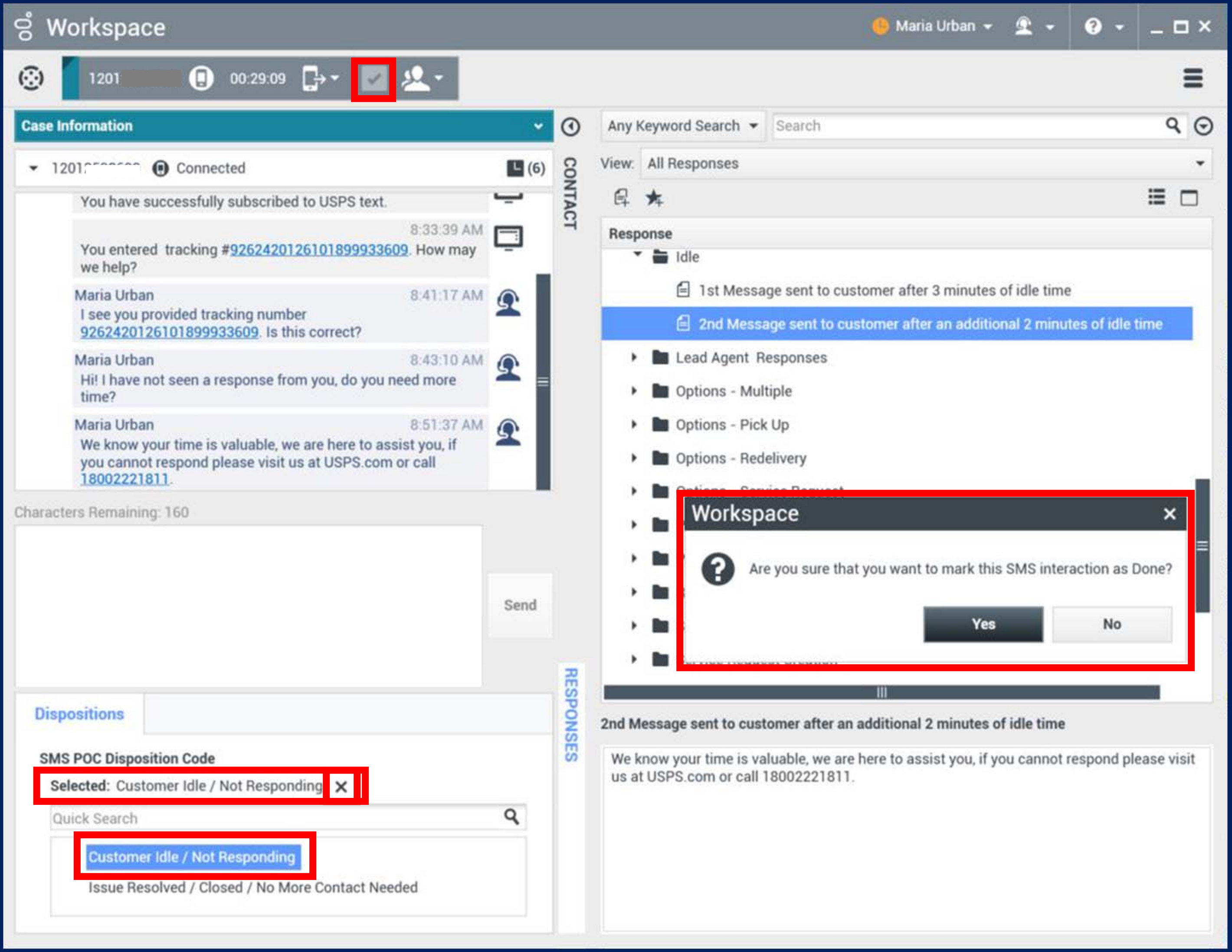
Customer Idle / Not Responding

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

Issue Resolved / Closed / No More Contact Needed

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

Selecting a Disposition Code



1201[redacted]

You have successfully subscribed to USPS text.

8:33:39 AM
You entered tracking #9262420126101899933609. How may we help?

Maria Urban 8:41:17 AM
I see you provided tracking number 9262420126101899933609. Is this correct?

Maria Urban 8:43:10 AM
Hi! I have not seen a response from you, do you need more time?

Maria Urban 8:51:37 AM
We know your time is valuable, we are here to assist you, if you cannot respond please visit us at USPS.com or call 18002221811.

Characters Remaining: 160

Dispositions

SMS POC Disposition Code

Selected: Customer Idle / Not Responding ✕

Quick Search

- Customer Idle / Not Responding
- Issue Resolved / Closed / No More Contact Needed

View: All Responses

Response

- Idle
  - 1st Message sent to customer after 3 minutes of idle time
  - 2nd Message sent to customer after an additional 2 minutes of idle time
- Lead Agent Responses
- Options - Multiple
- Options - Pick Up
- Options - Redelivery

Workspace

Are you sure that you want to mark this SMS interaction as Done?

2nd Message sent to customer after an additional 2 minutes of idle time

We know your time is valuable, we are here to assist you, if you cannot respond please visit us at USPS.com or call 18002221811.

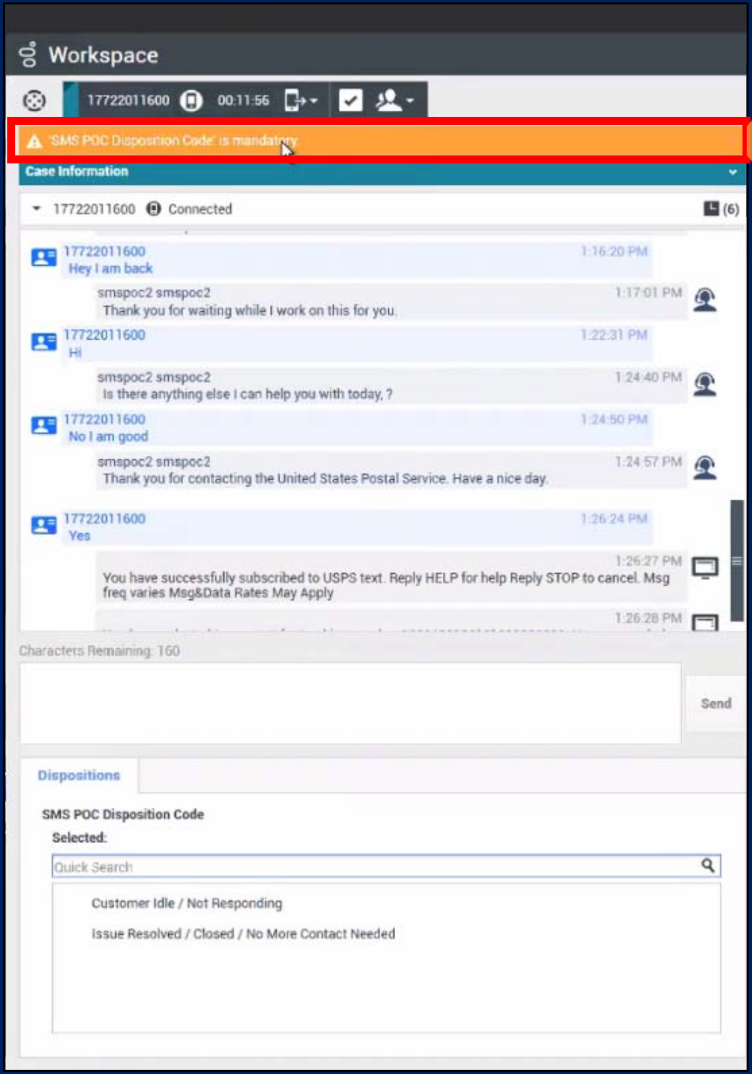
Inactive Customers

Customer calls in and receives initial SMS, but does not opt-in right away

1. Automated Opt-in message sent
    - No response from customer
    - Agent will send 3 minute message
2. An additional 2 minutes has passed
    - Agent will send 2 minute message
    - Select Disposition
    - Click Done

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

Error Message



⚠ 'SMS POC Disposition Code' is mandatory

17722011600 Connected

17722011600 1:16:20 PM
Hey I am back

smspoc2 smspoc2 1:17:01 PM
Thank you for waiting while I work on this for you.

17722011600 1:22:31 PM
Hi

smspoc2 smspoc2 1:24:40 PM
Is there anything else I can help you with today, ?

17722011600 1:24:50 PM
No I am good

smspoc2 smspoc2 1:24:57 PM
Thank you for contacting the United States Postal Service. Have a nice day.

17722011600 1:26:24 PM
Yes

1:26:27 PM
You have successfully subscribed to USPS text. Reply HELP for help Reply STOP to cancel. Msg freq varies Msg&Data Rates May Apply

1:26:28 PM

Characters Remaining: 160

SMS POC Disposition Code

Selected:

Quick Search

- Customer Idle / Not Responding
- Issue Resolved / Closed / No More Contact Needed

⚠ ‘SMS Disposition Code’ is mandatory

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

Knowledge Check: Add a Stamp!

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

a. Issue Resolved / Closed / No More Contact Needed

[✓ b. Customer Idle / Not Responding]

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

a. True

[✓ b. False]

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

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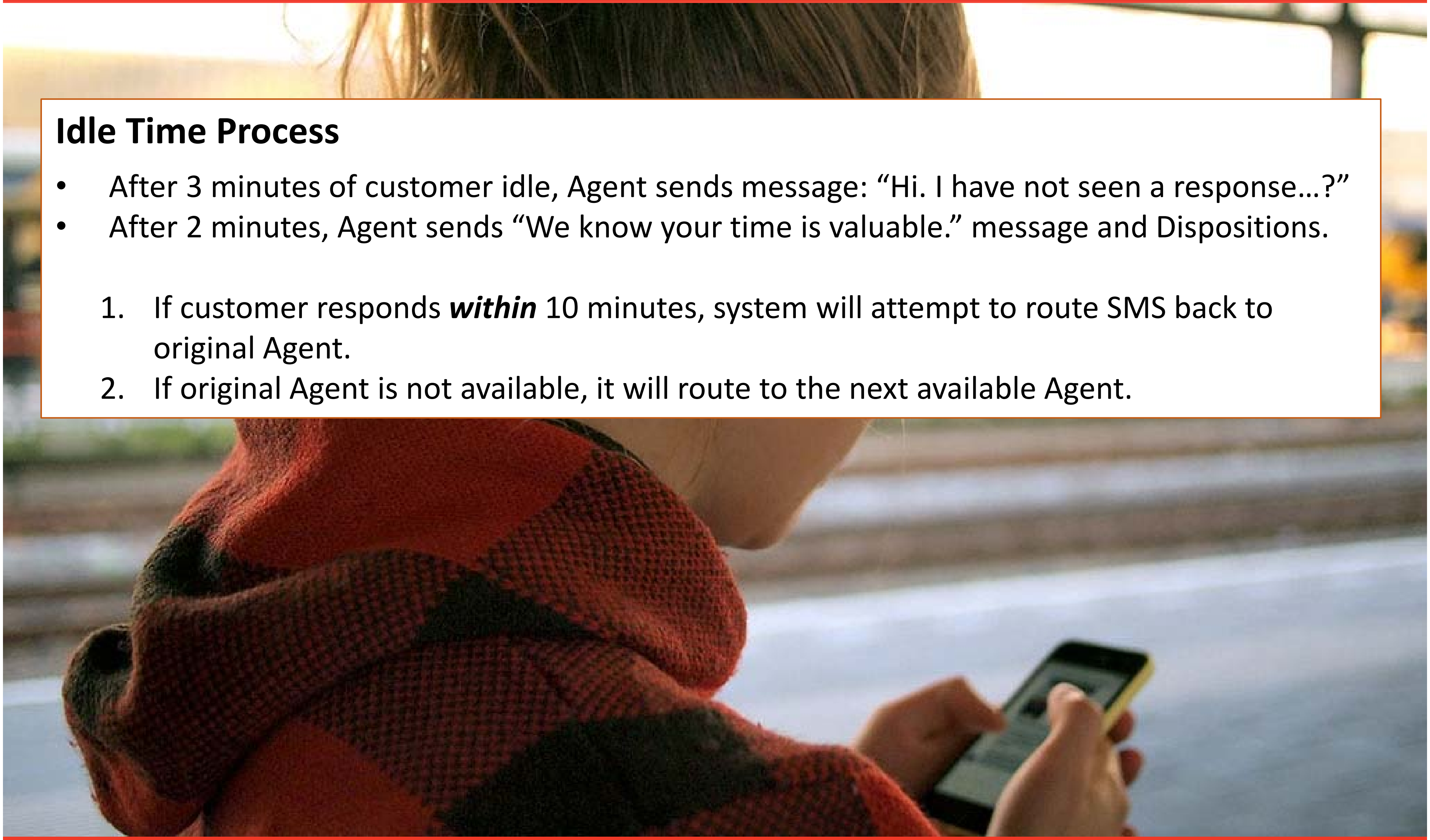
Reactivated Session

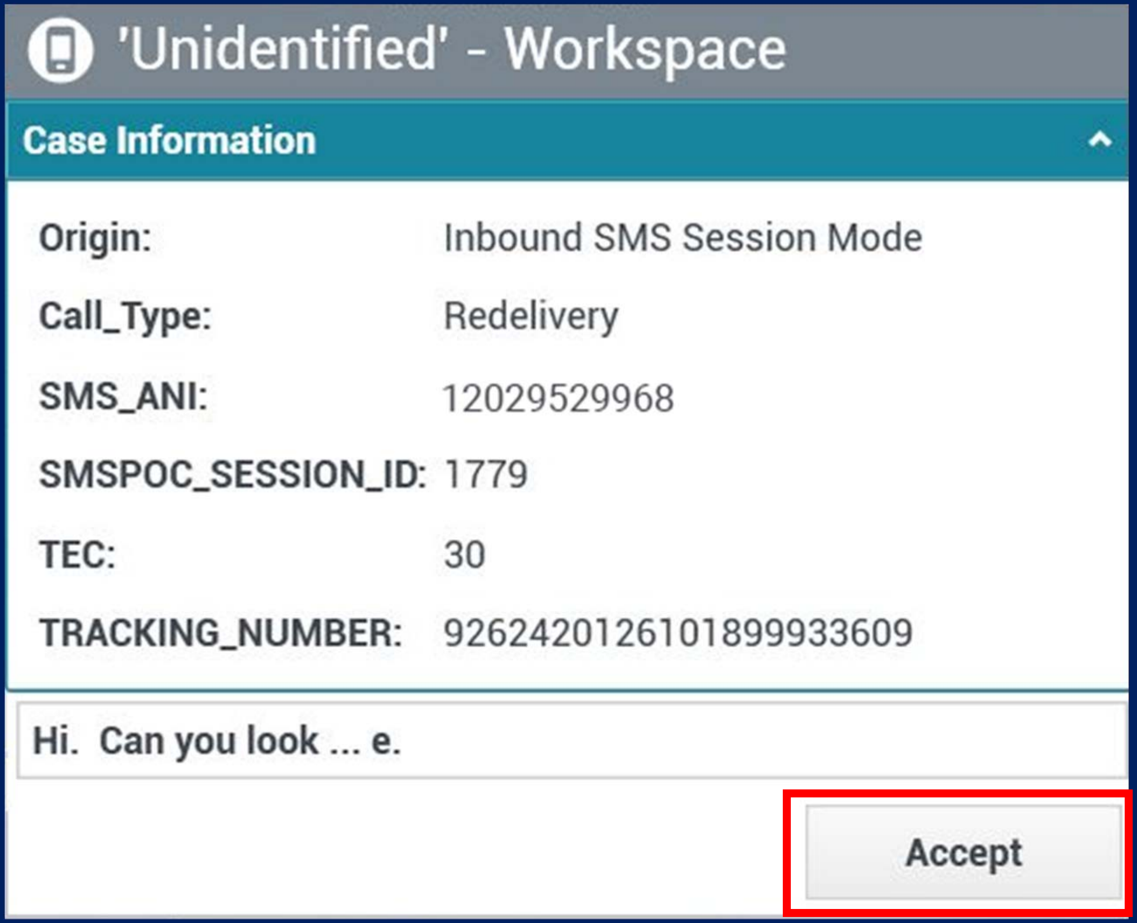


Idle Time Process

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

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

Reactivated Session to the Same Agent


'Unidentified' - Workspace
Case Information
Accept

Origin: Inbound SMS Session Mode

Call_Type: Redelivery

SMS_ANI: 12029529968

SMSPOC_SESSION_ID: 1779

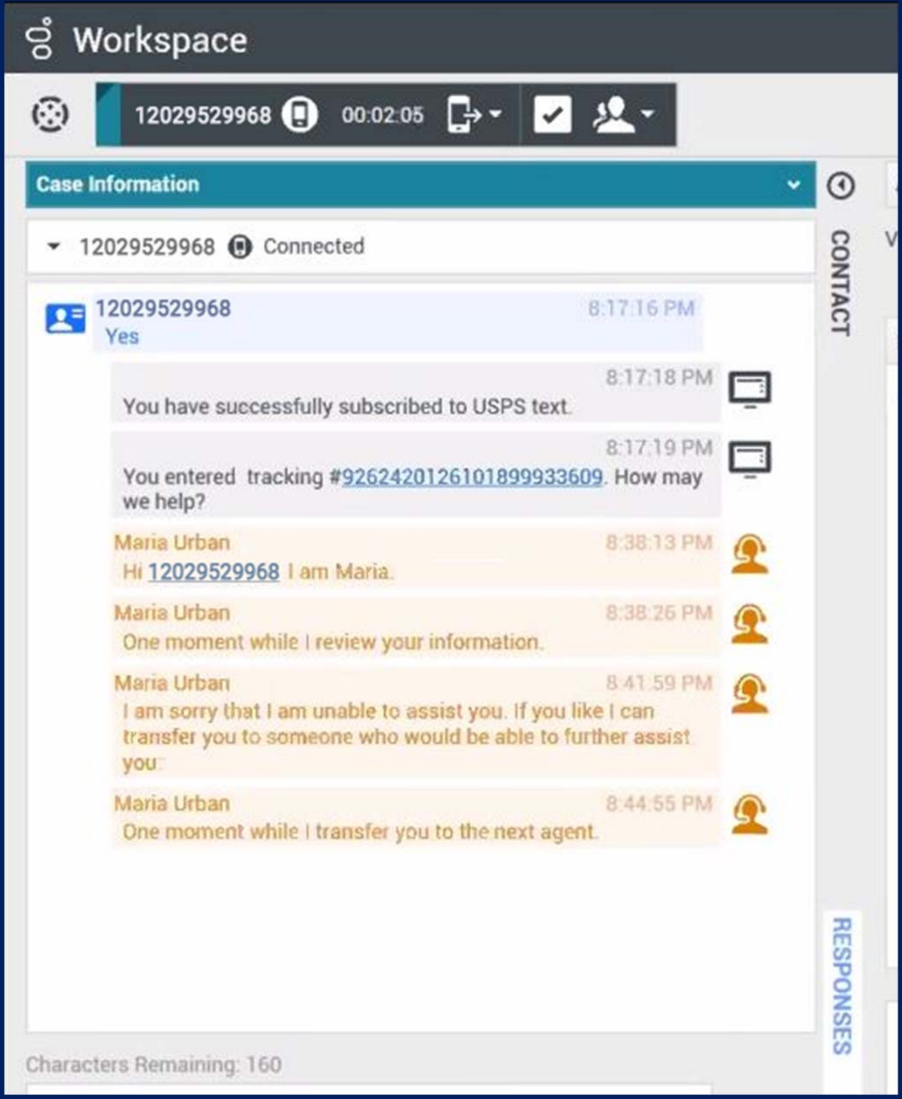
TEC: 30

TRACKING_NUMBER: 9262420126101899933609

Hi. Can you look ... e.

- If the customer sends a text message within the reactivation period, the session will be reactivated.
- WDE pop-up window will appear on Agent’s desktop.
- Agent must click Accept to continue session.

Reactivated Session to a New Agent



12029529968 Connected

12029529968 8:17:16 PM
Yes

8:17:18 PM
You have successfully subscribed to USPS text.

8:17:19 PM
You entered tracking #9262420126101899933609. How may we help?

Maria Urban 8:38:13 PM
Hi 12029529968 I am Maria.

Maria Urban 8:38:26 PM
One moment while I review your information.

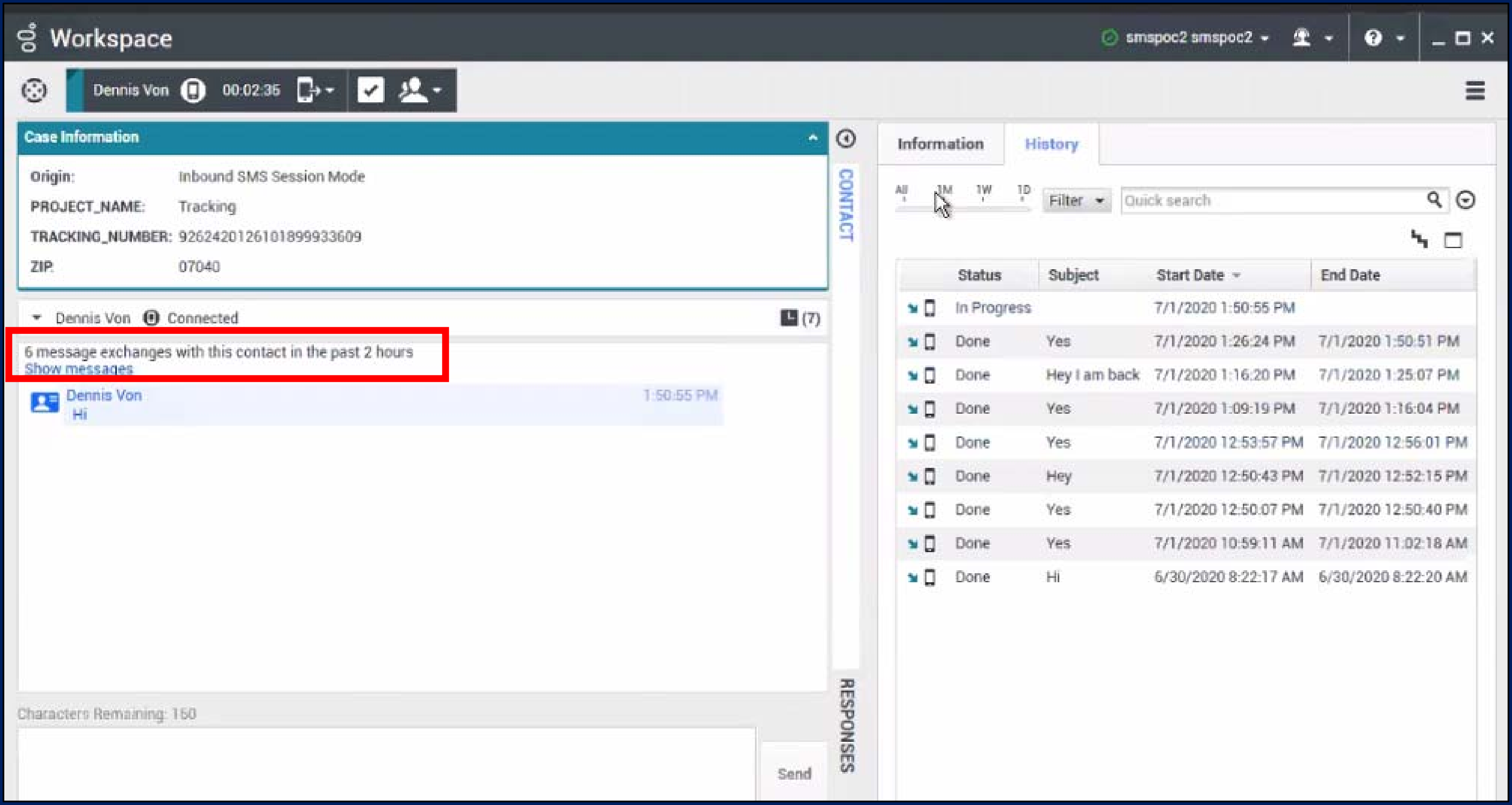
Maria Urban 8:41:59 PM
I am sorry that I am unable to assist you. If you like I can transfer you to someone who would be able to further assist you.

Maria Urban 8:44:55 PM
One moment while I transfer you to the next agent.

Characters Remaining: 160

- If the original Agent isn’t available, WDE will route the interaction to the next available Agent.
- The original Agent’s text to the customer will appear orange in the Active SMS Responses pane.

