

American Postal Workers Union, AFL-CIO

Memorandum

May 3, 2002

10 Melrose Avenue
Suite 210
Cherry Hill, NJ 08003



Telephone
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From the Office of JIM BURKE
Coordinator
Eastern Region

TO: Philadelphia District Locals, National Business Agents

SUBJECT: GIST Program Information

Attached for your information is correspondence from USPS Labor Relations clarifying the GIST Program vs Mystery Shopper.

Jim Burke
Eastern Region Coordinator

JB/ca
Enclosure

cc: Bensalem Local
Langhorne Area Local
Philadelphia Area Local
Philadelphia BMC Local
Tri County Area Local
Upper Darby Local
Mike Gallagher, NBA
Jeff Kehlert, NBA
Eric Wilson, NBA ✓

HUMAN RESOURCES
EASTERN AREA OFFICE



April 25, 2002

Jim Burke
Coordinator, Eastern Region APWU
10 Melrose Avenue (Suite 210)
Cherry Hill, NJ 08003-3647

Dear Jim:

RE: Correspondence to Mr. McCurdy Dated March 28, 2002, Concerning
Wynnewood, PA General Order 02-02.

The referenced correspondence was forwarded for my investigation and response. The referenced general order is not an "offshoot of the Mystery Shopper Program." This order does reference the "GIST" program that was jointly signed off on October 7, 1999, by Mr. Guffy of the APWU and Ms. Laitch for Postal Service Headquarters. The GIST program had been in existence for some time prior to the Mystery Shopper Program. As clearly stated in the October 7, 1999, document, "GIST is a program that promotes improving the customer experience for every transaction" and the "Mystery Shopper represents the customer's experience at the time of the shop."

The order promulgated by Mr. Casey re-iterates the GIST principles and requires that they are followed when waiting on customers. It is intended to clearly identify to the window clerks what is expected. The term "corrective action" utilized in the last sentence does not equate to automatic discipline. As the result of subsequent discussions with Harvey White, Mgr. Human Resources, a re-issuance or addendum to the general order will be mandated by the Philadelphia District. Please get back to me should you have any subsequent questions or concerns.

Sincerely,

A handwritten signature in cursive script that reads "Stephen Malizia".

Stephen C. Malizia
Manager, Labor Relations
Eastern Area

cc: G. McCurdy
W. Eggiman
H. White

5315 CAMPBELLS RUN ROAD
PITTSBURGH PA 15277-7050
412-494-2515
FAX: 412-494-2512



January 14, 2000

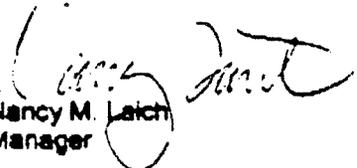
AREA RETAIL MANAGERS
DISTRICT RETAIL MANAGERS

SUBJECT: Joint GIST Memo

Enclosed is a memo jointly signed by me and Cliff Guffey, the Clerk Craft director of the APWU. Cliff reports directly to Moe Biler. Cliff has expressed to me, repeatedly, his concerns about some of the negative perceptions clerks have about the Mystery Shopper program. We agreed that some clarification about expectations is in order.

We agreed that expecting clerks to follow a specific script, word for word, with every customer is not desirable, especially to customers. We are not trying to force our clerks to become robots. We also agreed with the principles established with the GIST program and that if clerks follow these principles with every customer, every time, they will also meet the expectations of the Mystery Shopper program. Clerks do need to understand, however, that asking a customer, "Can I help you?" does not satisfy the inquire part of GIST.

The APWU has already distributed this memo. It is also included in the course materials for the new Sales and Services Training program for new clerks. Please distribute this memo to existing clerks and supervisors as you see fit. Thank you.


Nancy M. Leitch
Manager

Enclosure



October 7, 1999

SUBJECT: MYSTERY SHOPPER - FOCUS ON GIST

Our retail customers have more choices today than they've had in the past. They have choices among the products and services we offer and they have choices about who provides them. Making sure each customer leaves the retail counter satisfied with their purchase and experience is our focus.

There has been confusion in the past regarding Mystery Shopper Program and whether it establishes new requirements that are at opposition with GIST (Greet-Inquire-Suggest-Thank). The two programs support each other in our goal to improve the customer experience.

The Mystery Shopper Program provides information on our retail performance from a customer's perspective. All large retailers conduct some sort of mystery shop to help identify areas for improvement and ensure customer satisfaction.

What we require of employees when the customer is a mystery shopper is what is expected of them with every customer. It can be summarized within our GIST principles.

GIST Element

MYSTERY SHOPPER Element

Greet

Did the employee greet you pleasantly as soon as you reached the counter?

Did the employee smile and make eye contact?

Inquire

Did the employee ask how soon you wanted the item to get to its destination?

Suggest

Did the employee offer a specific class of mail?

Did the employee explain the features of the recommended class of mail?