Number of Message Exchanges


Workspace
smspoc2 smspoc2
Dennis Von
00:02:36
CONTACT
RESPONSES
Information
History
All
1M
1W
1D
Filter
Quick search
Send

Case Information

Origin: Inbound SMS Session Mode
PROJECT_NAME: Tracking
TRACKING_NUMBER: 9262420126101899933609
ZIP: 07040

Dennis Von Connected (7)

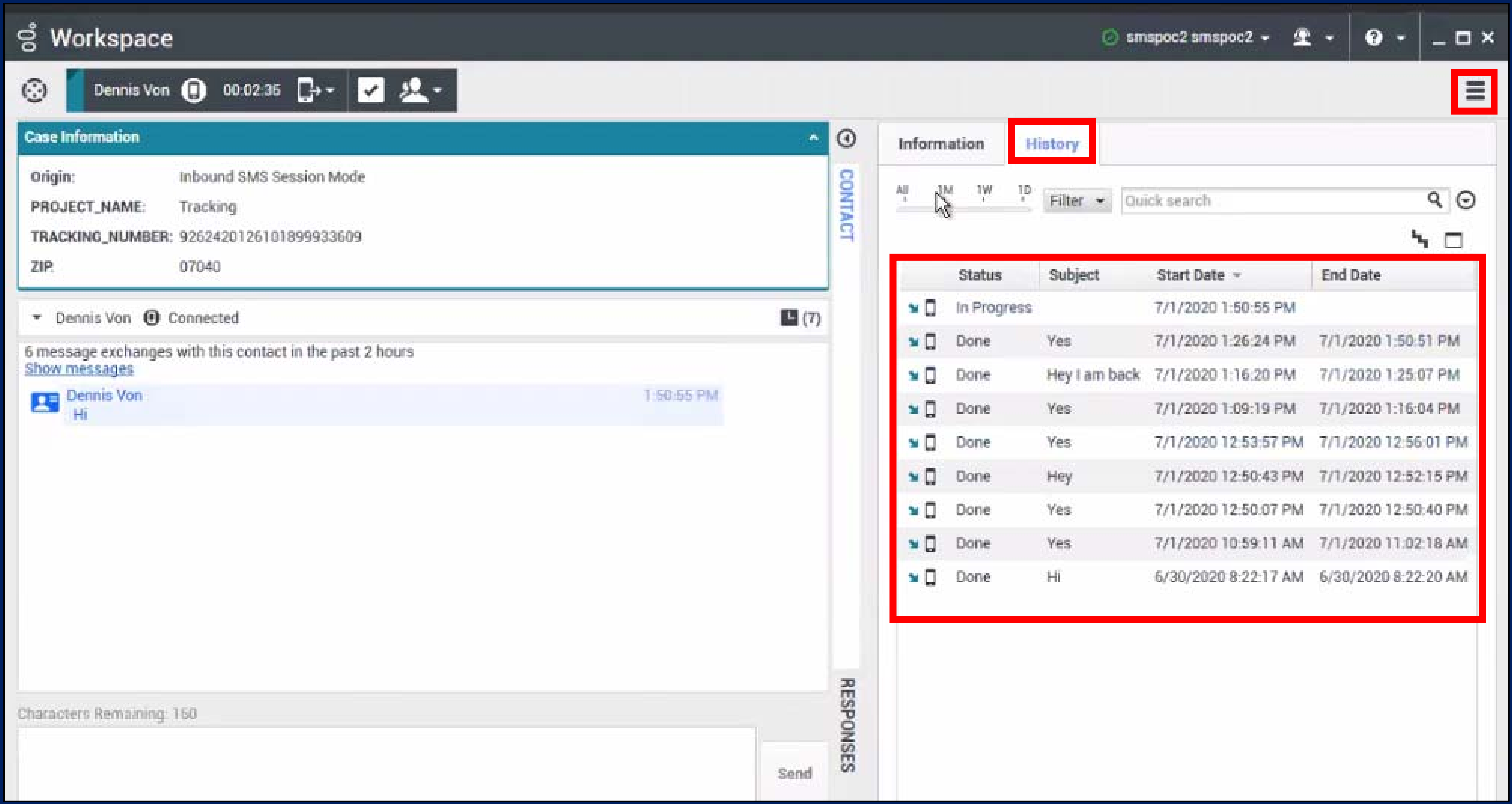
6 message exchanges with this contact in the past 2 hours
Show messages

Dennis Von 1:50:55 PM
Hi

Characters Remaining: 160

Status	Subject	Start Date	End Date
In Progress		7/1/2020 1:50:55 PM	
Done	Yes	7/1/2020 1:26:24 PM	7/1/2020 1:50:51 PM
Done	Hey I am back	7/1/2020 1:16:20 PM	7/1/2020 1:25:07 PM
Done	Yes	7/1/2020 1:09:19 PM	7/1/2020 1:16:04 PM
Done	Yes	7/1/2020 12:53:57 PM	7/1/2020 12:56:01 PM
Done	Hey	7/1/2020 12:50:43 PM	7/1/2020 12:52:15 PM
Done	Yes	7/1/2020 12:50:07 PM	7/1/2020 12:50:40 PM
Done	Yes	7/1/2020 10:59:11 AM	7/1/2020 11:02:18 AM
Done	Hi	6/30/2020 8:22:17 AM	6/30/2020 8:22:20 AM

Chat History


Workspace
smspoc2 smspoc2
Dennis Von
00:02:36
Information
History
All
1M
1W
1D
Filter
Quick search
CONTACT
RESPONSES
Send

Case Information

Origin: Inbound SMS Session Mode
PROJECT_NAME: Tracking
TRACKING_NUMBER: 9262420126101899933609
ZIP: 07040

Dennis Von Connected (7)

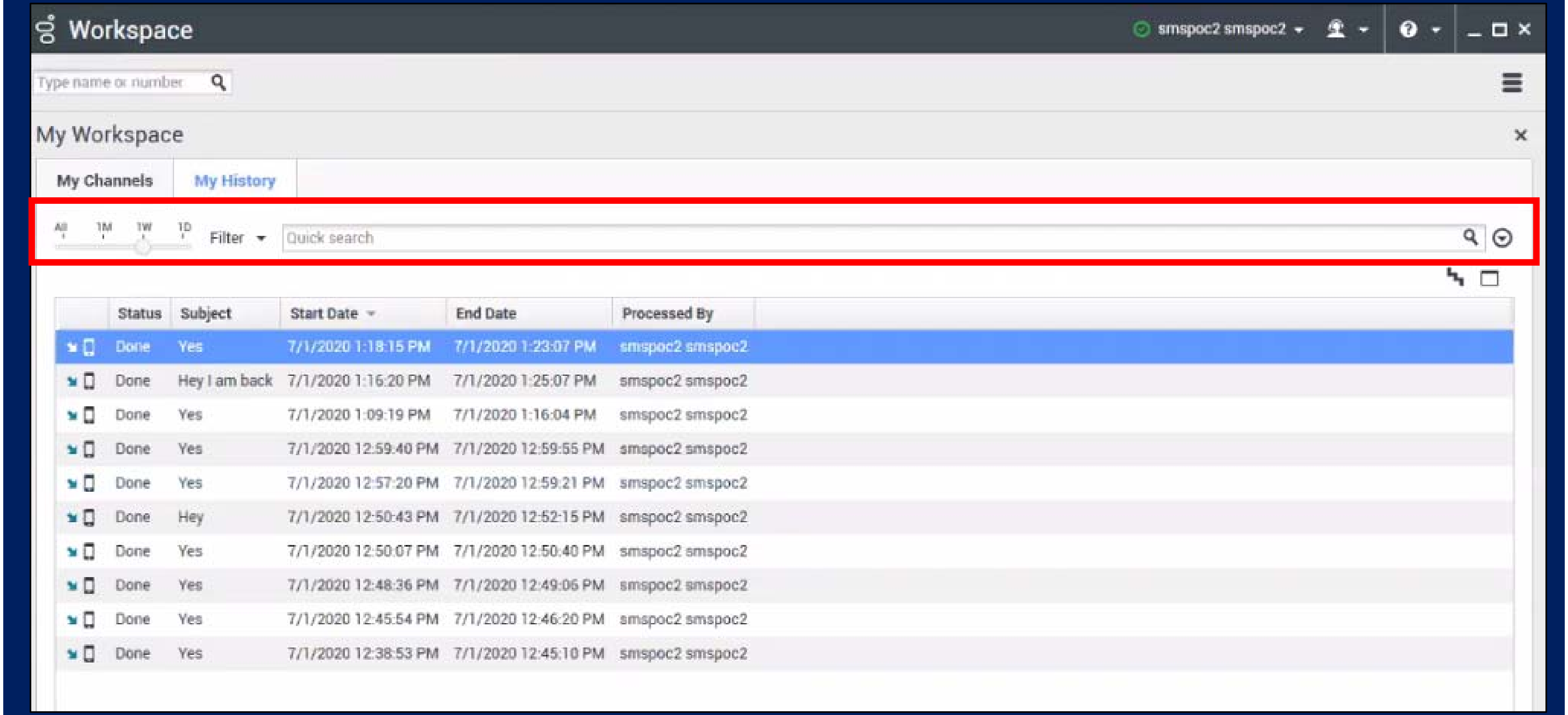
6 message exchanges with this contact in the past 2 hours
Show messages

Dennis Von 1:50:55 PM
Hi

Characters Remaining: 160

Status	Subject	Start Date	End Date
In Progress		7/1/2020 1:50:55 PM	
Done	Yes	7/1/2020 1:26:24 PM	7/1/2020 1:50:51 PM
Done	Hey I am back	7/1/2020 1:16:20 PM	7/1/2020 1:25:07 PM
Done	Yes	7/1/2020 1:09:19 PM	7/1/2020 1:16:04 PM
Done	Yes	7/1/2020 12:53:57 PM	7/1/2020 12:56:01 PM
Done	Hey	7/1/2020 12:50:43 PM	7/1/2020 12:52:15 PM
Done	Yes	7/1/2020 12:50:07 PM	7/1/2020 12:50:40 PM
Done	Yes	7/1/2020 10:59:11 AM	7/1/2020 11:02:18 AM
Done	Hi	6/30/2020 8:22:17 AM	6/30/2020 8:22:20 AM

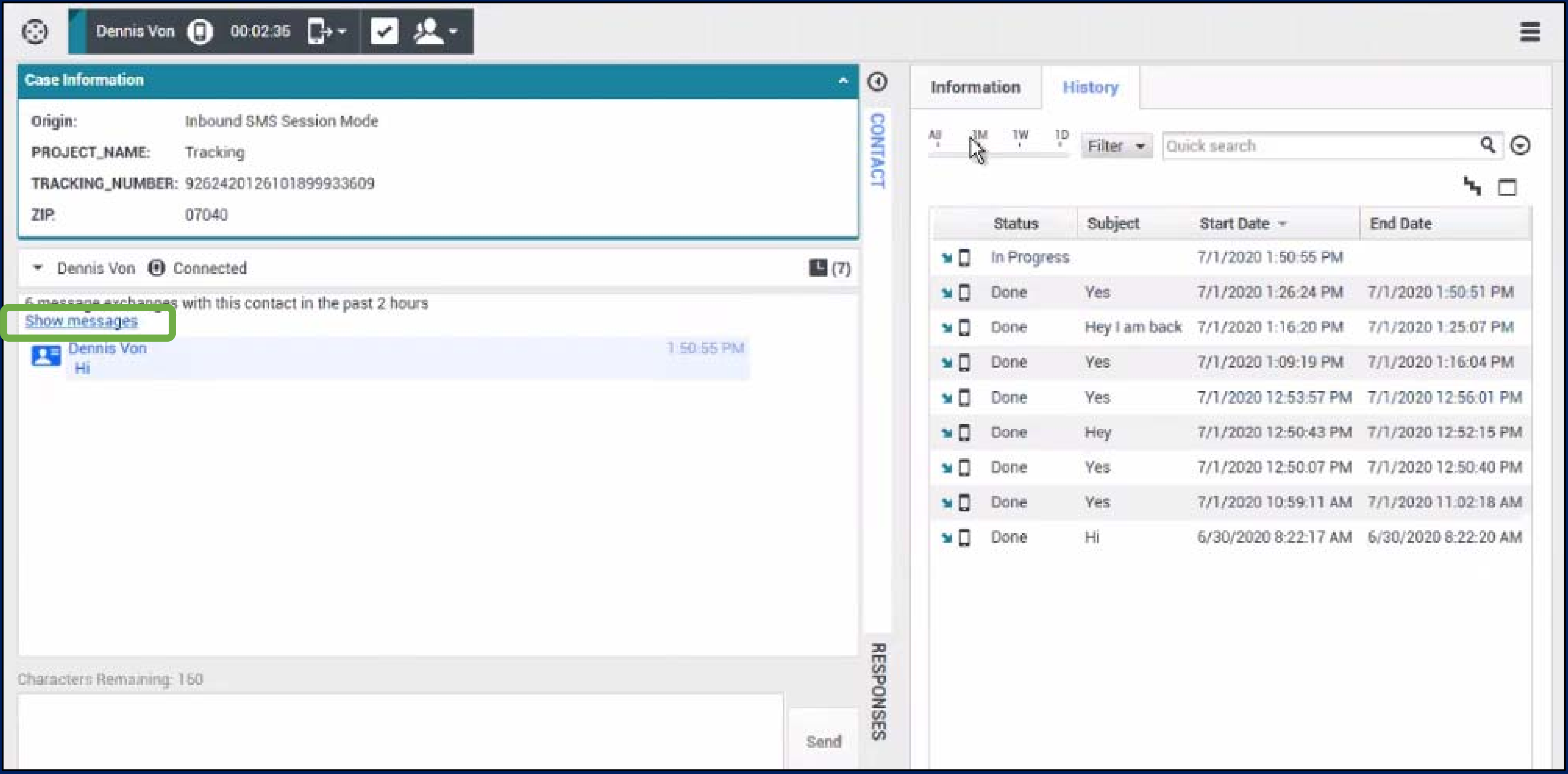
Using Filters


Workspace
smspoc2 smspoc2
Type name or number
My Workspace
My Channels
My History
All
1M
1W
1D
Filter
Quick search

Status	Subject	Start Date	End Date	Processed By
Done	Yes	7/1/2020 1:18:15 PM	7/1/2020 1:23:07 PM	smspoc2 smspoc2
Done	Hey I am back	7/1/2020 1:16:20 PM	7/1/2020 1:25:07 PM	smspoc2 smspoc2
Done	Yes	7/1/2020 1:09:19 PM	7/1/2020 1:16:04 PM	smspoc2 smspoc2
Done	Yes	7/1/2020 12:59:40 PM	7/1/2020 12:59:55 PM	smspoc2 smspoc2
Done	Yes	7/1/2020 12:57:20 PM	7/1/2020 12:59:21 PM	smspoc2 smspoc2
Done	Hey	7/1/2020 12:50:43 PM	7/1/2020 12:52:15 PM	smspoc2 smspoc2
Done	Yes	7/1/2020 12:50:07 PM	7/1/2020 12:50:40 PM	smspoc2 smspoc2
Done	Yes	7/1/2020 12:48:36 PM	7/1/2020 12:49:06 PM	smspoc2 smspoc2
Done	Yes	7/1/2020 12:45:54 PM	7/1/2020 12:46:20 PM	smspoc2 smspoc2
Done	Yes	7/1/2020 12:38:53 PM	7/1/2020 12:45:10 PM	smspoc2 smspoc2

Knowledge Check

Where would you click to see the customer interactions for the last 2 hours?


Dennis Von
00:02:36
Case Information
CONTACT
RESPONSES
Information
History
All
1M
1W
1D
Filter
Quick search
Characters Remaining: 150
Send

Case Information

Origin: Inbound SMS Session Mode
PROJECT_NAME: Tracking
TRACKING_NUMBER: 9262420126101899933609
ZIP: 07040

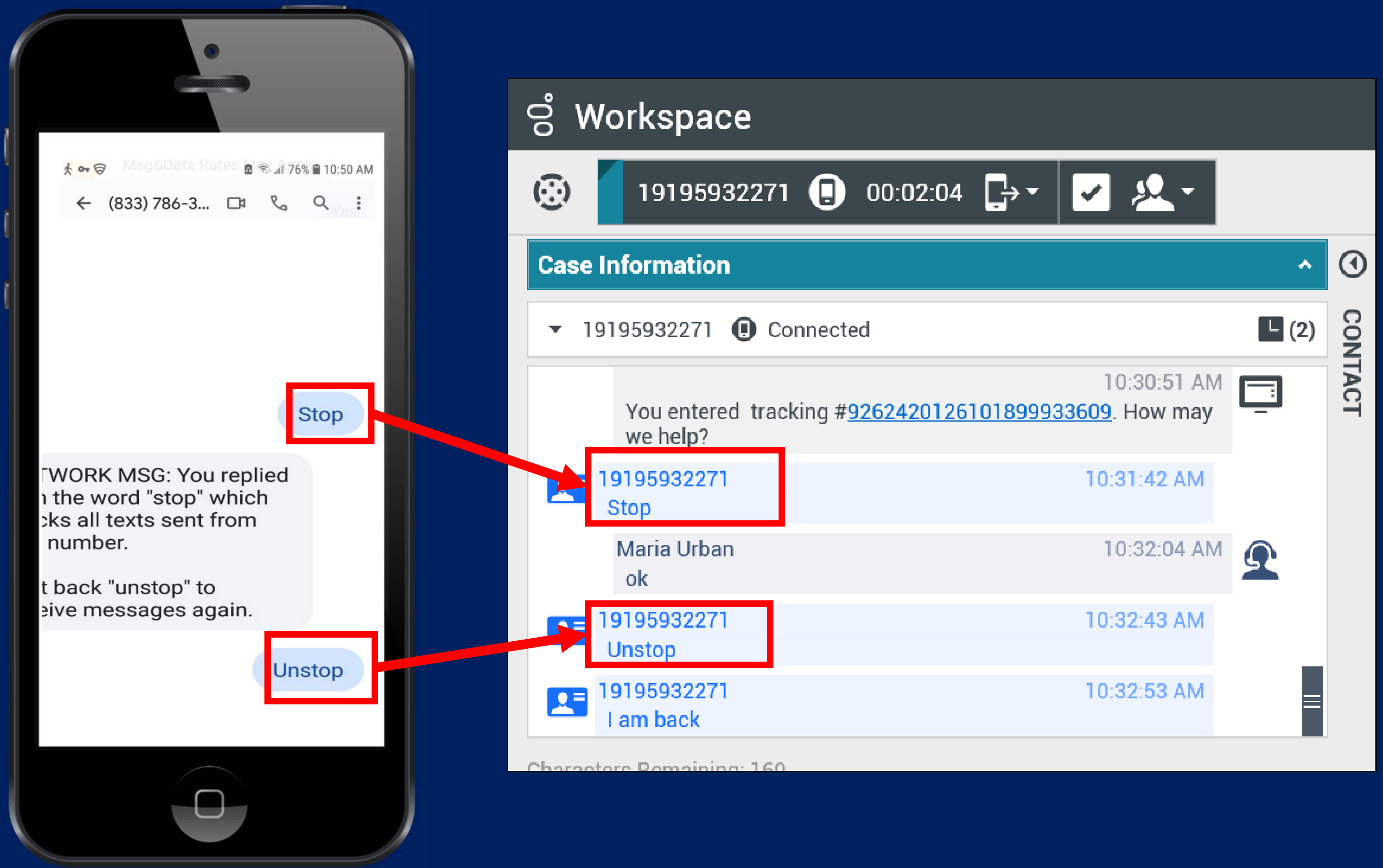
Dennis Von Connected (7)

6 message exchanges with this contact in the past 2 hours
Show messages

Dennis Von 1:50:55 PM
Hi

Status	Subject	Start Date	End Date
In Progress		7/1/2020 1:50:55 PM	
Done	Yes	7/1/2020 1:26:24 PM	7/1/2020 1:50:51 PM
Done	Hey I am back	7/1/2020 1:16:20 PM	7/1/2020 1:25:07 PM
Done	Yes	7/1/2020 1:09:19 PM	7/1/2020 1:16:04 PM
Done	Yes	7/1/2020 12:53:57 PM	7/1/2020 12:56:01 PM
Done	Hey	7/1/2020 12:50:43 PM	7/1/2020 12:52:15 PM
Done	Yes	7/1/2020 12:50:07 PM	7/1/2020 12:50:40 PM
Done	Yes	7/1/2020 10:59:11 AM	7/1/2020 11:02:18 AM
Done	Hi	6/30/2020 8:22:17 AM	6/30/2020 8:22:20 AM

Customer Stop and Unstop Messages



(833) 786-3...
10:50 AM
76%
Stop
Unstop
Workspace
19195932271
00:02:04
Case Information
Connected
(2)
CONTACT
Characters Remaining: 160

TWORK MSG: You replied
 the word "stop" which
cks all texts sent from
 number.

t back "unstop" to
eive messages again.

10:30:51 AM
You entered tracking #9262420126101899933609. How may we help?

19195932271 10:31:42 AM
Stop

Maria Urban 10:32:04 AM
ok

19195932271 10:32:43 AM
Unstop

19195932271 10:32:53 AM
I am back

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- Tab Management
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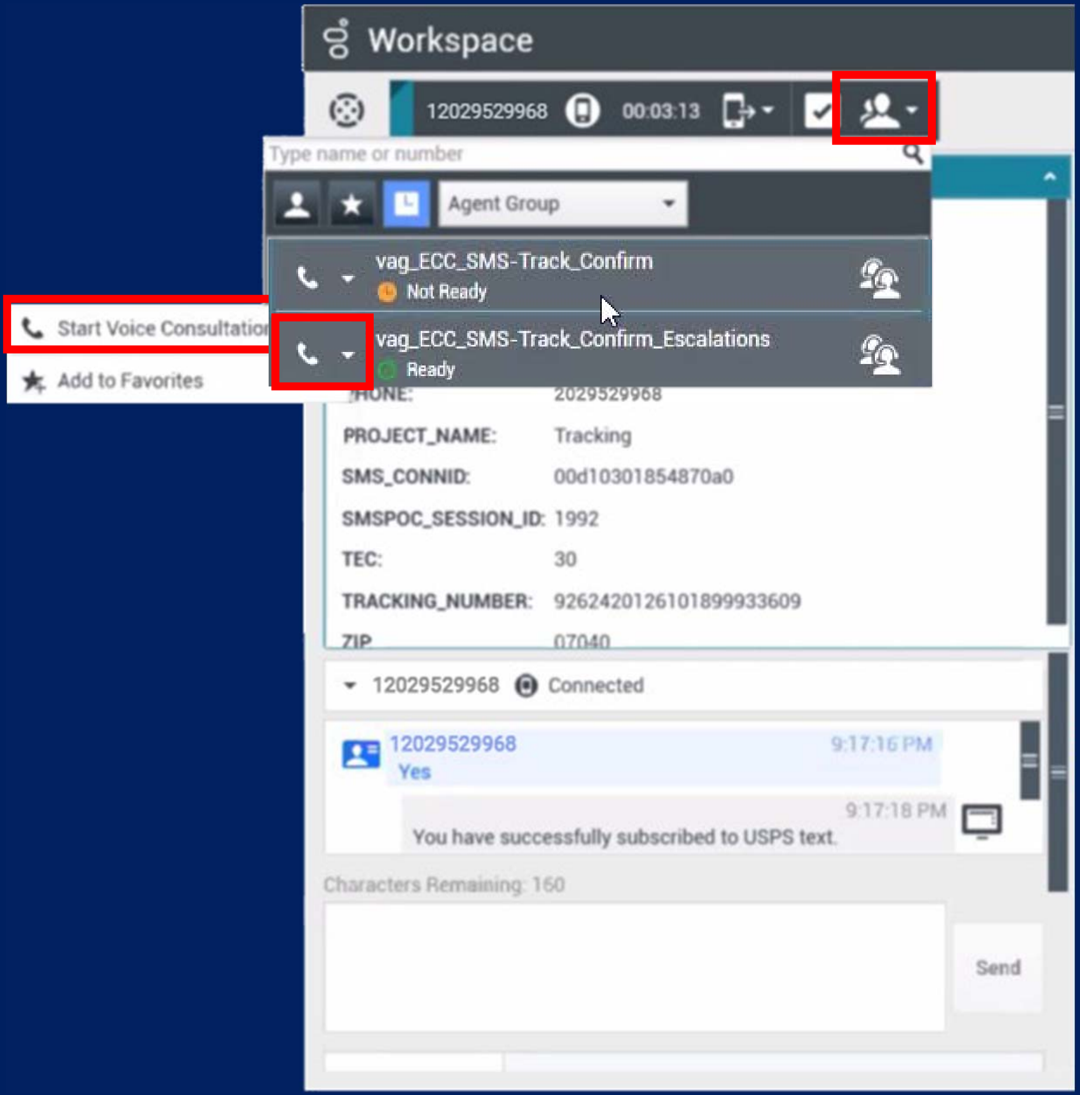
Using the Assist Queue


Workspace
12029529968
00:03:13
Type name or number
Agent Group
vag_ECC_SMS-Track_Confirm
Not Ready
vag_ECC_SMS-Track_Confirm_Escalations
Ready
Start Voice Consultatio
Add to Favorites
Characters Remaining: 160
Send

HONE: 2029529968
PROJECT_NAME: Tracking
SMS_CONNID: 00d10301854870a0
SMSPOC_SESSION_ID: 1992
TEC: 30
TRACKING_NUMBER: 9262420126101899933609
ZIP 07040

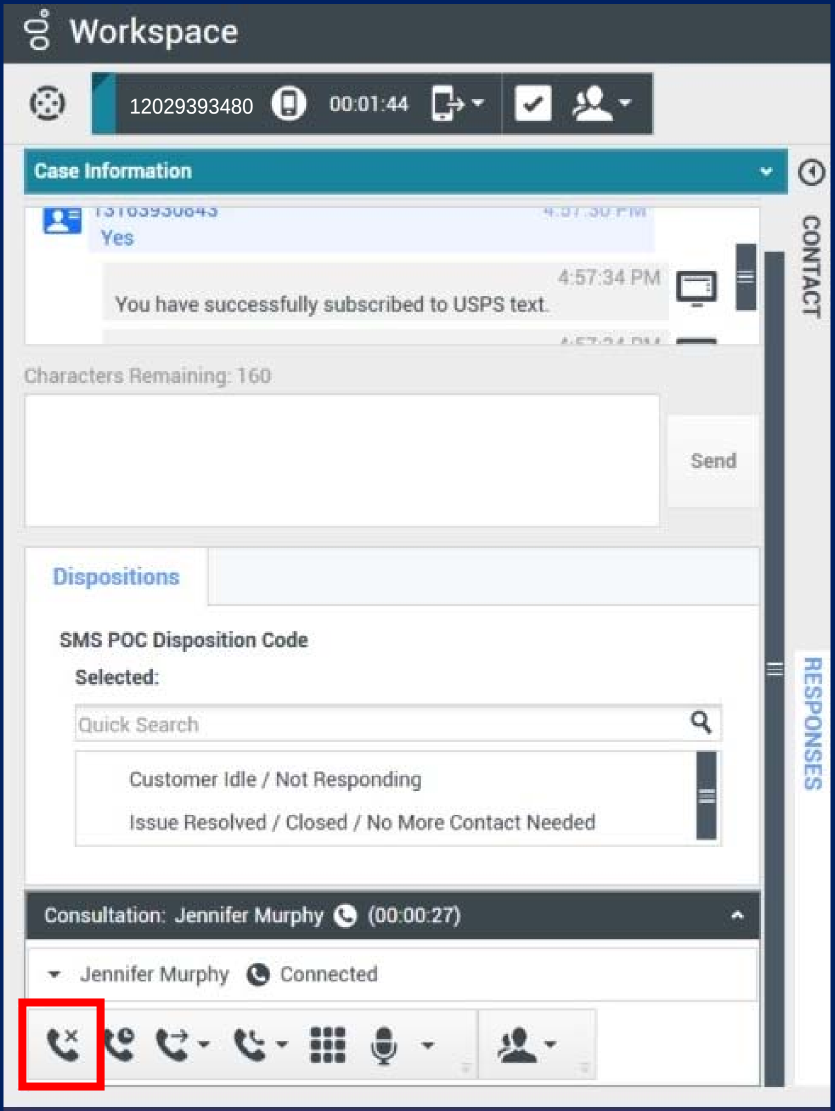
12029529968 Connected

12029529968 9:17:16 PM
Yes

9:17:18 PM
You have successfully subscribed to USPS text.

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

Ending the Assist Consult



Workspace
12029393480
00:01:44
Case Information
CONTACT
RESPONSES
Send
Dispositions

Yes

4:57:34 PM
You have successfully subscribed to USPS text.

Characters Remaining: 160

SMS POC Disposition Code

Selected:

Quick Search

Customer Idle / Not Responding

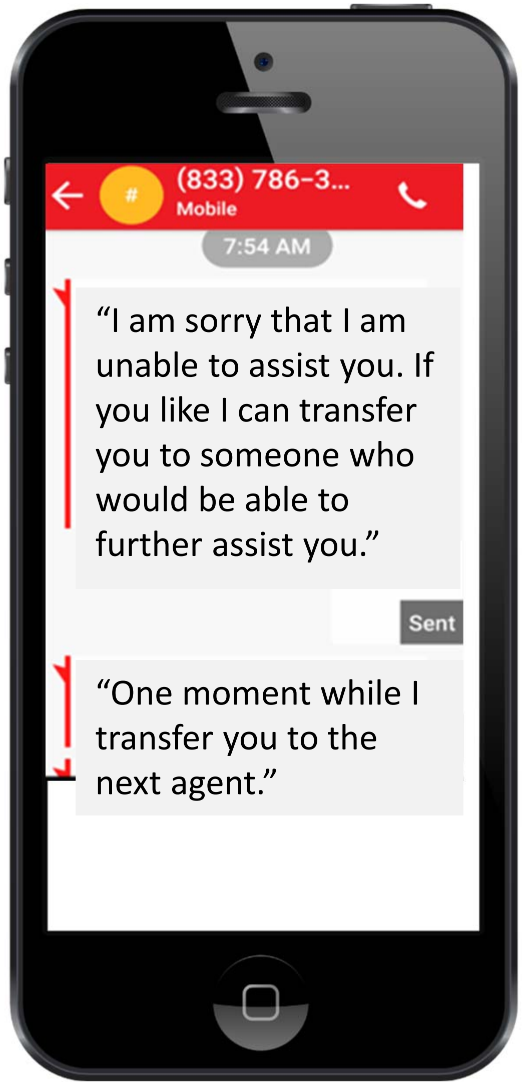
Issue Resolved / Closed / No More Contact Needed

Consultation: Jennifer Murphy (00:00:27)

Jennifer Murphy Connected

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

Escalate to Lead Agent



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

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

There will be times when you need to Transfer the customer to the Lead Escalation Queue.

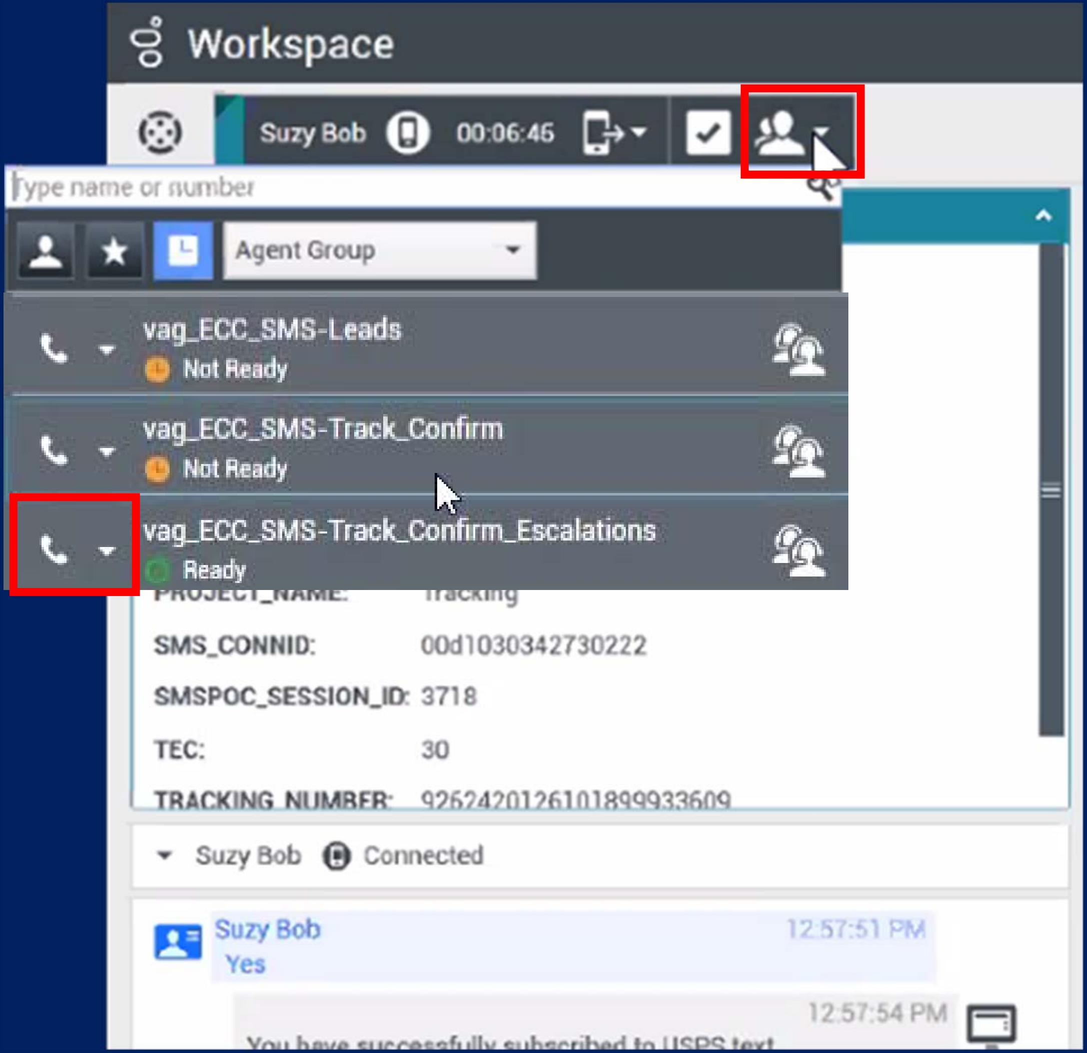
Select the following Standard Messages prior to transfer:

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

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

UNITED STATES POSTAL SERVICE

Escalation Process / SMS Warm Transfer (1 of 2)


Workspace
Suzy Bob
00:06:46
Type name or number
Agent Group
vag_ECC_SMS-Leads
Not Ready
vag_ECC_SMS-Track_Confirm
Not Ready
vag_ECC_SMS-Track_Confirm_Escalations
Ready
Suzy Bob
Connected

PROJECT_NAME: Tracking

SMS_CONNID: 00d1030342730222

SMSPOC_SESSION_ID: 3718

TEC: 30

TRACKING_NUMBER: 9262420126101899933609

Suzy Bob 12:57:51 PM
Yes

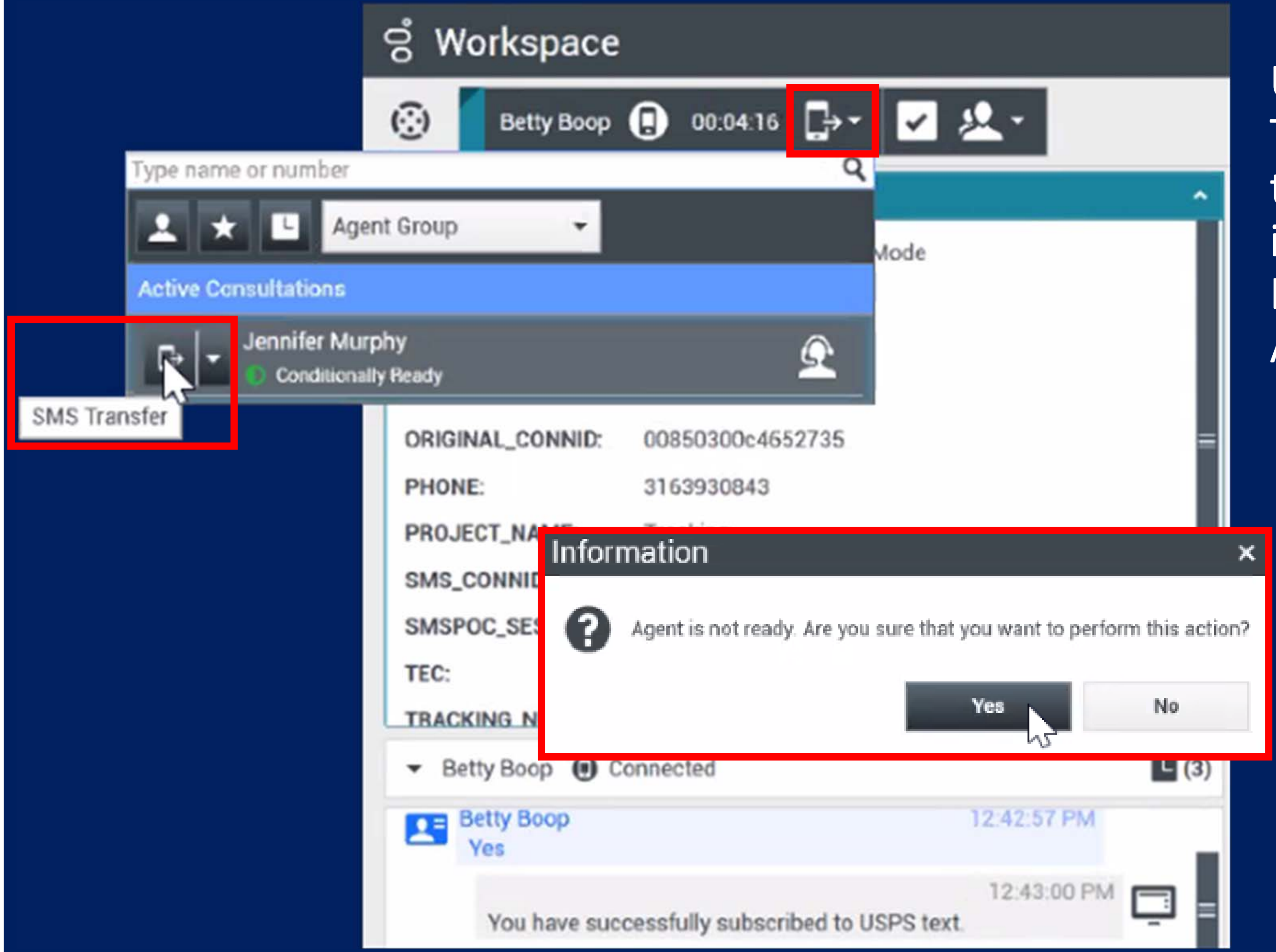
12:57:54 PM
You have successfully subscribed to USPS text

Use the Consultation button to contact a Lead Agent in the queue.

Do not select the ECC_SMS_Leads.

UNITED STATES POSTAL SERVICE

Escalation Process / SMS Warm Transfer (2 of 2)


Workspace
Betty Boop
00:04:16
Type name or number
Agent Group
Active Consultations
Jennifer Murphy
Conditionally Ready
SMS Transfer
Mode
Information
Yes
No
Betty Boop
Connected
(3)

ORIGINAL_CONNID: 00850300c4652735
PHONE: 3163930843
PROJECT_NA
SMS_CONNI
SMSPOC_SE
TEC:
TRACKING_N

Agent is not ready. Are you sure that you want to perform this action?

Betty Boop 12:42:57 PM
Yes

12:43:00 PM
You have successfully subscribed to USPS text.

Use the SMS Transfer icon to transfer the interaction to the Lead Agent in the Active Consultation.

Click “Yes” to finish transferring the interaction.

Knowledge Check: Add a Stamp! (1 of 2)

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

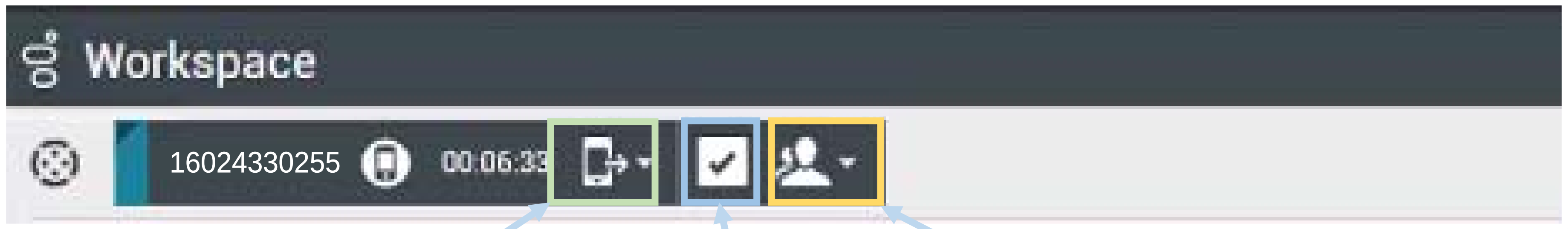
Answer the question by typing free text response, making sure that there are no spelling errors.

Select the appropriate Standard Response and edit it with the Post Office information.

Transfer the customer to another Agent.

Knowledge Check: Add a Stamp! (2 of 2)

Which of the following icons would you use to transfer the escalation?


Workspace
16024330255
00:06:33

Option 1
SMS Transfer

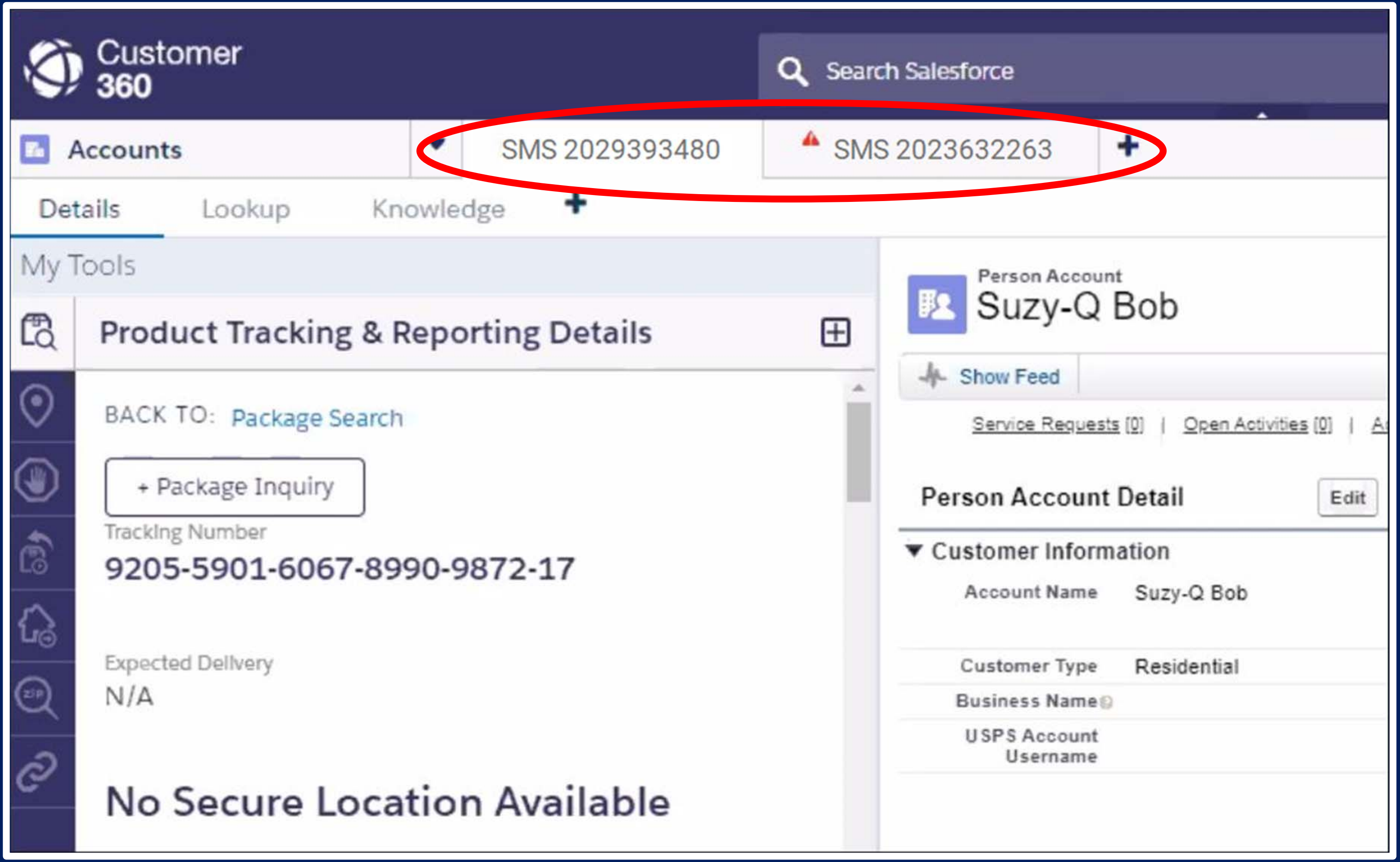
Option 2
Done

Option 3
Consultation

What's Next?

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

Assisting Multiple Customers


Customer 360
Search Salesforce
Accounts
SMS 2029393480
SMS 2023632263
Details
Lookup
Knowledge
My Tools
Show Feed
Service Requests [0]
Open Activities [0]
+ Package Inquiry
Edit

Product Tracking & Reporting Details

BACK TO: Package Search

Tracking Number
9205-5901-6067-8990-9872-17

Expected Delivery
N/A

No Secure Location Available

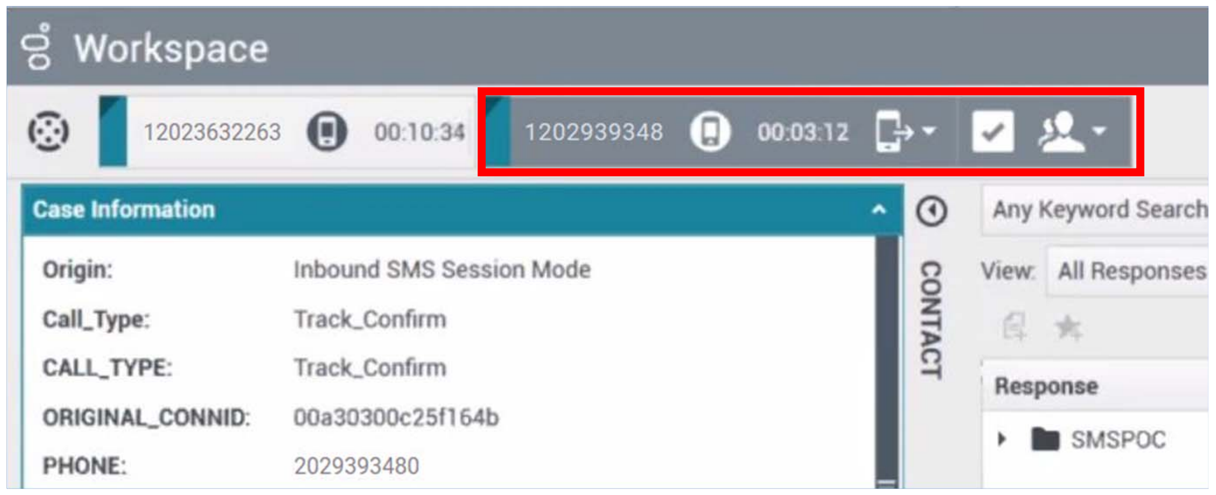
Person Account
Suzy-Q Bob

Person Account Detail

Customer Information

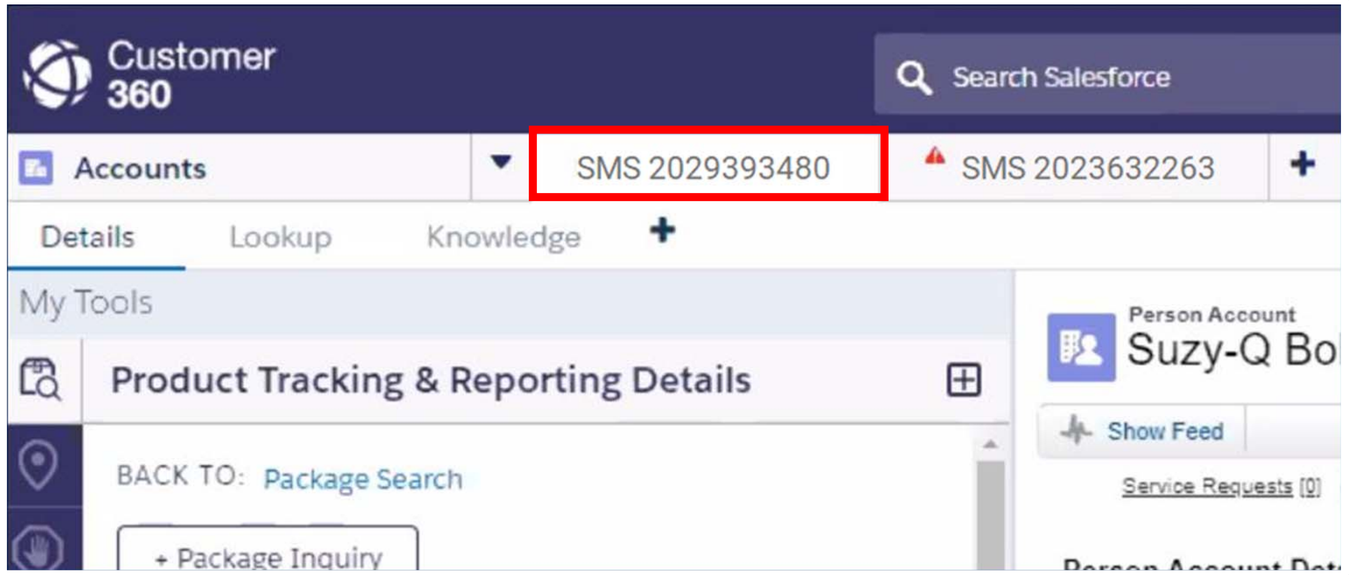
Account Name	Suzy-Q Bob
Customer Type	Residential
Business Name	
USPS Account Username	

Tabs in Sync



Workspace
12023632263
00:10:34
1202939348
00:03:12
Case Information
CONTACT
Any Keyword Search
View: All Responses
Response
SMSPOC

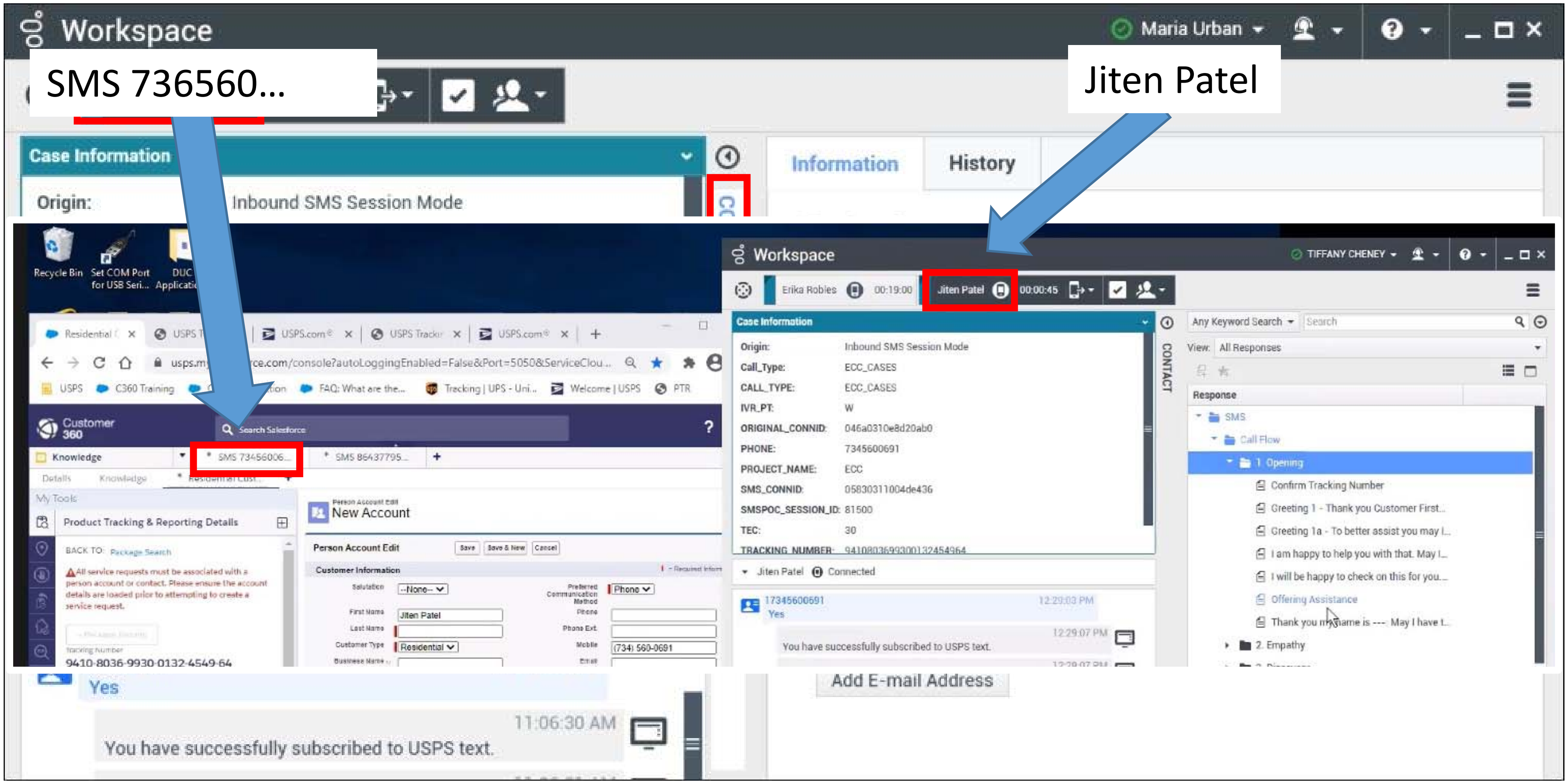
Origin: Inbound SMS Session Mode
Call_Type: Track_Confirm
CALL_TYPE: Track_Confirm
ORIGINAL_CONNID: 00a30300c25f164b
PHONE: 2029393480



Customer 360
Search Salesforce
Accounts
SMS 2029393480
SMS 2023632263
Details
Lookup
Knowledge
My Tools
Product Tracking & Reporting Details
BACK TO: Package Search
+ Package Inquiry
Person Account
Suzy-Q Bo
Show Feed
Service Requests [0]

SMS Save Contact

Copying the customer’s name into Contacts is recommended, but not required. If this field is used, however, the customer’s **first name** is required.