Did the employee offer any special services?

Did the employee inform you that the USPS accepts credit and debit cards?

Did the employee suggest an additional item to purchase?

Thank

Did the employee thank you at the end of the transaction?

Clearly, when a customer comes in to purchase only a single stamp, the employee will not need to ask all questions listed above. However, if employees keep GIST principles in mind during every transaction, employees will ask appropriate questions during each transaction where it is applicable.

Any future changes to the mystery shopper question requirements will be consistent with GIST principles.

The Mystery Shopper represents the customer's experience at the time of the shop. GIST is a program that promotes improving the customer experience for every transaction. Mystery Shopper feedback can be a powerful tool for improving customer service as well as increasing revenue.



Nancy M. Laich
Manager
Retail Workforce Strategies



C.J. "Cliff" Guffy
Director, Clerk Division
American Postal Workers
Union, AFL-CIO

American Postal Workers Union, AFL-CIO

Memorandum

1300 L Street, NW
Washington, DC 20005

Telephone
(202) 842-4230

From the Office of THOMAS "TOMMY" THOMPSON
T.L.T. Assistant Director, Clerk Division

July 15, 1997

TO: Regional Coordinators &
National Business Agents, Clerk Division

RE: Mystery Shopper

When we discussed the issuance of Patricia Gilbert's letter we sought to have the letter expunge any grievance in the system. However, Labor Relations would not take that position and left us with the other alternative I have addressed in the Home Page, Clerk Craft News Updates that is to present those letters at any step of the grievance procedure including arbitration for possible resolution. Attached are the letters in question.

TLT:sec
opeiu #2
afl-cio

Attachments

June 30, 1997

VICE PRESIDENTS, AREA OPERATIONS

SUBJECT: Mystery Shopper

This memorandum is a reminder concerning the proper use of the Mystery Shopper surveys. It has come to our attention that results from the surveys may have been incorrectly used in some instances to discipline individual clerks.

The Mystery Shopper program's purpose and intent is as a corrective, not punitive, diagnostic tool to correct conditions that are detrimental to customer satisfaction. The survey does not, and should not, identify individuals, and must not be used as the source for disciplinary action.

When this tool was discussed with the APWU, we advised them it was not our intent to use it as a basis for issuing disciplinary actions. Rather, we have introduced it as a feedback tool on a unit's performance as seen by the customer.

I would appreciate your communicating this policy regarding Mystery Shopper to Districts within your Area.

Patricia M. Gibert

Patricia M. Gibert

cc: J. Mahon



July 11, 1997

LABOR RELATIONS SPECIALISTS, ALL AREAS

SUBJECT: Mystery Shopper

Attached is a memorandum from Patricia Gibert, Vice President Retail, addressed to Vice Presidents, Area Operations relative to the Mystery Shopper Program.

The intent of the letter is self-explanatory, however, emphasis is added relative to recent indications that the Mystery Shopper Program is allegedly being used as a tool for employee discipline.

The APWU was advised at the National level that the Mystery Shopper Program would be used as a feedback tool to monitor customer satisfaction. Negative information gathered from the Mystery Shopper survey should not be used as the basis for taking disciplinary action against an employee.

Share this information with appropriate managers as you deem necessary.

If you require additional information on this issue, you may contact Barbara L. Phipps of my staff at (202) 268-3834.

A handwritten signature in black ink, appearing to read "Peter A. Sgro".

Peter A. Sgro
Acting Manager
Contract Administration APWU/NPMHU

Attachment



October 5, 1998

Mr. Jim Burke
APWU - Eastern Region Coordinator
10 Melrose Ave. Ste. 210
Cherry Hill NJ 08003-3696

SUBJECT: Allegheny Area Mystery Shopper Policy

Dear Jim:

Mystery Shopper is a National program, where we have hired an independent contractor to observe and report on our Retail lobbies and the efficiency of our Window clerks. Many large retailers use the mystery shopper program to measure customer satisfaction and ease of use.

The sole purpose of this program is to provide the management a snap shot of how our Retail customers are being served at our facilities. This information is used to improve our services, extend lobby hours and update our facilities. As we become a more customer friendly retailer, mystery shopper can assist us in listening to the voice of the customer.

I agree with you that the survey results should not be used to discipline our window clerks. Allegheny Area policy is to use the mystery shopper scores as an indicator of the performance of our retail outlets and NOT to issue discipline.

The survey, Mr. Young, A/Postmaster, Wilmington DE, was talking about is the personal observation that his supervisors are conducting. This observation is being conducted to assure that the window clerks are performing to what is expected of them.

Sincerely,

A handwritten signature in black ink, appearing to read "Patrick R. Donahoe".

Patrick R. Donahoe
Vice President, Area Operations
Allegheny Area

cc: Wayne D. Rogers, Manager, Marketing, Allegheny Area
Elwood A. Mosley, District Manager, South Jersey District