SMS 736560…

Jiten Patel

Workspace

Case Information

Origin: Inbound SMS Session Mode

Erika Robles 00:19:00 | Jiten Patel 00:00:45

Call_Type: ECC_CASES
CALL_TYPE: ECC_CASES
IVR_PT: W
ORIGINAL_CONNID: 046a0310e8d20ab0
PHONE: 7345600691
PROJECT_NAME: ECC
SMS_CONNID: 05830311004de436
SMSPOC_SESSION_ID: 81500
TEC: 30
TRACKING_NUMBER: 9410803699300132454964

Jiten Patel Connected

17345600691 12:29:03 PM
Yes

12:29:07 PM
You have successfully subscribed to USPS text.

Person Account Edit
New Account

Salutation: --None--
First Name: Jiten Patel
Customer Type: Residential
Preferred Communication Method: Phone
Mobile: (734) 560-0691

All service requests must be associated with a person account or contact. Please ensure the account details are loaded prior to attempting to create a service request.

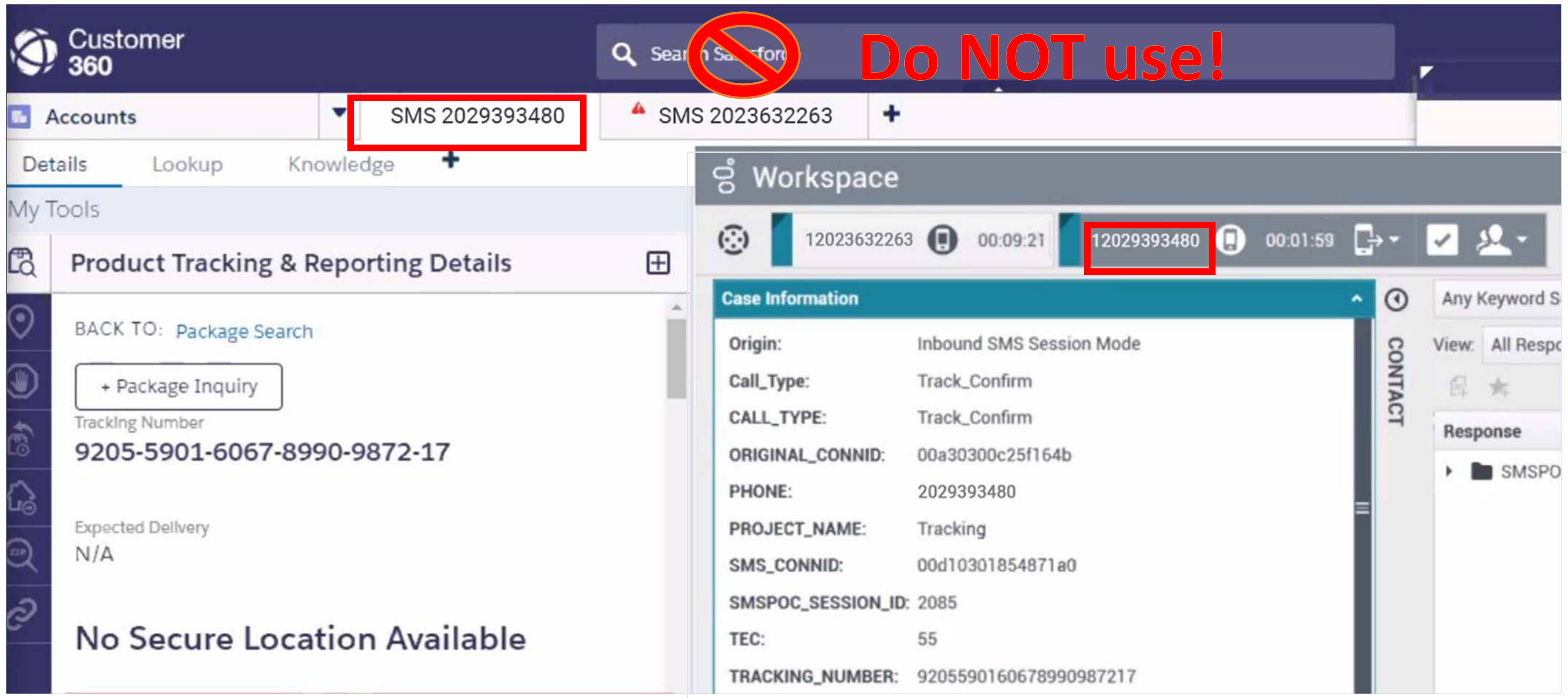
Tracking Number: 9410 8036 9930 0132 4549 64

11:06:30 AM
You have successfully subscribed to USPS text.

Workspace
Maria Urban
TIFFANY CHENEY
Information
History
CONTACT
Add E-mail Address
Customer 360
Search Salesforce
Knowledge
SMS 73456006…
SMS 86437795…
Product Tracking & Reporting Details
Save
Save & New
Cancel
Any Keyword Search
View: All Responses
Response
SMS
Call Flow
1. Opening
Confirm Tracking Number
Greeting 1 - Thank you Customer First…
Greeting 1a - To better assist you may I…
I am happy to help you with that. May I…
I will be happy to check on this for you…
Offering Assistance
Thank you my name is --- May I have t…
2. Empathy
Yes

UNITED STATES POSTAL SERVICE

Tabs Out of Sync


Customer 360
Search Salesforce
Do NOT use!
Accounts
SMS 2029393480
SMS 2023632263
Details
Lookup
Knowledge
My Tools
Workspace
12023632263
00:09:21
12029393480
00:01:59
Any Keyword S
View:
All Respo
CONTACT
Response
SMSPO

Product Tracking & Reporting Details

BACK TO: Package Search

+ Package Inquiry

Tracking Number
9205-5901-6067-8990-9872-17

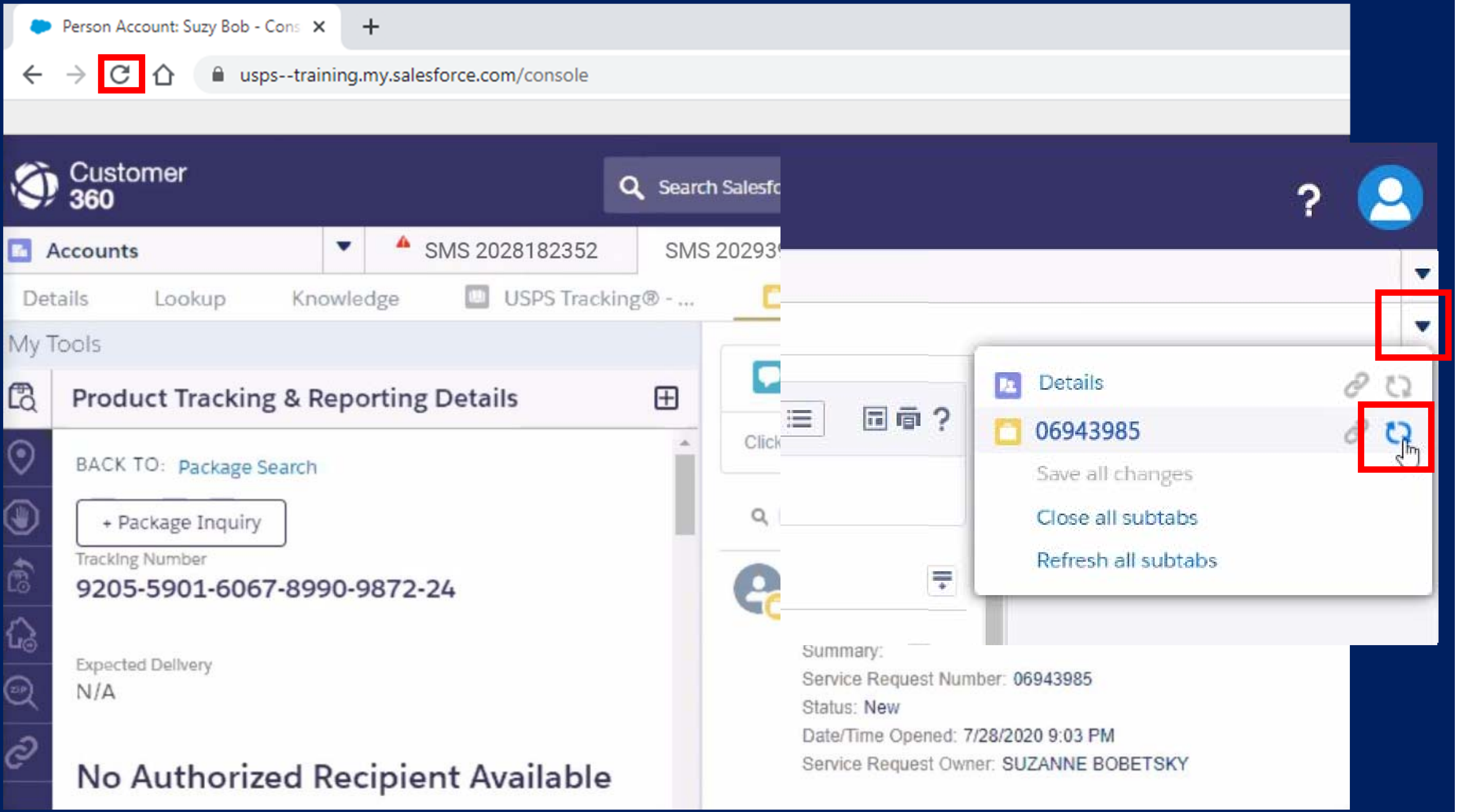
Expected Delivery
N/A

No Secure Location Available

Case Information

Origin: Inbound SMS Session Mode
Call_Type: Track_Confirm
CALL_TYPE: Track_Confirm
ORIGINAL_CONNID: 00a30300c25f164b
PHONE: 2029393480
PROJECT_NAME: Tracking
SMS_CONNID: 00d10301854871a0
SMSPOC_SESSION_ID: 2085
TEC: 55
TRACKING_NUMBER: 9205590160678990987217

Data Out of Sync


Person Account: Suzy Bob - Cons
usps--training.my.salesforce.com/console
Customer 360
Search Salesfo
Accounts
SMS 2028182352
SMS 20293
Details
Lookup
Knowledge
USPS Tracking® - ...
My Tools
Product Tracking & Reporting Details
BACK TO: Package Search
+ Package Inquiry
Click
Details
06943985
Save all changes
Close all subtabs
Refresh all subtabs

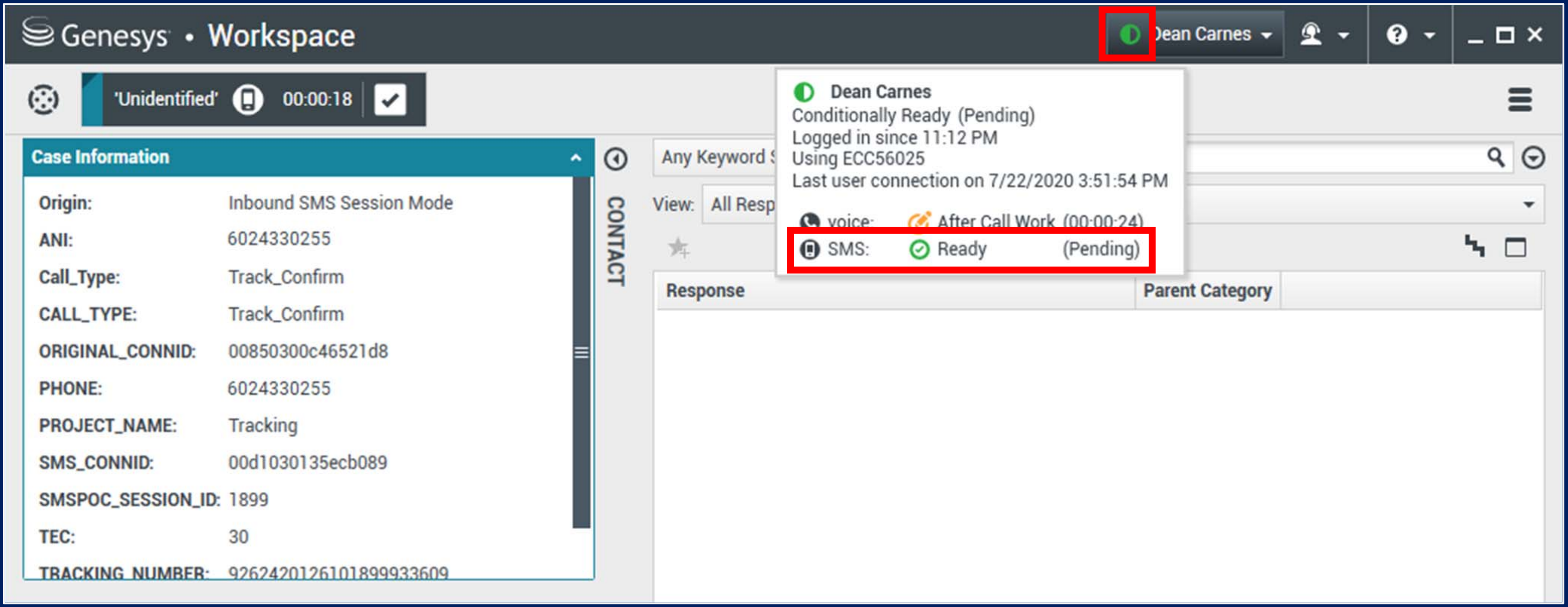
Tracking Number
9205-5901-6067-8990-9872-24

Expected Delivery
N/A

No Authorized Recipient Available

Summary:
Service Request Number: 06943985
Status: New
Date/Time Opened: 7/28/2020 9:03 PM
Service Request Owner: SUZANNE BOBETSKY

Ready (Pending) Status


Genesys • Workspace
Dean Carnes
'Unidentified'
00:00:18
Case Information
CONTACT
Any Keyword
View:
All Resp
Response
Parent Category

Dean Carnes
Conditionally Ready (Pending)
Logged in since 11:12 PM
Using ECC56025
Last user connection on 7/22/2020 3:51:54 PM

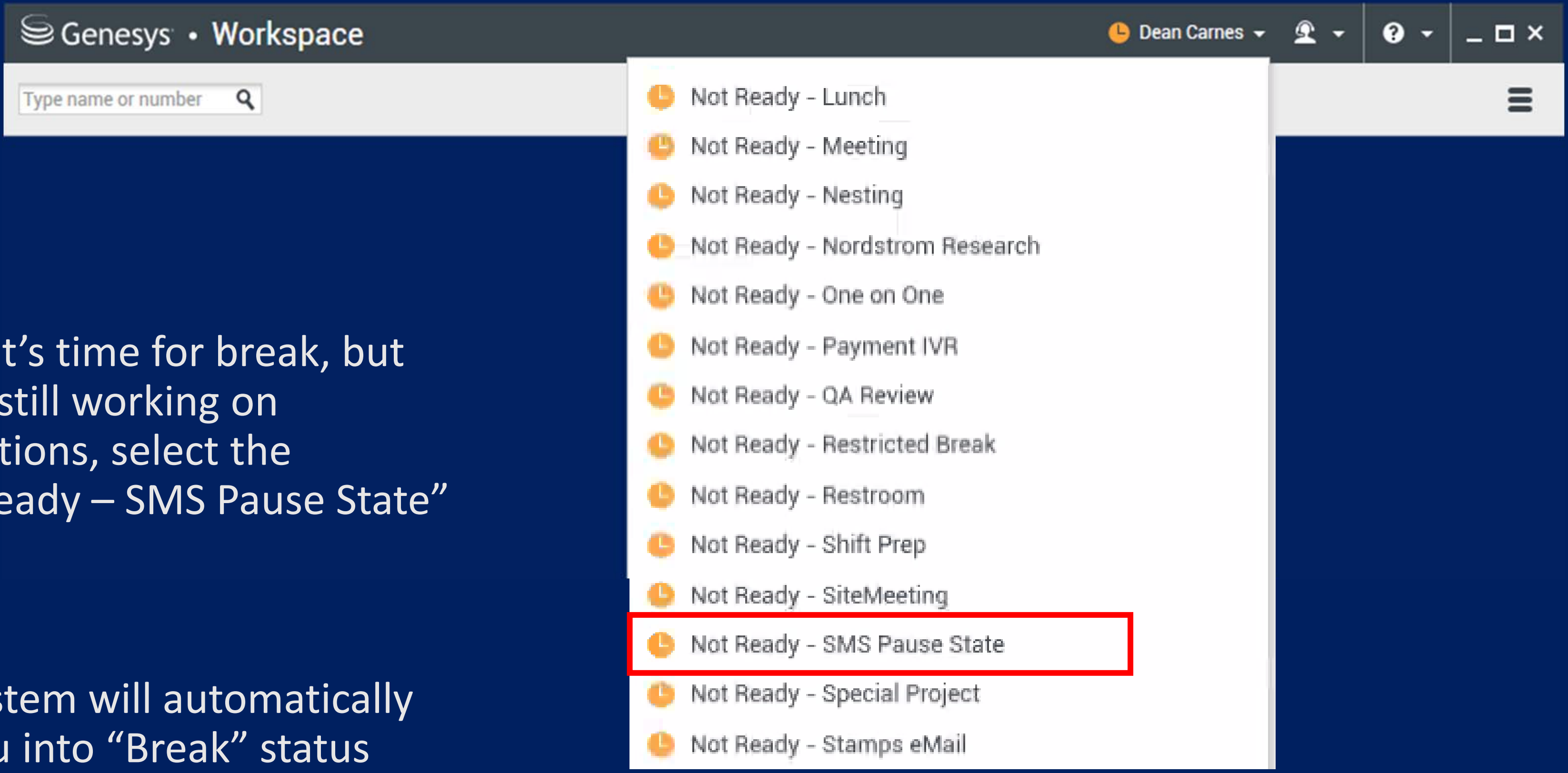
voice: After Call Work (00:00:24)
SMS: Ready (Pending)

Origin:	Inbound SMS Session Mode
ANI:	6024330255
Call_Type:	Track_Confirm
CALL_TYPE:	Track_Confirm
ORIGINAL_CONNID:	00850300c46521d8
PHONE:	6024330255
PROJECT_NAME:	Tracking
SMS_CONNID:	00d1030135ecb089
SMSPOC_SESSION_ID:	1899
TEC:	30
TRACKING_NUMBER:	9262420126101899933609

SMS Pause State

When it's time for break, but you're still working on interactions, select the "Not Ready – SMS Pause State" status.

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


Genesys • Workspace
Dean Carnes
Type name or number
Not Ready - Lunch
Not Ready - Meeting
Not Ready - Nesting
Not Ready - Nordstrom Research
Not Ready - One on One
Not Ready - Payment IVR
Not Ready - QA Review
Not Ready - Restricted Break
Not Ready - Restroom
Not Ready - Shift Prep
Not Ready - SiteMeeting
Not Ready - SMS Pause State
Not Ready - Special Project
Not Ready - Stamps eMail

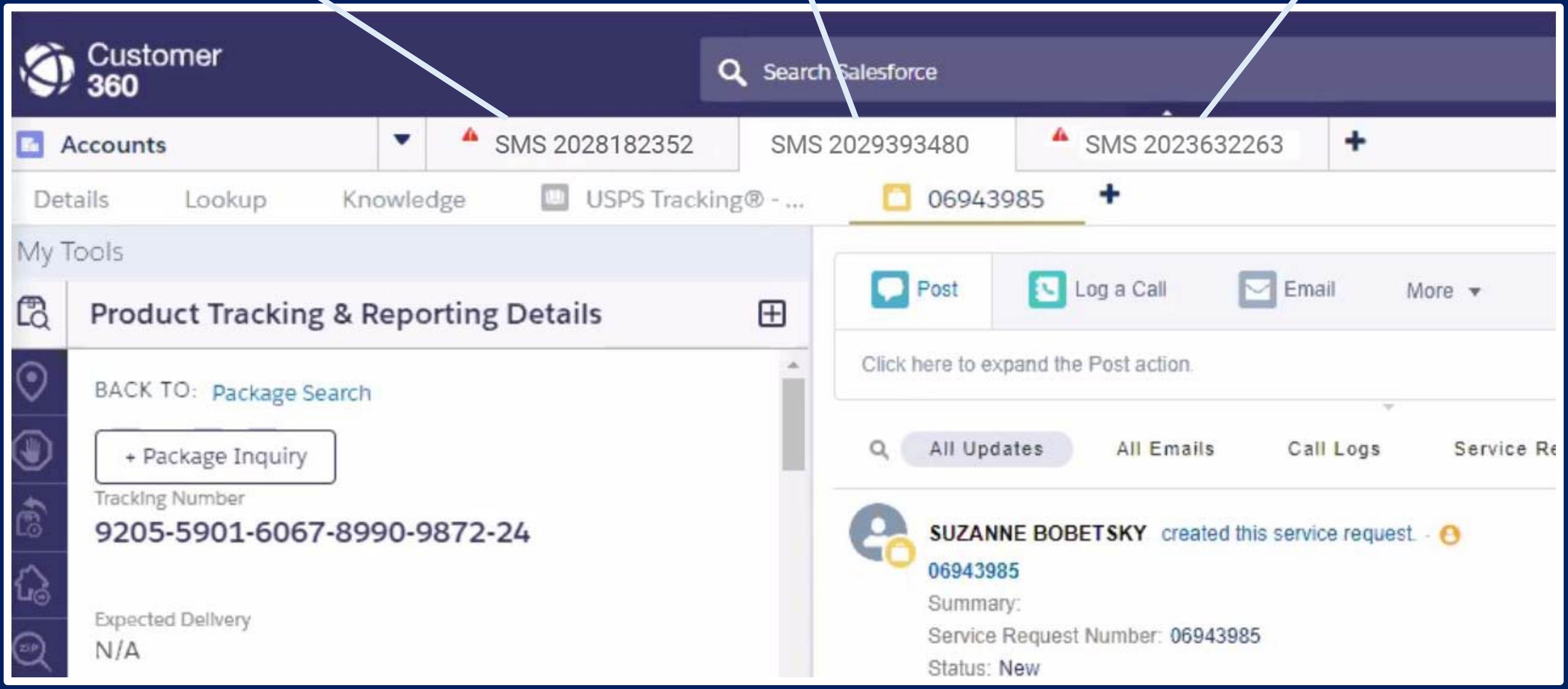
UNITED STATES POSTAL SERVICE

Knowledge Check: Add a Stamp!

SMS (202) 818-2352

SMS (202) 939-3480

SMS (202) 363-2263


Customer 360
Search Salesforce
Accounts
SMS 2028182352
SMS 2029393480
SMS 2023632263
Details
Lookup
Knowledge
USPS Tracking® - ...
06943985
My Tools
Product Tracking & Reporting Details
Post
Log a Call
Email
More
All Updates
All Emails
Call Logs
Service Re

BACK TO: Package Search

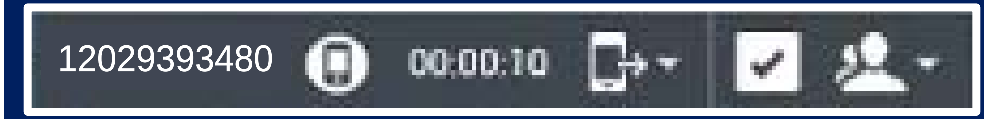
+ Package Inquiry

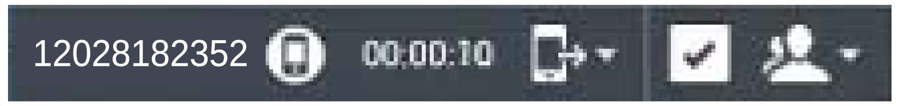
Tracking Number
9205-5901-6067-8990-9872-24

Expected Delivery
N/A

Click here to expand the Post action.

SUZANNE BOBETSKY created this service request.
06943985
Summary:
Service Request Number: 06943985
Status: New


12029393480 00:00:10


12028182352 00:00:10

Video: Handling Multiple Interactions

Video

ECC

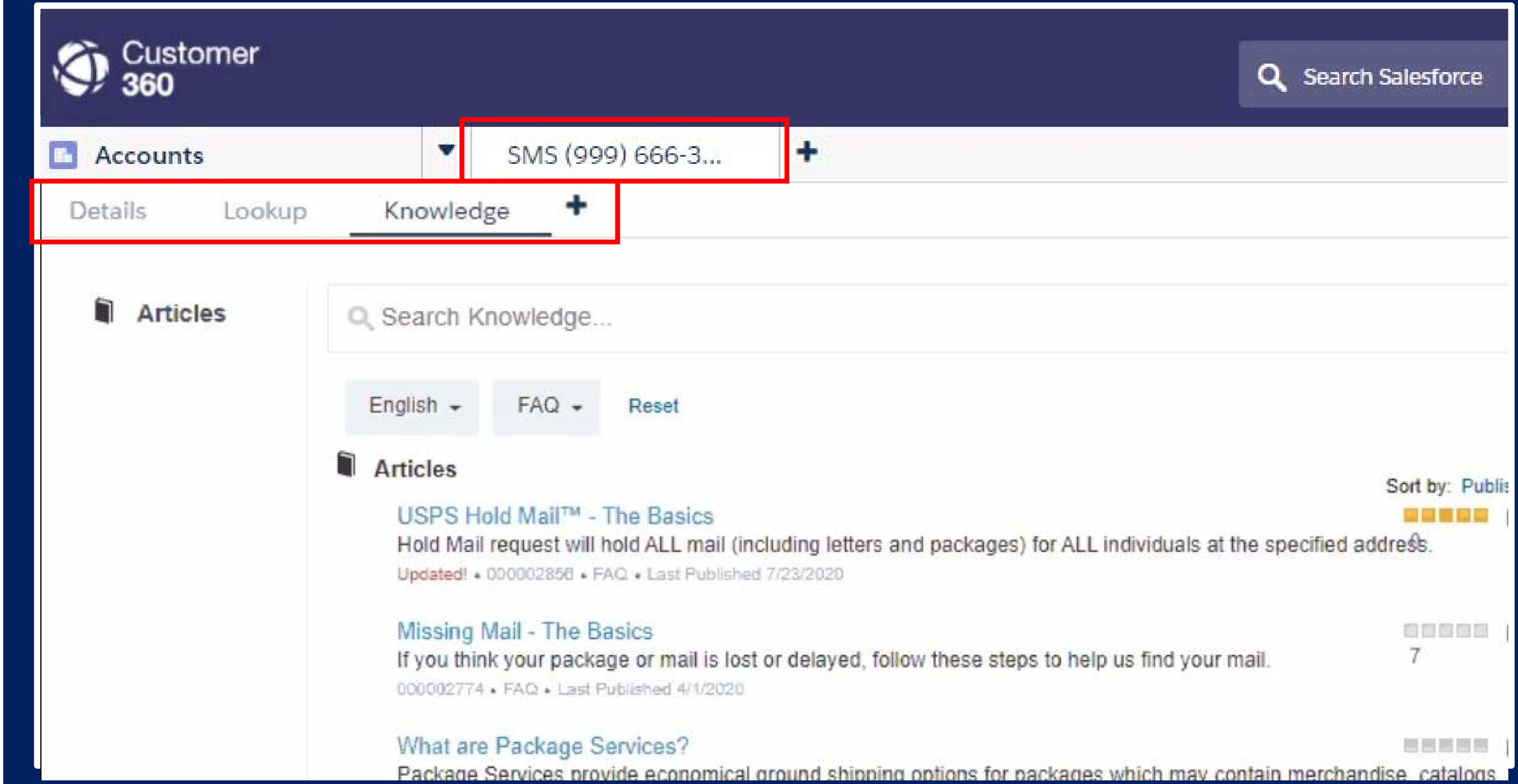
SMS - Agent Handling
Multiple Interactions

What's Next?

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

UNITED STATES POSTAL SERVICE

Tab Management in C360


Customer 360
Search Salesforce
Accounts
SMS (999) 666-3...
Details
Lookup
Knowledge
Articles
Search Knowledge...
English
FAQ
Reset
Sort by: Publis

Articles

USPS Hold Mail™ - The Basics

Hold Mail request will hold ALL mail (including letters and packages) for ALL individuals at the specified address.

Updated! • 000002856 • FAQ • Last Published 7/23/2020

Missing Mail - The Basics

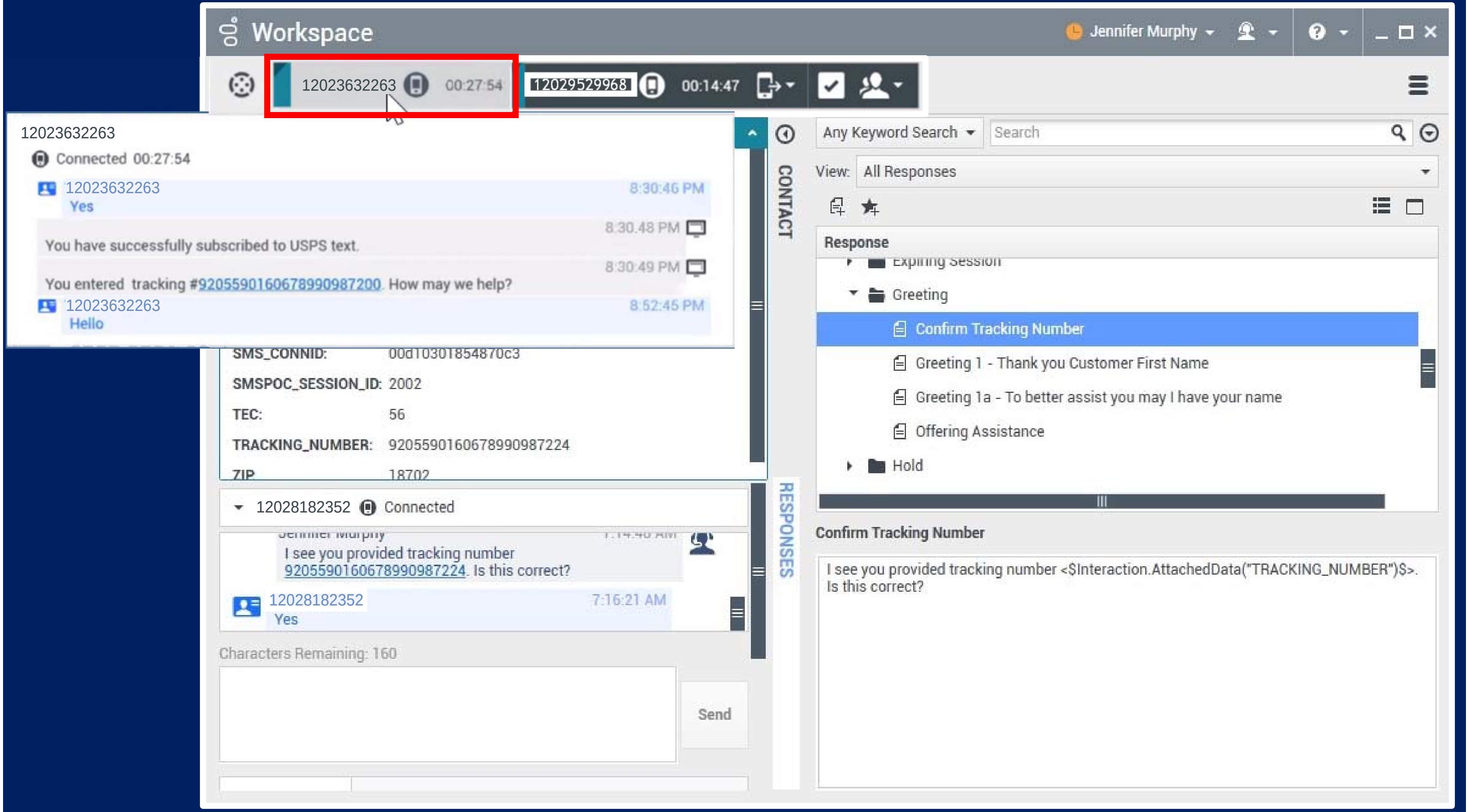
If you think your package or mail is lost or delayed, follow these steps to help us find your mail.

000002774 • FAQ • Last Published 4/1/2020

What are Package Services?

Package Services provide economical ground shipping options for packages which may contain merchandise, catalogs

Message Alerts – Tab Management in SMS


Workspace
Jennifer Murphy
12023632263 00:27:54
12029529968 00:14:47
CONTACT
RESPONSES
Any Keyword Search
Search
View: All Responses
Response
Expiring Session
Greeting
Confirm Tracking Number
Greeting 1 - Thank you Customer First Name
Greeting 1a - To better assist you may I have your name
Offering Assistance
Hold
Send

12023632263

Connected 00:27:54

12023632263 8:30:46 PM
Yes

8:30:48 PM
You have successfully subscribed to USPS text.

8:30:49 PM
You entered tracking #9205590160678990987200. How may we help?

12023632263 8:52:45 PM
Hello

SMS_CONNID: 00d10301854870c3
SMSPOC_SESSION_ID: 2002
TEC: 56
TRACKING_NUMBER: 9205590160678990987224
ZIP 18702

12028182352 Connected

Jennifer Murphy
I see you provided tracking number 9205590160678990987224. Is this correct?

12028182352 7:16:21 AM
Yes

Characters Remaining: 160

Confirm Tracking Number

I see you provided tracking number <$Interaction.AttachedData("TRACKING_NUMBER")$>. Is this correct?

UNITED STATES POSTAL SERVICE

Knowledge Check: Add a Stamp!

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

Your message has a spelling error.

The customer was sent a system-generated message.

You forgot to click the Done button.

The customer has sent a text message.

UNITED STATES POSTAL SERVICE

What’s Next?

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

SMS Interactions will undergo Quality reviews -- the same as voice interactions

Quality: SMS Call Handling > QA Scorecard for Voice and Chat

SMS QSDD

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

Did agent open the interaction in accordance with organizational standards?

SMS QSDD Items (1 of 4)

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

SMS QSDD Items (2 of 4)

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

SMS QSDD Items (3 of 4)

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

SMS QSDD Items (4 of 4)

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

UNITED STATES POSTAL SERVICE

SMS Quality Knowledge Check

True or False? It is appropriate to use all capitals to convey emphasis or emotion.

a. True [✓ b. False]

True or False? You should paraphrase the customer's issue to display understanding of their concerns.

[✓ a. True] b. False

True or False? You should ask tactful, clarifying questions only if you are going to escalate the call.

a. True [✓ b. False]

True or False? It is appropriate to end an SMS interaction with a customer by typing "TTFN" and a waving hand emoji.

a. True [✓ b. False]

Questions

Questions?

What’s Next?

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

Useful Tips

Tools for Handling Responses

- Sticky notes
- One Note

Tips for Reducing Handling Time

- Copy and paste the last scan event from C360 tracking into the SMS message.
- Copy and paste the customer's name from the message into the Contacts tab and name fields
- Hover over the second interaction tab to quickly view the status
- Move SR creation response into Preview panel, complete SR in C360, copy SR number into message and send to the customer

Rolling Over Tabs

Video

ECC

SMS - Tab Rollover

SMS Responses Sources

Video

ECC

SMS Response Sources

Copy Information From C360 into SMS Message

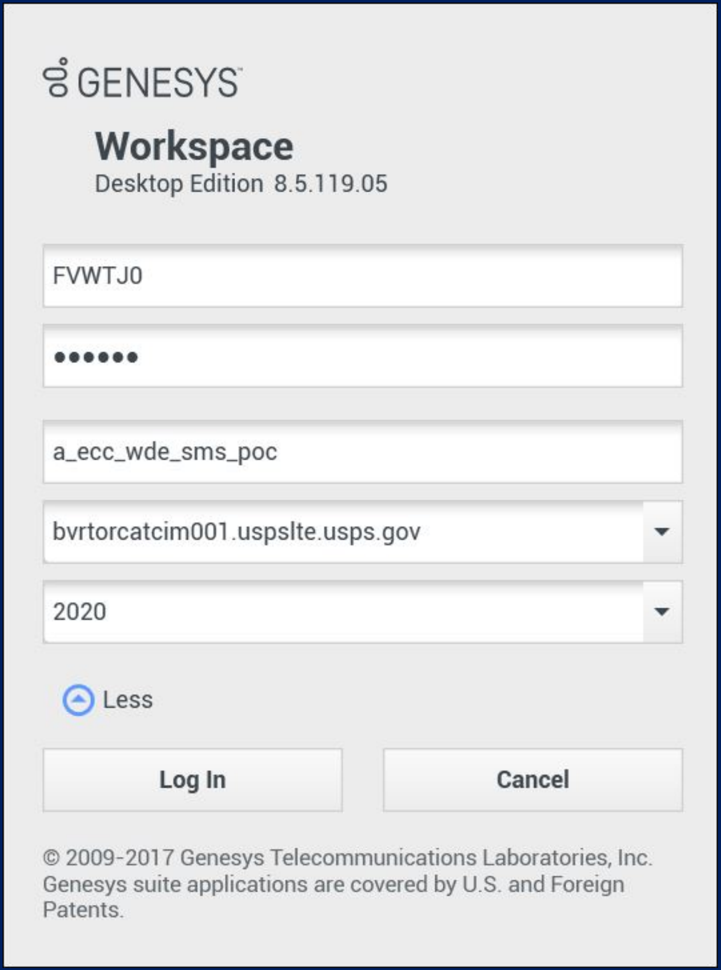
Video

SMS - Copying Information from C360 Tracking into SMS Message

Review

Demo

Hidden Slide: Logging in to SMS WDE CAT for practice


GENESYS

Workspace

Desktop Edition 8.5.119.05

FVWTJ0

••••••

a_ecc_wde_sms_poc

bvrtorcatcim001.uspslte.usps.gov

2020

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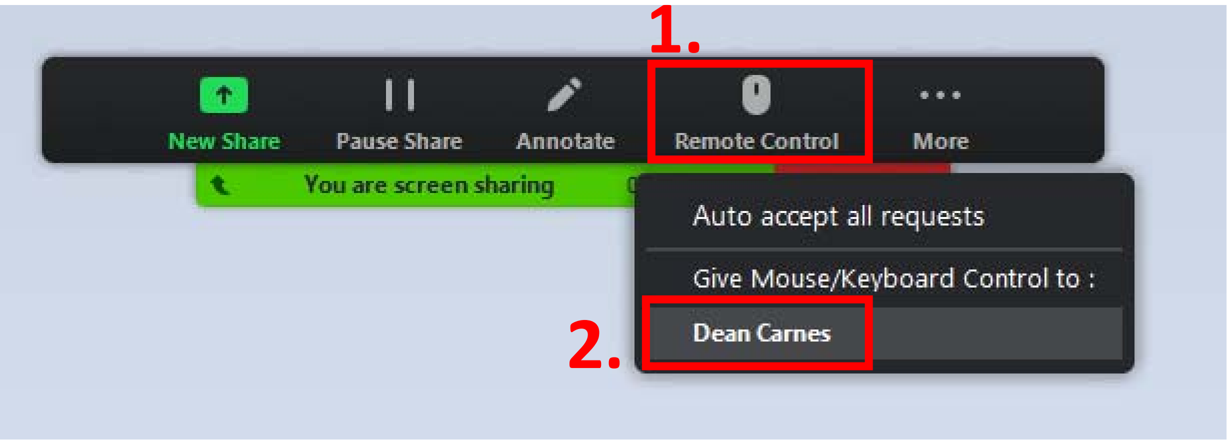
Use this information to tell the Agents how to login to the CAT environment for practice:

Username:	ACEID (All CAPS)
Password:	ACEID (All CAPS)
Application Name:	a_ecc_wde_sms_poc
Host/Config:	bvrtorcatcim001.uspslte.usps.gov
Port:	2020

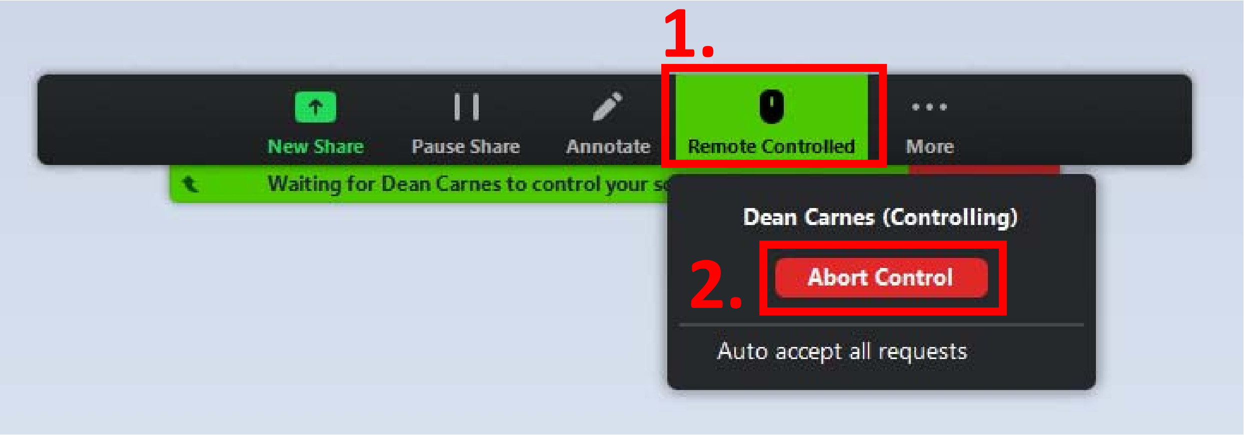
UNITED STATES POSTAL SERVICE

Hidden Slide: Assigning Remote Control to Agent and Resuming Control When Done


1.
New Share
Pause Share
Annotate
Remote Control
More
You are screen sharing
Auto accept all requests
Give Mouse/Keyboard Control to :
2.
Dean Carnes

Giving Remote Control

1. Click “Remote Control”.
2. Click the name of the Agent you want to grant control to.


1.
New Share
Pause Share
Annotate
Remote Controlled
More
Waiting for Dean Carnes to control your sc
Dean Carnes (Controlling)
2.
Abort Control
Auto accept all requests

Resuming Remote Control

1. Click “Remote Controlled”.
2. Click the “Abort Control” button.

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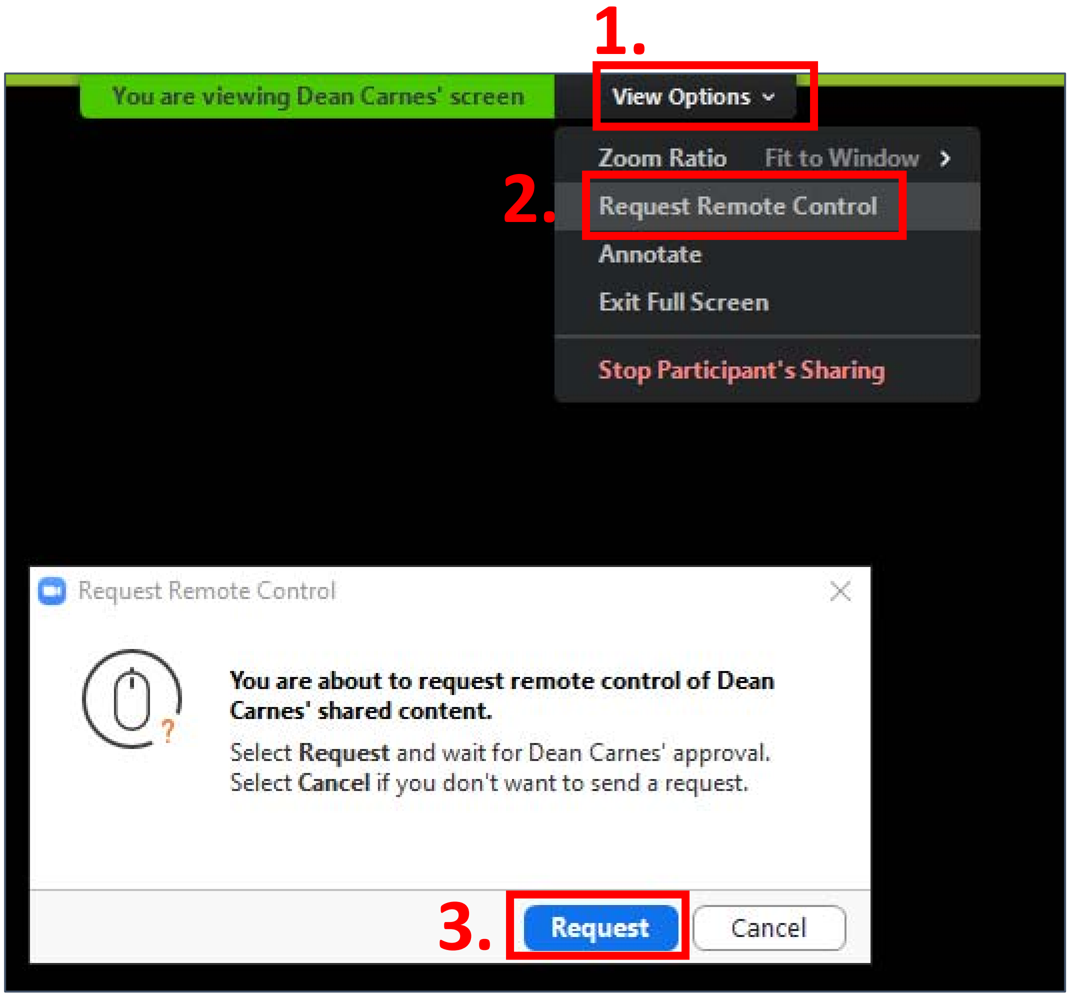
Hidden Slide: How Agents Request Remote Control

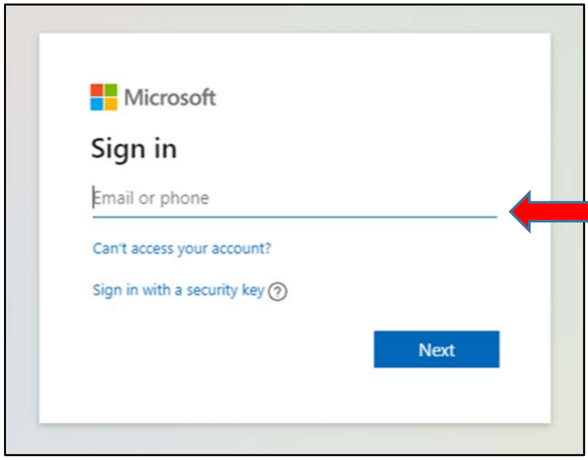

1.
You are viewing Dean Carnes' screen
View Options
Zoom Ratio
Fit to Window
2.
Request Remote Control
Annotate
Exit Full Screen
Stop Participant's Sharing
Request Remote Control
3.
Request
Cancel

You are about to request remote control of Dean Carnes' shared content.

Select **Request** and wait for Dean Carnes' approval.
Select **Cancel** if you don't want to send a request.

1. Click "View Options".
2. Click "Request Remote Control".
3. Click the "Request" button.

Sign In Instructions for Using Survey

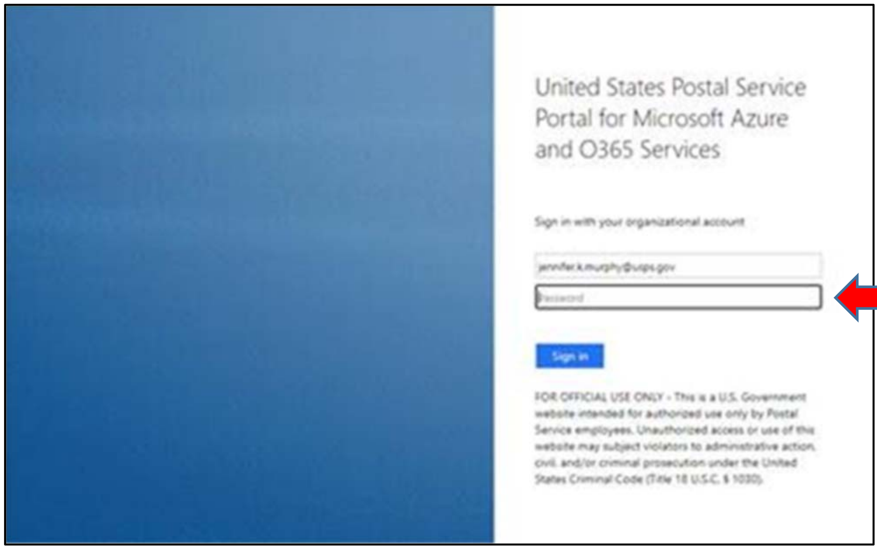


Microsoft

Sign in

Email or phone

1. Enter your usps.gov email address.



United States Postal Service Portal for Microsoft Azure and O365 Services

Sign in with your organizational account

jennifer.k.murphy@usps.gov

Password

FOR OFFICIAL USE ONLY - This is a U.S. Government website intended for authorized use only by Postal Service employees. Unauthorized access or use of this website may subject violators to administrative action, civil, and/or criminal prosecution under the United States Criminal Code (Title 18 U.S.C. § 1030).

2. Enter your ACE password.

Responses Activity

Directions:

1. Click the links in Chat to open the forms.
2. Go into breakout rooms.
3. Complete each form and select "Submit."
4. After submitting each form, click the "x" in the top right of the screen.
5. Agents using the link for the first time may be asked to sign in using their ACE ID and password.

Practice

UNITED STATES POSTAL SERVICE
Customer Care Center

SMS Training for Lead Agents

Instructor Preparation Notes

- Module: SMS Training for Lead Agents
- Module Duration: 1 hour

- This slide is hidden.
- Notes for Instructor preparation are in the Notes section of this hidden slide.

SMS Training

For Lead Agents

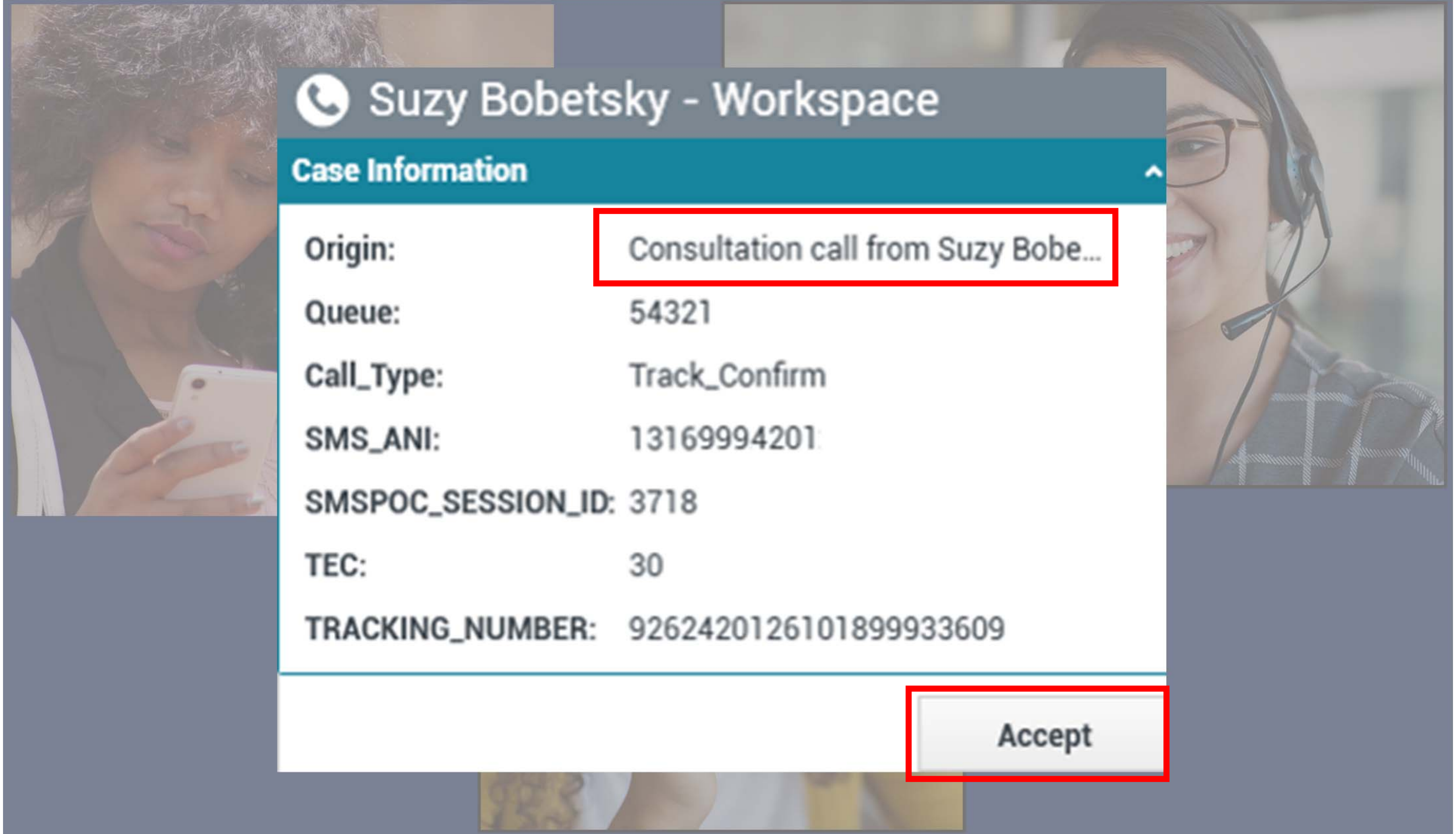
Learning Objectives

- Use the SMS WDE interface to accept escalation requests from SMS Agents.
- Use the SMS WDE interface to make outbound calls to customers to resolve escalation requests.

SMS Training for Lead Agents

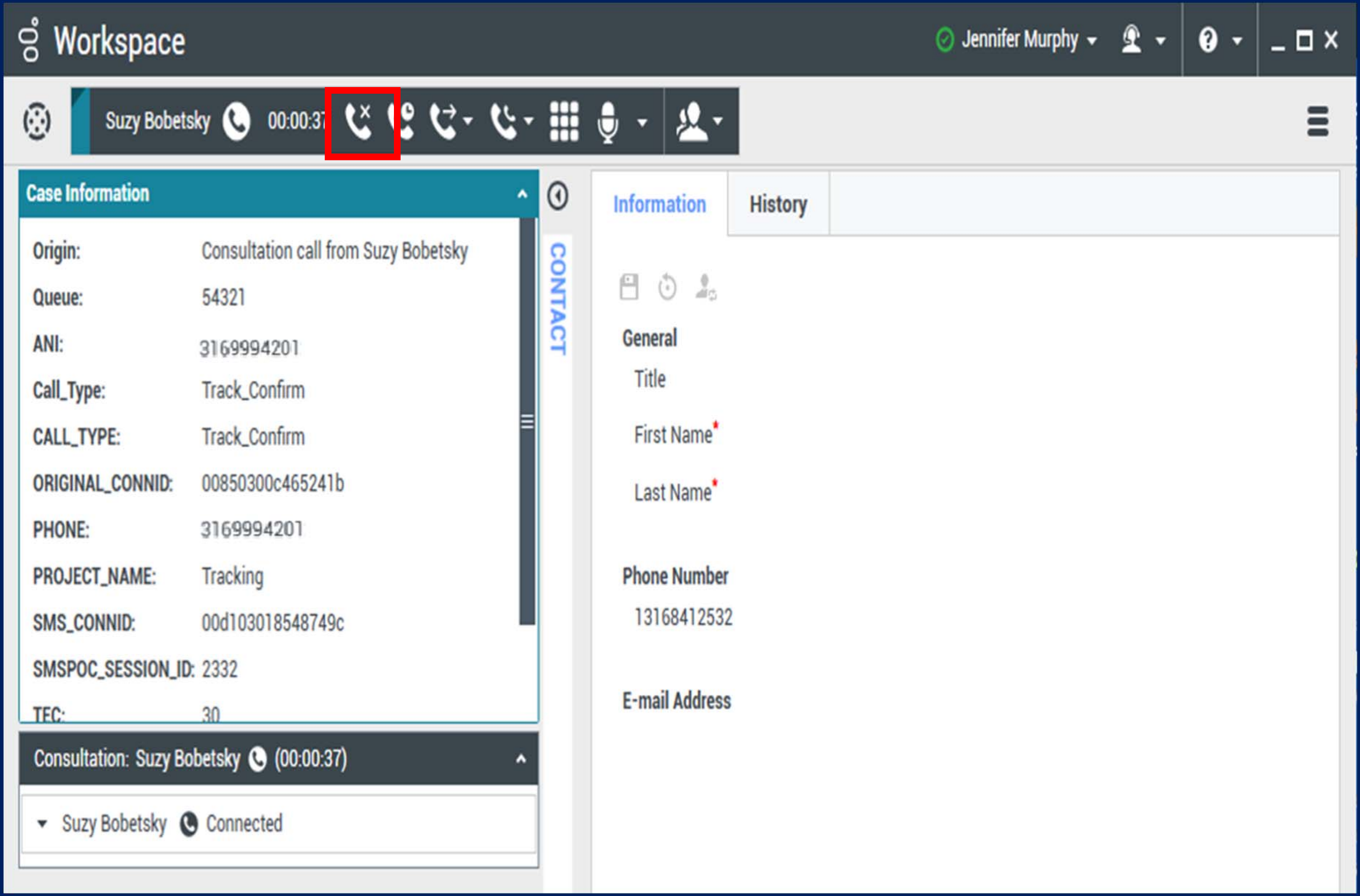
- Handling SMS Interaction Assist Calls
- Handling SMS Interaction Escalations
- Placing Outbound Calls
- Escalating to Supervisors
- Practice

Accepting SMS Interaction Assist Calls


Suzy Bobetsky - Workspace
Case Information
Accept

Origin: Consultation call from Suzy Bobe...
Queue: 54321
Call_Type: Track_Confirm
SMS_ANI: 13169994201
SMSPOC_SESSION_ID: 3718
TEC: 30
TRACKING_NUMBER: 9262420126101899933609

Handling SMS Interaction Assist Calls


Workspace
Jennifer Murphy
Suzy Bobetsky
00:00:37
Case Information
CONTACT
Information
History

Case Information

Origin: Consultation call from Suzy Bobetsky

Queue: 54321

ANI: 3169994201

Call_Type: Track_Confirm

CALL_TYPE: Track_Confirm

ORIGINAL_CONNID: 00850300c465241b

PHONE: 3169994201

PROJECT_NAME: Tracking

SMS_CONNID: 00d103018548749c

SMSPOC_SESSION_ID: 2332

TEC: 30

Consultation: Suzy Bobetsky (00:00:37)

Suzy Bobetsky Connected

General

Title

First Name*

Last Name*

Phone Number

13168412532

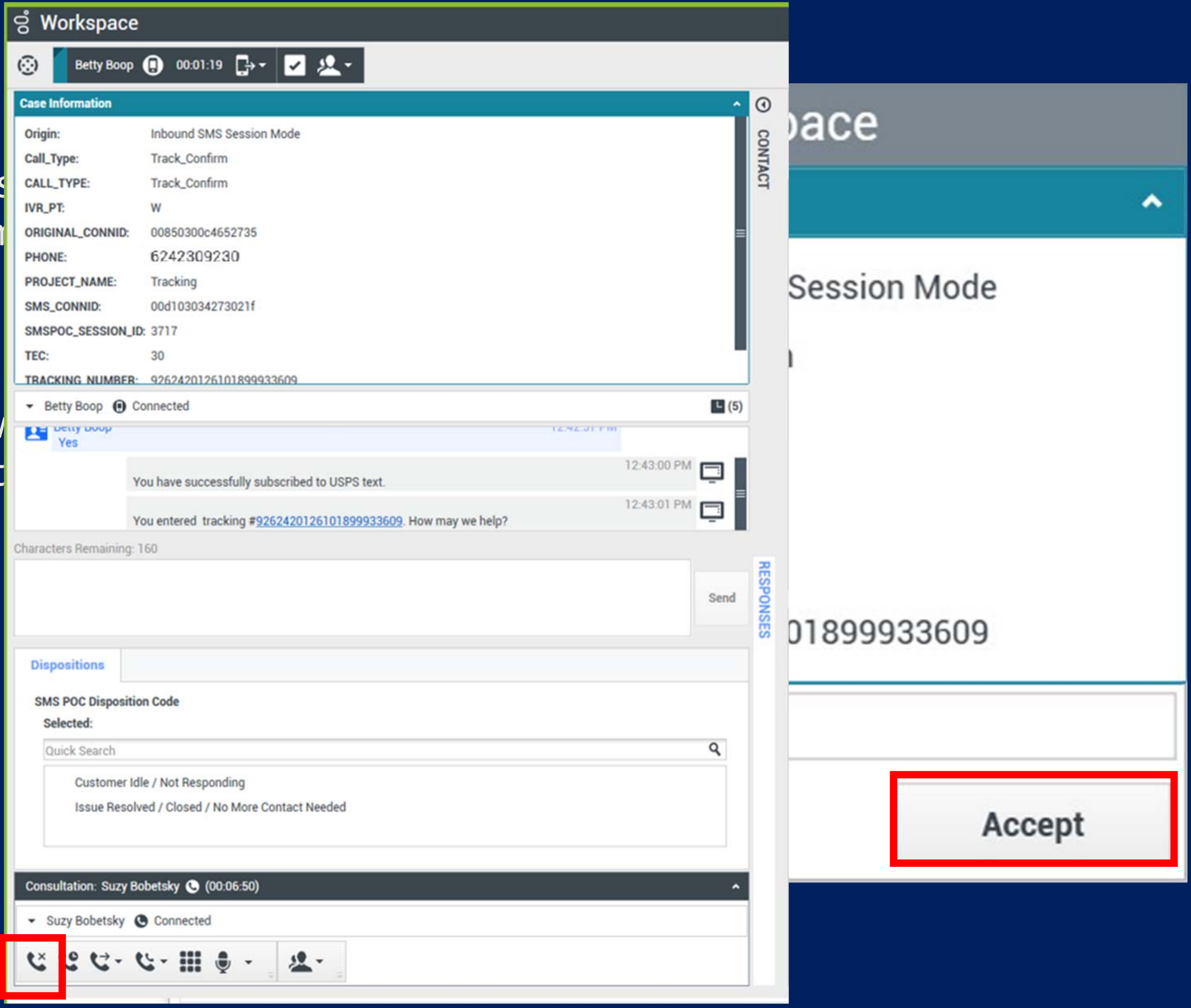
E-mail Address

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

Accepting SMS Interaction Escalations

WDE will make a “ring” s
to notify you of an incon
SMS interaction.

Click “Accept” on the lov
right side of the screen t
accept the interaction.



Workspace
Betty Boop
00:01:19
Case Information
CONTACT
Betty Boop
Connected
(5)
Send
RESPONSES
Dispositions
Consultation: Suzy Bobetsky
(00:06:50)
Suzy Bobetsky
Connected
pace
Session Mode
01899933609
Accept

Origin: Inbound SMS Session Mode
Call_Type: Track_Confirm
CALL_TYPE: Track_Confirm
IVR_PT: W
ORIGINAL_CONNID: 00850300c4652735
PHONE: 6242309230
PROJECT_NAME: Tracking
SMS_CONNID: 00d103034273021f
SMSPOC_SESSION_ID: 3717
TEC: 30
TRACKING_NUMBER: 9262420126101899933609

Betty Boop
Yes

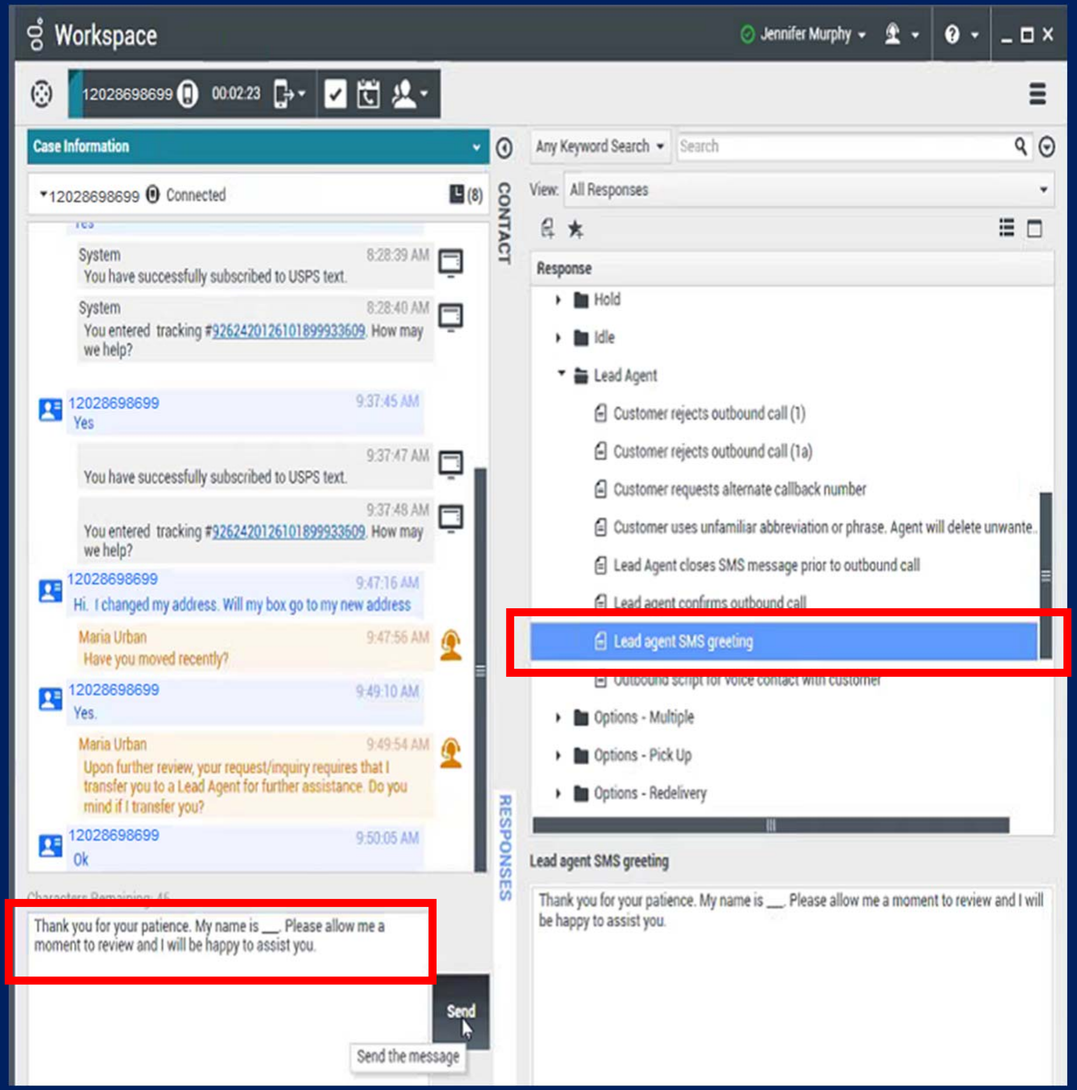
12:43:00 PM
You have successfully subscribed to USPS text.

12:43:01 PM
You entered tracking #9262420126101899933609. How may we help?

Characters Remaining: 160

SMS POC Disposition Code
Selected:
Quick Search
Customer Idle / Not Responding
Issue Resolved / Closed / No More Contact Needed

Handling SMS Interaction Escalations


Workspace
Jennifer Murphy
12028698699
00:02:23
Case Information
12028698699 Connected
(8)
CONTACT
RESPONSES
Any Keyword Search
Search
View: All Responses
Response
Hold
Idle
Lead Agent
Customer rejects outbound call (1)
Customer rejects outbound call (1a)
Customer requests alternate callback number
Customer uses unfamiliar abbreviation or phrase. Agent will delete unwante...
Lead Agent closes SMS message prior to outbound call
Lead agent confirms outbound call
Lead agent SMS greeting
Options - Multiple
Options - Pick Up
Options - Redelivery
Send
Send the message

System 8:28:39 AM
You have successfully subscribed to USPS text.

System 8:28:40 AM
You entered tracking #9262420126101899933609. How may we help?

12028698699 9:37:45 AM
Yes

9:37:47 AM
You have successfully subscribed to USPS text.

9:37:48 AM
You entered tracking #9262420126101899933609. How may we help?

12028698699 9:47:16 AM
Hi. I changed my address. Will my box go to my new address

Maria Urban 9:47:56 AM
Have you moved recently?

12028698699 9:49:10 AM
Yes.

Maria Urban 9:49:54 AM
Upon further review, your request/inquiry requires that I transfer you to a Lead Agent for further assistance. Do you mind if I transfer you?

12028698699 9:50:05 AM
Ok

Characters Remaining: 46

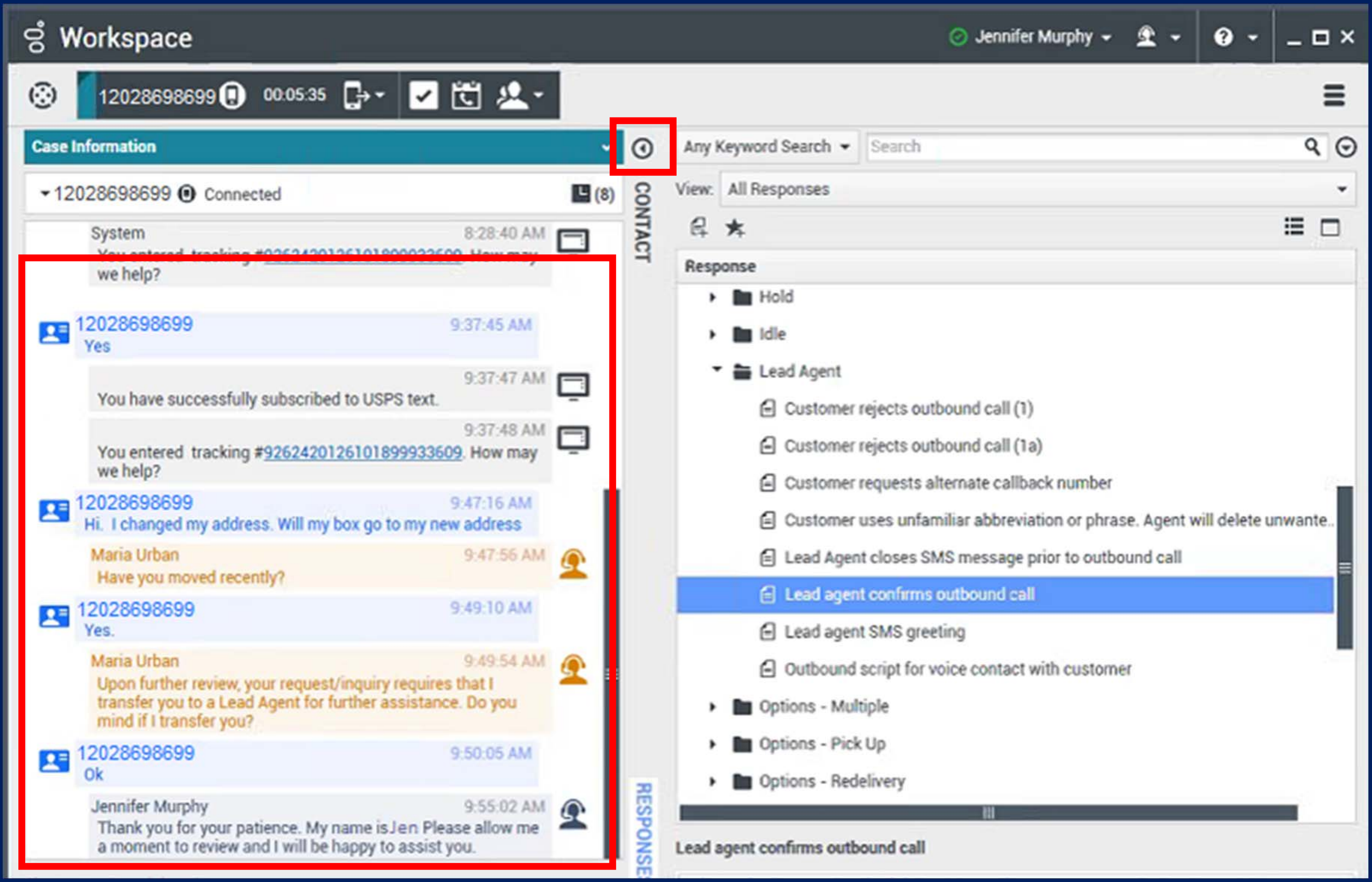
Thank you for your patience. My name is __. Please allow me a moment to review and I will be happy to assist you.

Lead agent SMS greeting

Thank you for your patience. My name is __. Please allow me a moment to review and I will be happy to assist you.

UNITED STATES POSTAL SERVICE

Review Chat History


Workspace
Jennifer Murphy
12028698699
00:05:35
Case Information
CONTACT
RESPONSES
Any Keyword Search
Search
View: All Responses
Response
Hold
Idle
Lead Agent
Customer rejects outbound call (1)
Customer rejects outbound call (1a)
Customer requests alternate callback number
Customer uses unfamiliar abbreviation or phrase. Agent will delete unwante...
Lead Agent closes SMS message prior to outbound call
Lead agent confirms outbound call
Lead agent SMS greeting
Outbound script for voice contact with customer
Options - Multiple
Options - Pick Up
Options - Redelivery
Lead agent confirms outbound call

12028698699 Connected (8)

System 8:28:40 AM
You entered tracking #[illegible]. How may we help?

12028698699 9:37:45 AM
Yes

9:37:47 AM
You have successfully subscribed to USPS text.

9:37:48 AM
You entered tracking #9262420126101899933609. How may we help?

12028698699 9:47:16 AM
Hi. I changed my address. Will my box go to my new address

Maria Urban 9:47:56 AM
Have you moved recently?

12028698699 9:49:10 AM
Yes.

Maria Urban 9:49:54 AM
Upon further review, your request/inquiry requires that I transfer you to a Lead Agent for further assistance. Do you mind if I transfer you?

12028698699 9:50:05 AM
Ok

Jennifer Murphy 9:55:02 AM
Thank you for your patience. My name isJen Please allow me a moment to review and I will be happy to assist you.

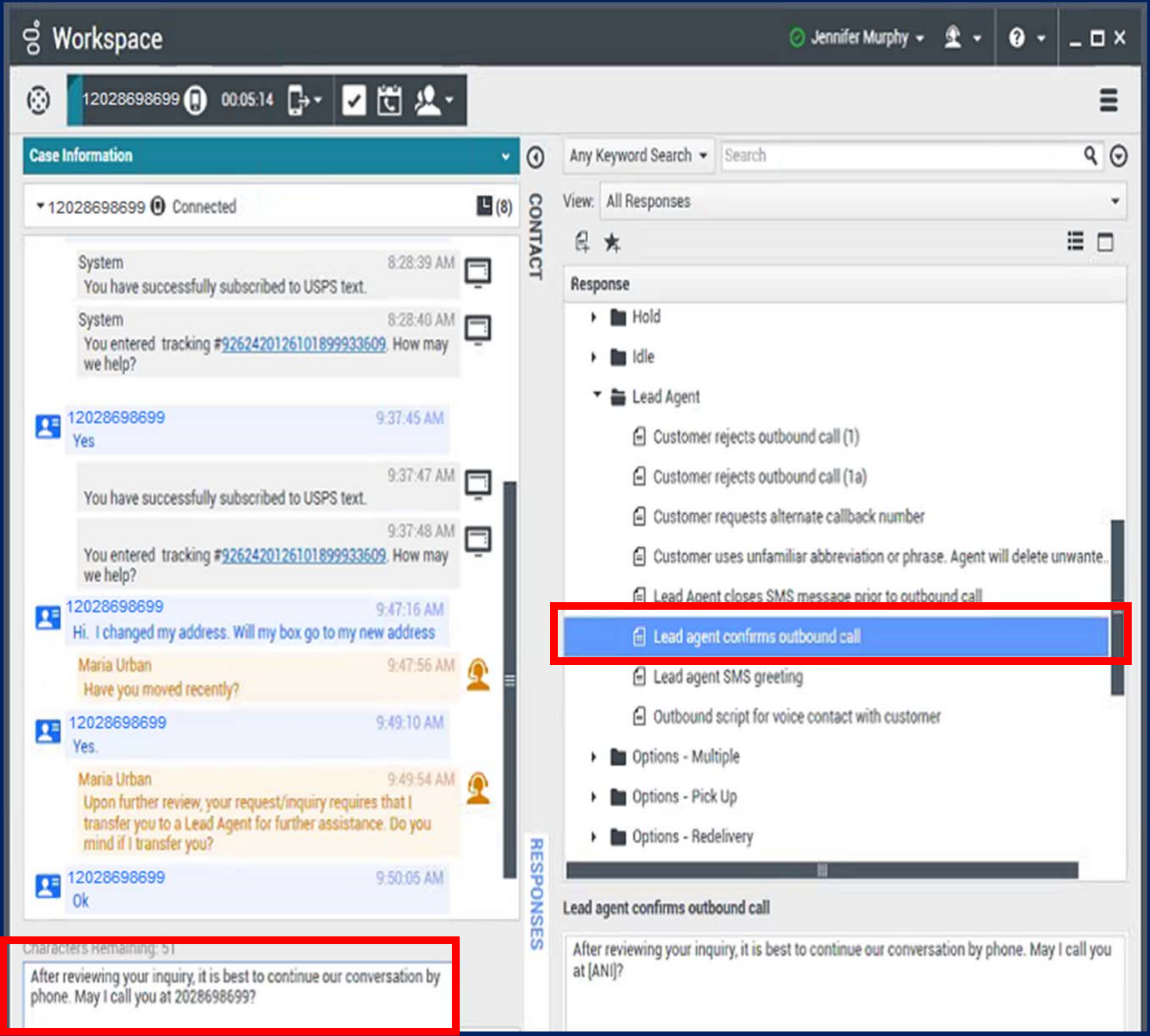
- Handling SMS Interaction Assist Calls
- Handling SMS Interaction Escalations
- Placing Outbound Calls
- Escalating to Supervisors
- Practice

Outbound Calls

When should I place an outbound call?

- Customer's question is outside of the applicable call types and event codes
- Standard responses do not address the customer's question/issue
- Customer requests to end SMS and speak via voice

Initiating Outbound Calls (1 of 3)


Workspace
Jennifer Murphy
12028698699
00:05:14
Case Information
12028698699 Connected
(8)
CONTACT
RESPONSES
Any Keyword Search
Search
View: All Responses
Response
Hold
Idle
Lead Agent
Customer rejects outbound call (1)
Customer rejects outbound call (1a)
Customer requests alternate callback number
Customer uses unfamiliar abbreviation or phrase. Agent will delete unwante...
Lead Agent closes SMS message prior to outbound call
Lead agent confirms outbound call
Lead agent SMS greeting
Outbound script for voice contact with customer
Options - Multiple
Options - Pick Up
Options - Redelivery
Characters Remaining: 51

System 8:28:39 AM
You have successfully subscribed to USPS text.

System 8:28:40 AM
You entered tracking #9262420126101899933609. How may we help?

12028698699 9:37:45 AM
Yes

9:37:47 AM
You have successfully subscribed to USPS text.

9:37:48 AM
You entered tracking #9262420126101899933609. How may we help?

12028698699 9:47:16 AM
Hi. I changed my address. Will my box go to my new address

Maria Urban 9:47:56 AM
Have you moved recently?

12028698699 9:49:10 AM
Yes.

Maria Urban 9:49:54 AM
Upon further review, your request/inquiry requires that I transfer you to a Lead Agent for further assistance. Do you mind if I transfer you?

12028698699 9:50:05 AM
Ok

After reviewing your inquiry, it is best to continue our conversation by phone. May I call you at 2028698699?

Lead agent confirms outbound call

After reviewing your inquiry, it is best to continue our conversation by phone. May I call you at [ANI]?

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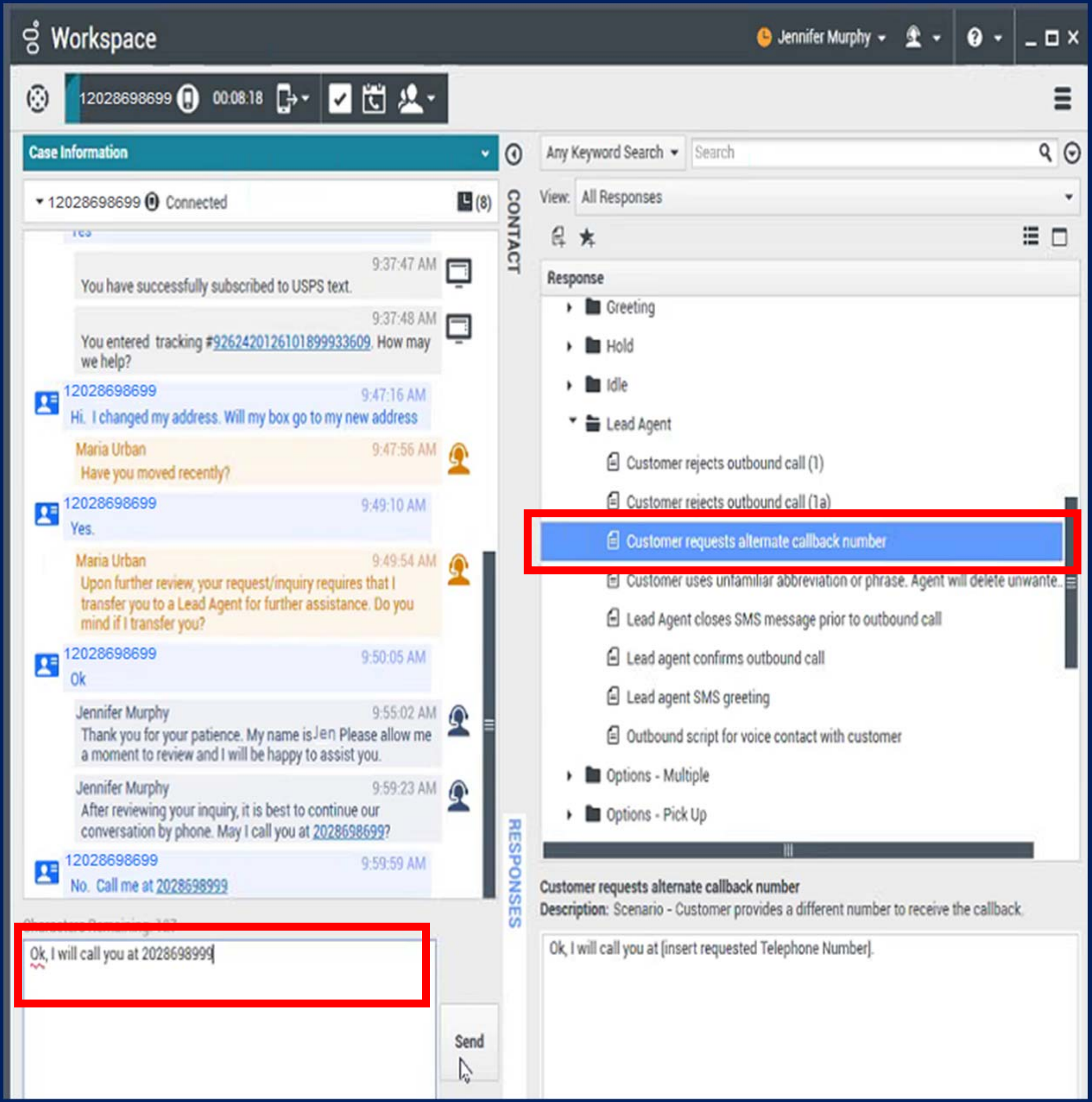
Initiating Outbound Calls (2 of 3)


Workspace
Jennifer Murphy
12028698699
00:08:18
Case Information
12028698699 Connected
(8)
CONTACT
RESPONSES
Any Keyword Search
Search
View: All Responses
Response
Greeting
Hold
Idle
Lead Agent
Customer rejects outbound call (1)
Customer rejects outbound call (1a)
Customer requests alternate callback number
Customer uses unfamiliar abbreviation or phrase. Agent will delete unwante...
Lead Agent closes SMS message prior to outbound call
Lead agent confirms outbound call
Lead agent SMS greeting
Outbound script for voice contact with customer
Options - Multiple
Options - Pick Up
Send

9:37:47 AM
You have successfully subscribed to USPS text.

9:37:48 AM
You entered tracking #9262420126101899933609. How may we help?

12028698699 9:47:16 AM
Hi. I changed my address. Will my box go to my new address

Maria Urban 9:47:56 AM
Have you moved recently?

12028698699 9:49:10 AM
Yes.

Maria Urban 9:49:54 AM
Upon further review, your request/inquiry requires that I transfer you to a Lead Agent for further assistance. Do you mind if I transfer you?

12028698699 9:50:05 AM
Ok

Jennifer Murphy 9:55:02 AM
Thank you for your patience. My name is Jen Please allow me a moment to review and I will be happy to assist you.

Jennifer Murphy 9:59:23 AM
After reviewing your inquiry, it is best to continue our conversation by phone. May I call you at 2028698699?

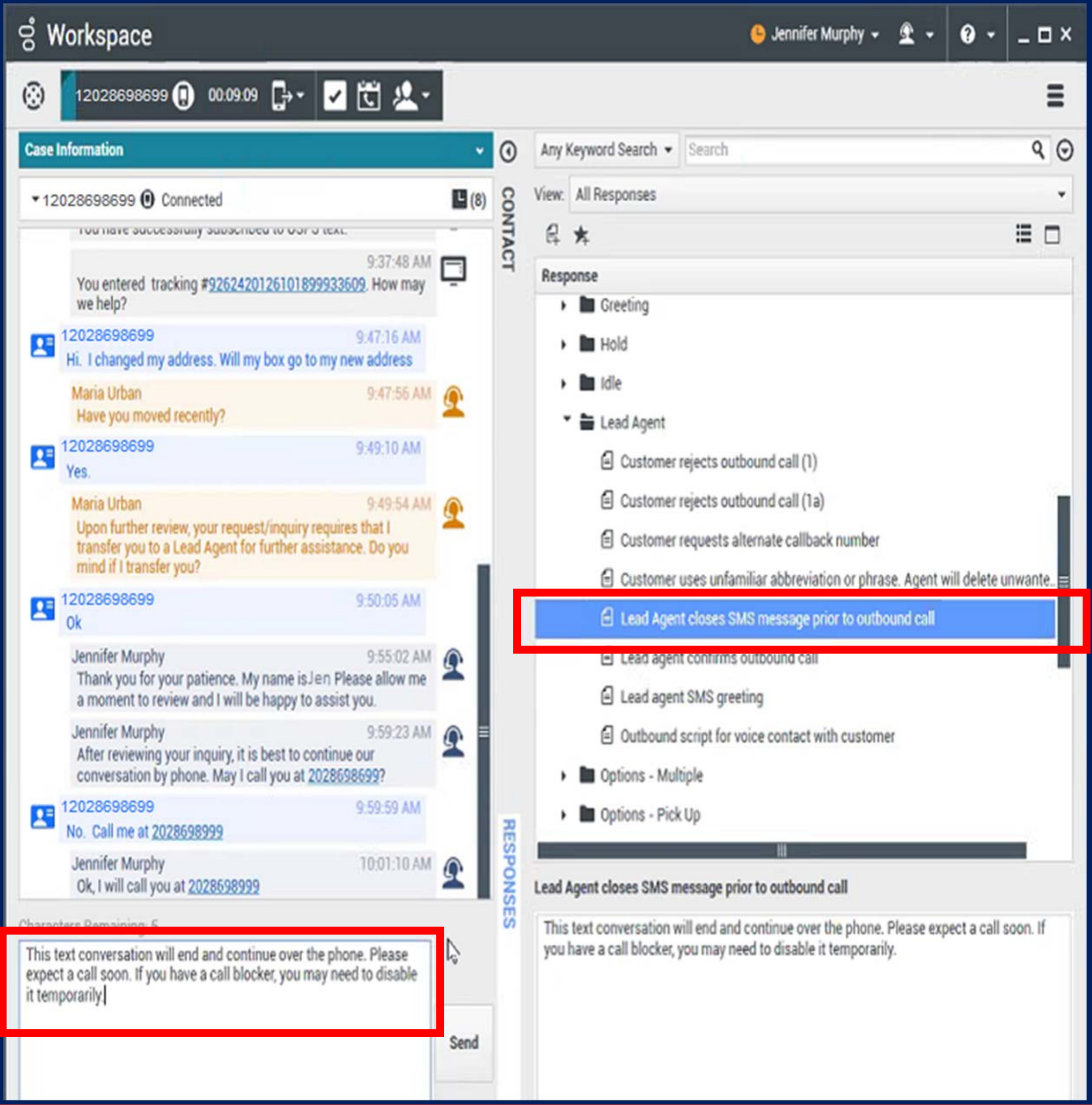
12028698699 9:59:59 AM
No. Call me at 2028698999

Ok, I will call you at 2028698999

Customer requests alternate callback number
Description: Scenario - Customer provides a different number to receive the callback.

Ok, I will call you at [insert requested Telephone Number].

Initiating Outbound Calls (3 of 3)


Workspace
Jennifer Murphy
12028698699
00:09:09
Case Information
12028698699 Connected
(8)
CONTACT
RESPONSES
Any Keyword Search
Search
View: All Responses
Response
Greeting
Hold
Idle
Lead Agent
Customer rejects outbound call (1)
Customer rejects outbound call (1a)
Customer requests alternate callback number
Customer uses unfamiliar abbreviation or phrase. Agent will delete unwante...
Lead Agent closes SMS message prior to outbound call
Lead agent confirms outbound call
Lead agent SMS greeting
Outbound script for voice contact with customer
Options - Multiple
Options - Pick Up
Characters Remaining: 5
Send

You have successfully subscribed to USPS text.

9:37:48 AM
You entered tracking #9262420126101899933609. How may we help?

12028698699 9:47:16 AM
Hi. I changed my address. Will my box go to my new address

Maria Urban 9:47:56 AM
Have you moved recently?

12028698699 9:49:10 AM
Yes.

Maria Urban 9:49:54 AM
Upon further review, your request/inquiry requires that I transfer you to a Lead Agent for further assistance. Do you mind if I transfer you?

12028698699 9:50:05 AM
Ok

Jennifer Murphy 9:55:02 AM
Thank you for your patience. My name isJen Please allow me a moment to review and I will be happy to assist you.

Jennifer Murphy 9:59:23 AM
After reviewing your inquiry, it is best to continue our conversation by phone. May I call you at 2028698699?

12028698699 9:59:59 AM
No. Call me at 2028698999

Jennifer Murphy 10:01:10 AM
Ok, I will call you at 2028698999

This text conversation will end and continue over the phone. Please expect a call soon. If you have a call blocker, you may need to disable it temporarily.

Lead Agent closes SMS message prior to outbound call

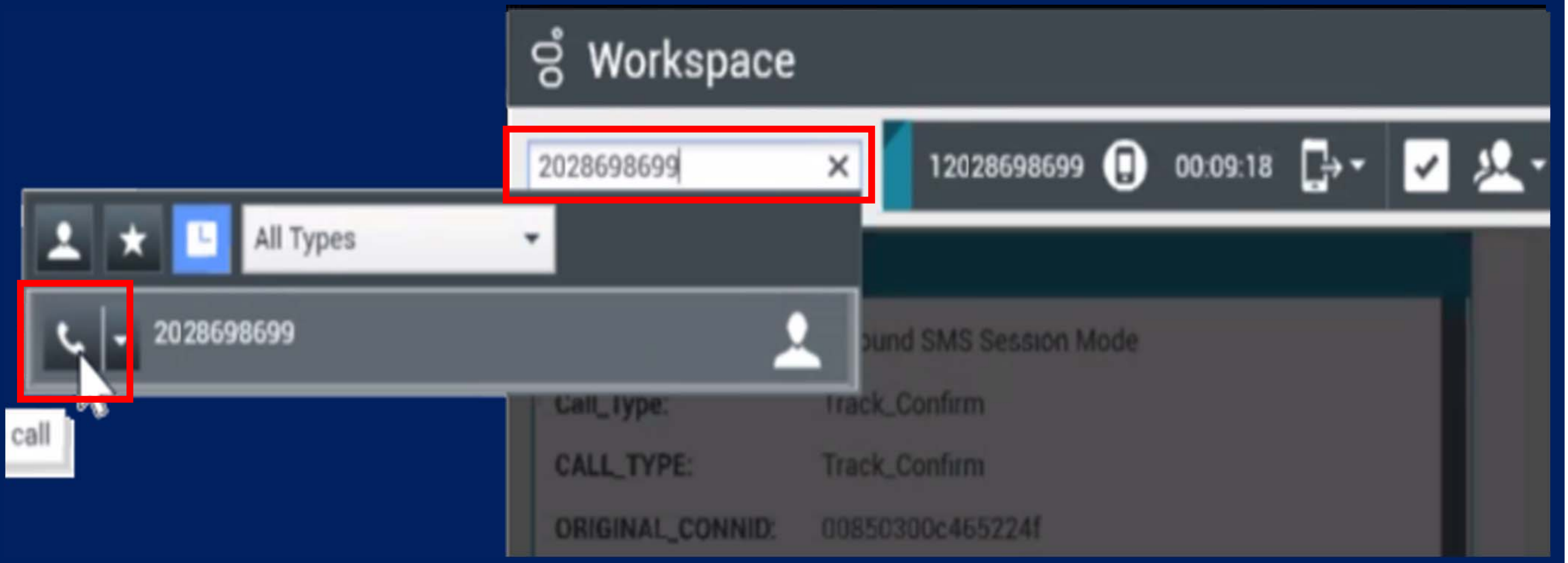
This text conversation will end and continue over the phone. Please expect a call soon. If you have a call blocker, you may need to disable it temporarily.

Placing Outbound Calls

1. Click the Team Communicator (pie) button.

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

3. Click the Start Call button.



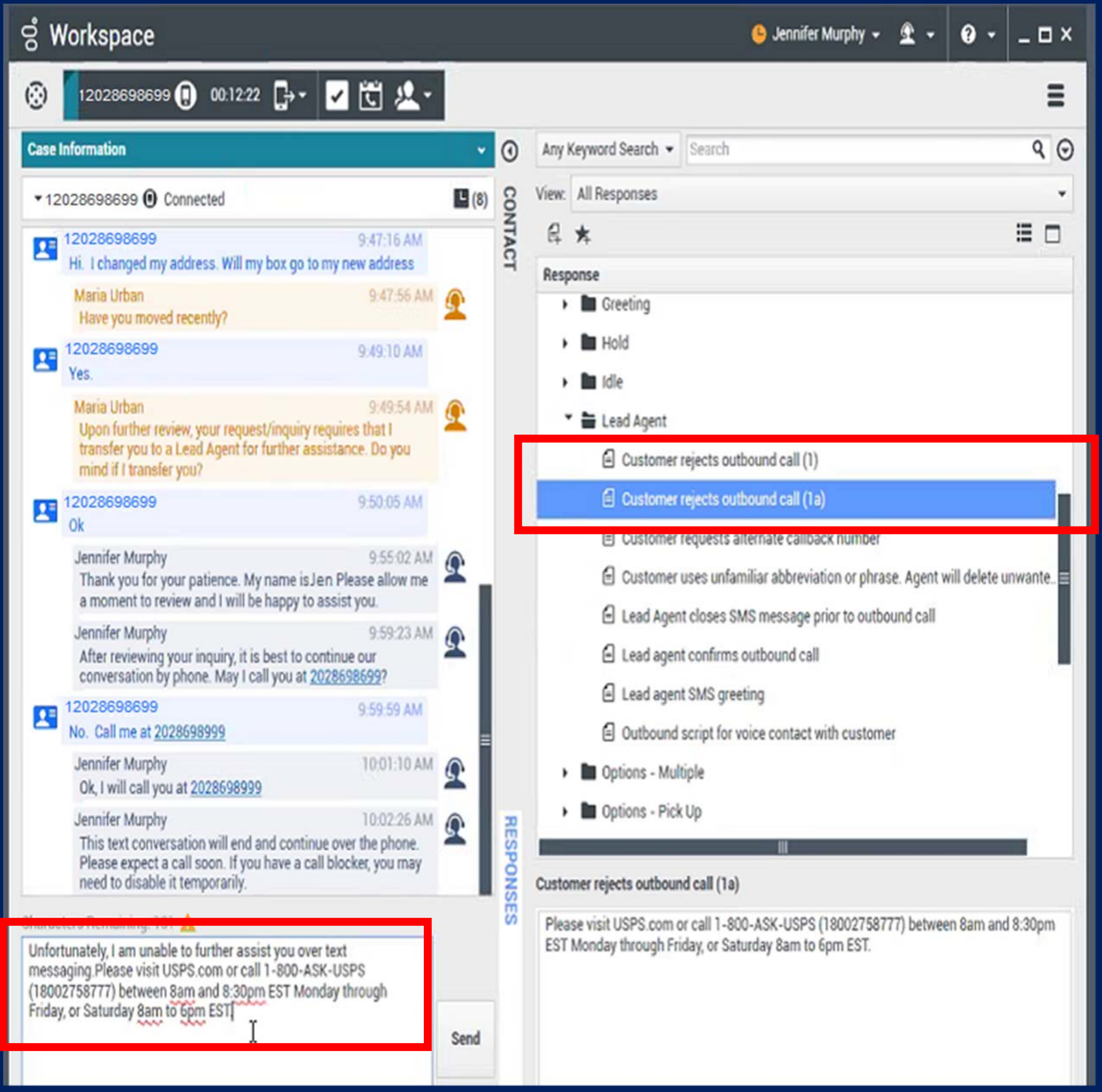
Workspace
2028698699
12028698699
00:09:18
All Types
2028698699
call
ound SMS Session Mode

Call_Type: Track_Confirm

CALL_TYPE: Track_Confirm

ORIGINAL_CONNID: 00850300c465224f

Declined Outbound Calls


Workspace
Jennifer Murphy
12028698699 00:12:22
Case Information
12028698699 Connected (8)
CONTACT
RESPONSES
Any Keyword Search
Search
View: All Responses
Response
Greeting
Hold
Idle
Lead Agent
Customer rejects outbound call (1)
Customer rejects outbound call (1a)
Customer requests alternate callback number
Customer uses unfamiliar abbreviation or phrase. Agent will delete unwante...
Lead Agent closes SMS message prior to outbound call
Lead agent confirms outbound call
Lead agent SMS greeting
Outbound script for voice contact with customer
Options - Multiple
Options - Pick Up
Send

12028698699 9:47:16 AM
Hi. I changed my address. Will my box go to my new address

Maria Urban 9:47:56 AM
Have you moved recently?

12028698699 9:49:10 AM
Yes.

Maria Urban 9:49:54 AM
Upon further review, your request/inquiry requires that I transfer you to a Lead Agent for further assistance. Do you mind if I transfer you?

12028698699 9:50:05 AM
Ok

Jennifer Murphy 9:55:02 AM
Thank you for your patience. My name isJen Please allow me a moment to review and I will be happy to assist you.

Jennifer Murphy 9:59:23 AM
After reviewing your inquiry, it is best to continue our conversation by phone. May I call you at 2028698699?

12028698699 9:59:59 AM
No. Call me at 2028698999

Jennifer Murphy 10:01:10 AM
Ok, I will call you at 2028698999

Jennifer Murphy 10:02:26 AM
This text conversation will end and continue over the phone. Please expect a call soon. If you have a call blocker, you may need to disable it temporarily.

Unfortunately, I am unable to further assist you over text messaging.Please visit USPS.com or call 1-800-ASK-USPS (18002758777) between 8am and 8:30pm EST Monday through Friday, or Saturday 8am to 6pm EST

Customer rejects outbound call (1a)

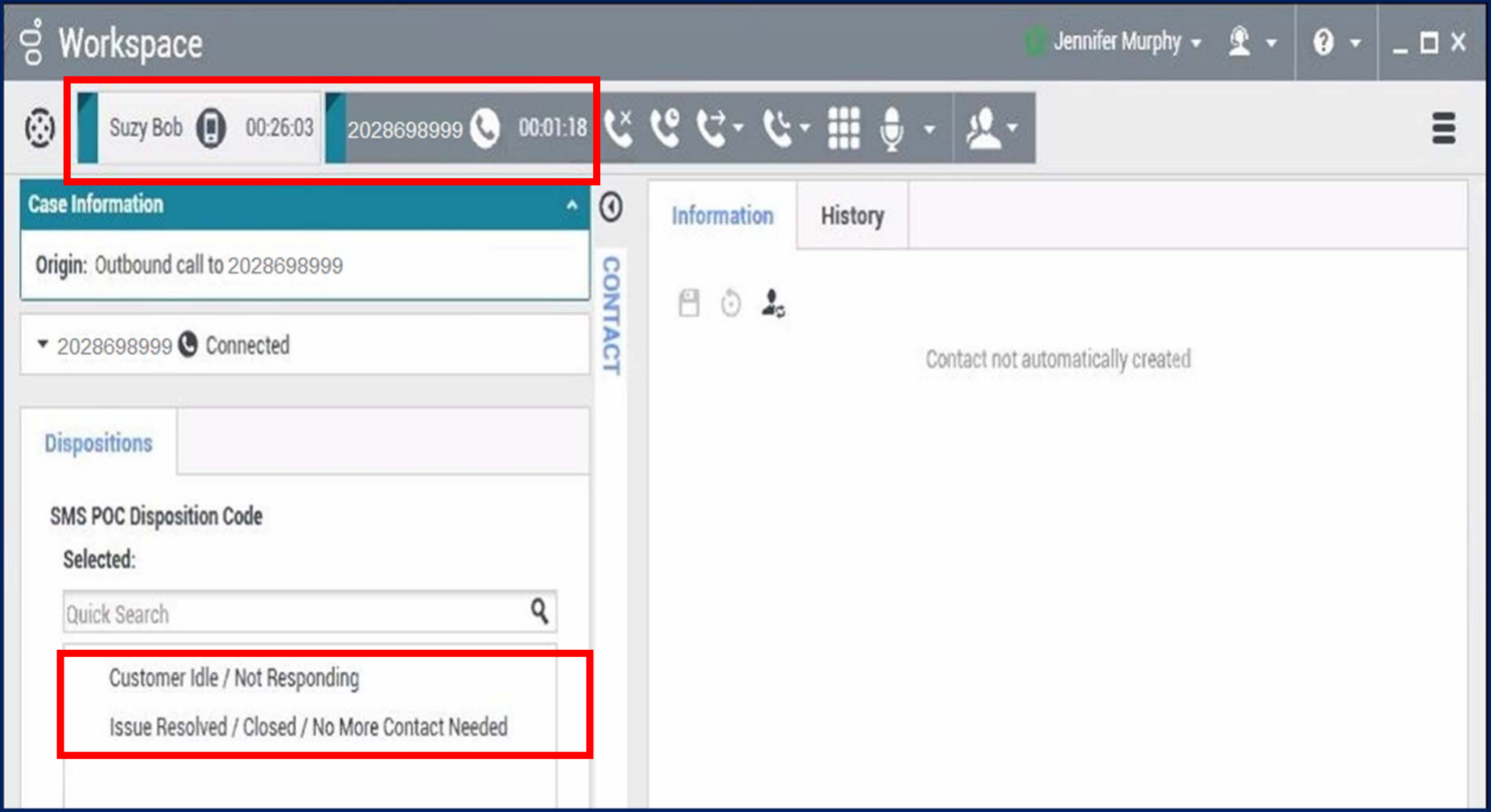
Please visit USPS.com or call 1-800-ASK-USPS (18002758777) between 8am and 8:30pm EST Monday through Friday, or Saturday 8am to 6pm EST.

Outbound Calls: Opening Script

Good (morning, afternoon, evening). My name is [Agent Name], a lead agent with the United States Postal Service.

I am following up on our recent text interaction.

Dispositioning Outbound Calls (WDE)


Workspace
Jennifer Murphy
Suzy Bob 00:26:03
2028698999 00:01:18
Case Information
Information
History
CONTACT
Dispositions
Quick Search

Origin: Outbound call to 2028698999

2028698999 Connected

SMS POC Disposition Code

Selected:

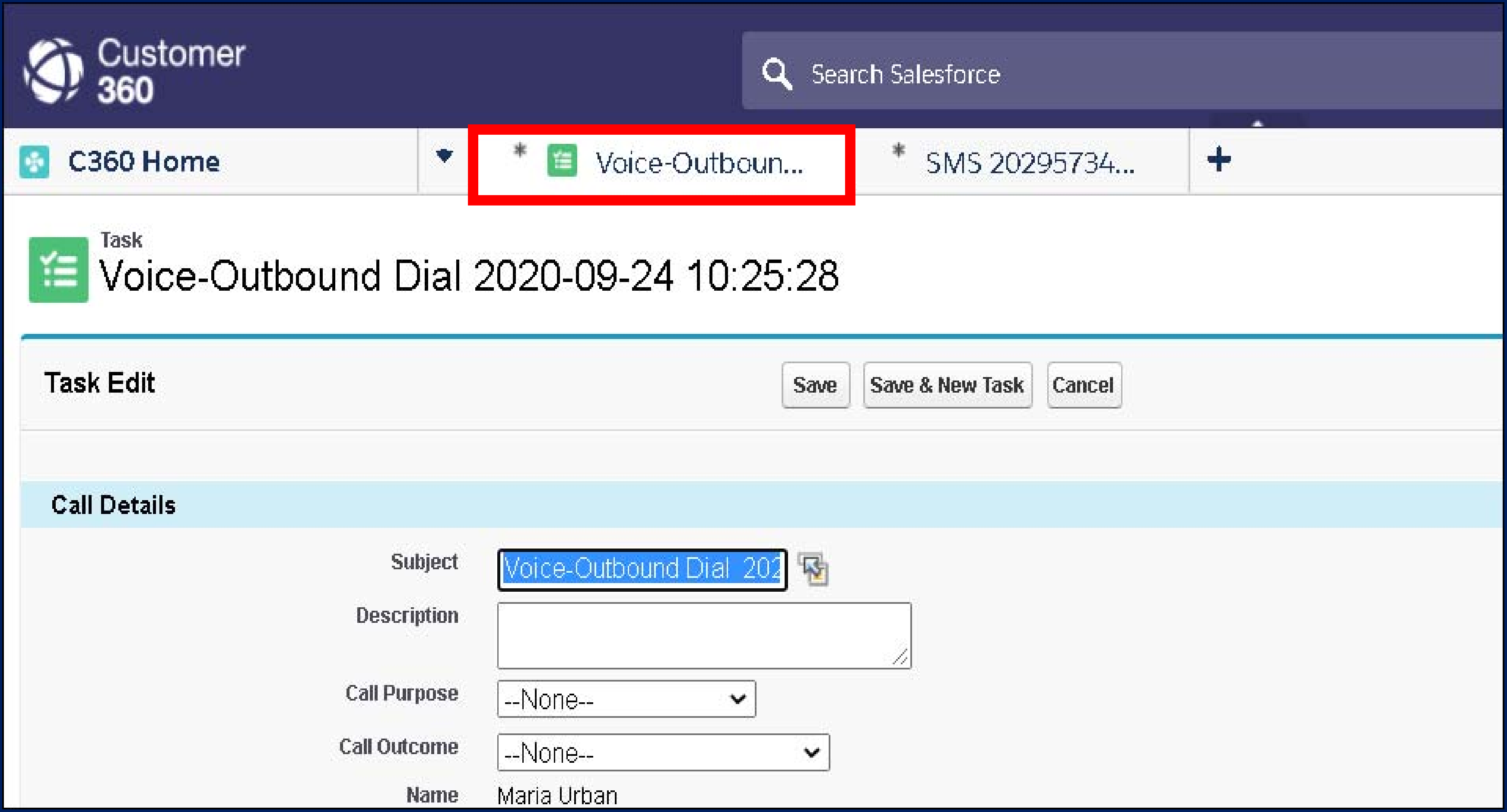
Customer Idle / Not Responding

Issue Resolved / Closed / No More Contact Needed

Contact not automatically created

Do not disposition the SMS interaction until AFTER you complete the outbound call to the customer.

Dispositioning Outbound Calls (C360)


Customer 360
Search Salesforce
C360 Home
Voice-Outboun...
SMS 20295734...
Task
Save
Save & New Task
Cancel

Voice-Outbound Dial 2020-09-24 10:25:28

Task Edit

Call Details

Subject: Voice-Outbound Dial 202

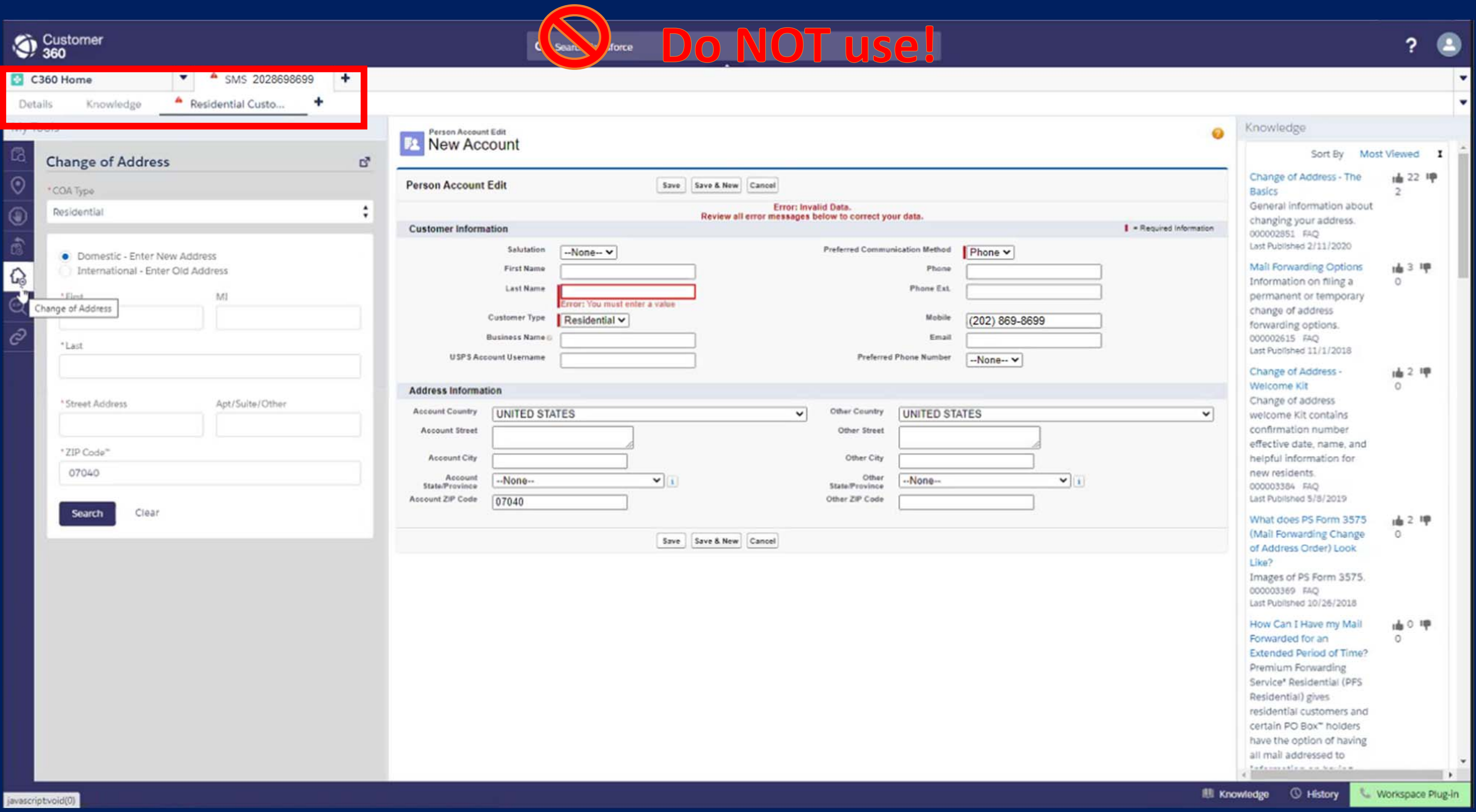
Description:

Call Purpose: --None--

Call Outcome: --None--

Name: Maria Urban

C360 SMS Interaction Reminders



Do NOT use!

Customer 360
Search Salesforce
C360 Home
SMS 2028698699
Details
Knowledge
Residential Custo...
Change of Address
Knowledge
Workspace Plug-in
History
javascript:void(0)

Change of Address

COA Type: Residential

● Domestic - Enter New Address
○ International - Enter Old Address

First
MI
Last
Street Address
Apt/Suite/Other
ZIP Code: 07040

Search
Clear

Person Account Edit
New Account

Person Account Edit

Save
Save & New
Cancel

Error: Invalid Data.
Review all error messages below to correct your data.

Customer Information

= Required Information

Salutation: --None--
First Name:
Last Name:
Error: You must enter a value
Customer Type: Residential
Business Name:
USPS Account Username:
Preferred Communication Method: Phone
Phone:
Phone Ext.
Mobile: (202) 869-8699
Email:
Preferred Phone Number: --None--

Address Information

Account Country: UNITED STATES
Account Street:
Account City:
Account State/Province: --None--
Account ZIP Code: 07040
Other Country: UNITED STATES
Other Street:
Other City:
Other State/Province: --None--
Other ZIP Code:

Save
Save & New
Cancel

Knowledge

Sort By: Most Viewed

Change of Address - The Basics
General information about changing your address.
000002851 FAQ
Last Published 2/11/2020
22 2

Mail Forwarding Options
Information on filing a permanent or temporary change of address forwarding options.
000002615 FAQ
Last Published 11/1/2018
3 0

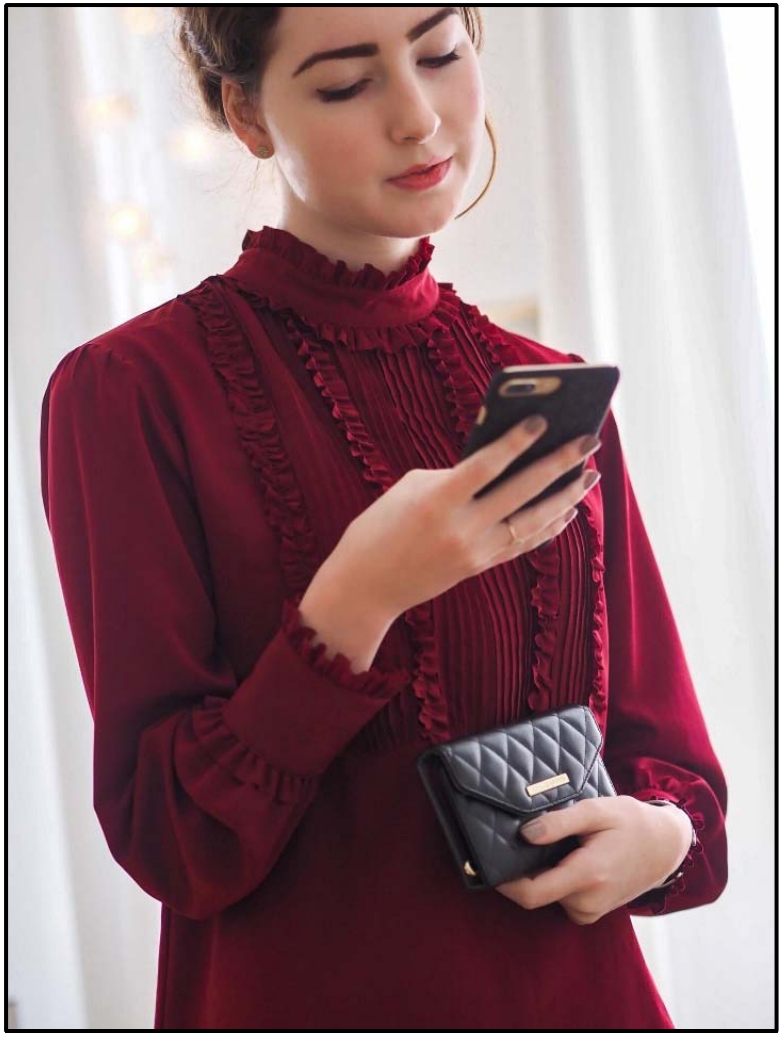
Change of Address - Welcome Kit
Change of address welcome Kit contains confirmation number effective date, name, and helpful information for new residents.
000003384 FAQ
Last Published 5/8/2019
2 0

What does PS Form 3575 (Mail Forwarding Change of Address Order) Look Like?
Images of PS Form 3575.
000003369 FAQ
Last Published 10/26/2018
2 0

How Can I Have my Mail Forwarded for an Extended Period of Time?
Premium Forwarding Service® Residential (PFS Residential) gives residential customers and certain PO Box™ holders have the option of having all mail addressed to
0 0

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

Escalating SMS Interactions to Supervisors



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

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Knowledge Check: Add a Stamp! (1 of 3)

Activity

What is your first action after accepting an SMS escalation?

- Place an outbound call to the customer.
- Review the chat history.
- [✓ Send the Lead Agent greeting standard response.]
- Disconnect the initial Agent.

Knowledge Check: Add a Stamp! (2 of 3)

Activity

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

SMS interaction has lasted more than 10 minutes.

The customer is idle.

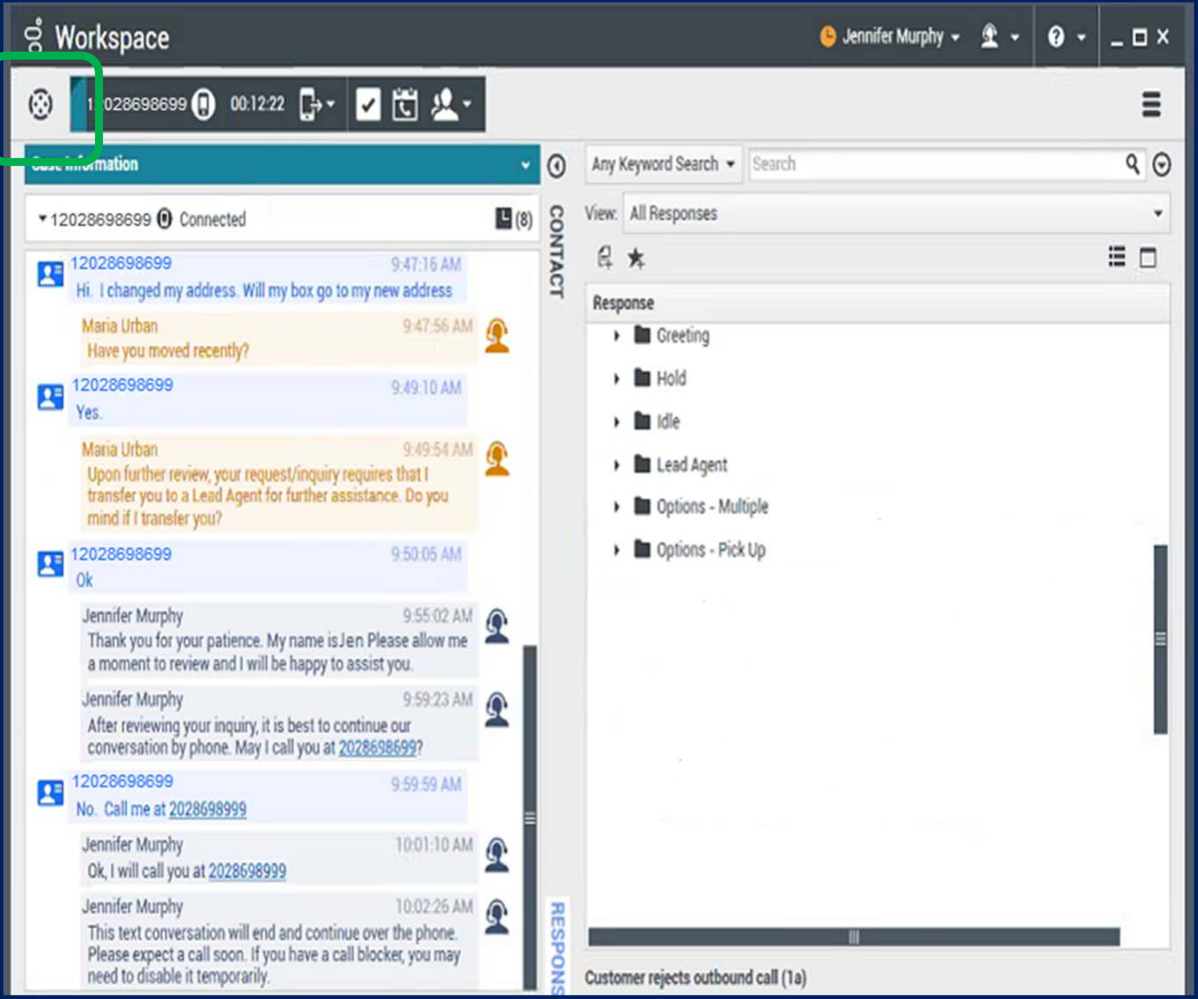
A Service Request is needed.

Customer requests to continue via phone.

Knowledge Check: Add a Stamp! (3 of 3)

Activity

Where do you click to initiate an outbound call?


Workspace
Jennifer Murphy
1 028698699
00:12:22
Case ...rmation
CONTACT
Any Keyword Search
Search
View:
All Responses
Response
Greeting
Hold
Idle
Lead Agent
Options - Multiple
Options - Pick Up
RESPONS

12028698699 Connected (8)

12028698699 9:47:16 AM
Hi. I changed my address. Will my box go to my new address

Maria Urban 9:47:56 AM
Have you moved recently?

12028698699 9:49:10 AM
Yes.

Maria Urban 9:49:54 AM
Upon further review, your request/inquiry requires that I transfer you to a Lead Agent for further assistance. Do you mind if I transfer you?

12028698699 9:50:05 AM
Ok

Jennifer Murphy 9:55:02 AM
Thank you for your patience. My name is Jen Please allow me a moment to review and I will be happy to assist you.

Jennifer Murphy 9:59:23 AM
After reviewing your inquiry, it is best to continue our conversation by phone. May I call you at 2028698699?

12028698699 9:59:59 AM
No. Call me at 2028698999

Jennifer Murphy 10:01:10 AM
Ok, I will call you at 2028698999

Jennifer Murphy 10:02:26 AM
This text conversation will end and continue over the phone. Please expect a call soon. If you have a call blocker, you may need to disable it temporarily.

Customer rejects outbound call (1a)

Questions?

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

Demo

Demo

Practice