

# Sales Meeting

September 23, 2011 12:00 noon  
Held at NAPS Headquarters

## Attendees:

USPS: Mr. Rucker Rucker, Vice President, Sales  
John Cavallo, Manager, Labor Relations, Policy Administration

NAPS: Louis Atkins, President  
Jay Killackey, Executive Vice President  
Ben Clapp, Executive Board Chairman  
Mary Burkhard, President, Br 244, NAPS

President Atkins thanked Mr. Rucker for agreeing to participate in a meeting on Sales with NAPS. We moved into the prepared agenda that was provided to the Postal Service in advance of the meeting:

## Agenda Item 1:

On August 4, 2011, NAPS sent a proposal to the Postmaster General that, if implemented, would transfer the current Sales group from a headquarters reporting structure to a structure that would report to the District at the local level.

This proposal was referred to the Vice President, Sales and the Chief Human Resource Officer for review. What is the status of your review of this proposal?

We have received information that now there are two Postal Service Areas that are conducting "pilots" where detailed employees, (not headquarters employees) will be used to receive leads that will be contacted via telephone. A determination will be made by the individuals making the calls if a sale can be completed by the call or whether the sale will be given to District employees or Headquarters Sales employees.

With this pilot be expanded nationally? Will this cause redundancy in harvesting Sales? Won't this impact the Sales goals of Headquarters employees and cause in-fighting between three groups reporting to two or three different structures? This pilot indicates to NAPS that we should place Sales under postal Districts.

## USPS Response:

Mr. Rucker responded that he does not believe that it is necessary to change the reporting relationship of Sales from its current structure. Sales has already undergone several restructurings and another one is unnecessary. Mr. Rucker said that some of the initiatives that he is planning to implement would alleviate most of the issues that NAPS had cited in their proposal to move Sales into the operations group.

Mr. Rucker shared some of his impressions of the Sales group that he has already developed in the three months that he has been in the position. Mr. Rucker stated that he has been impressed with the dedication and knowledge that he has found in his interaction with individuals in the Sales group at all levels of the Sales organization.

Mr. Rucker has already embarked on making many operational changes in Sales as he realizes that much needs to be done to increase the amount of time that Sales employees spend with customers and decrease the amount of reporting requirements and time not spent in sales mode.

Mr. Rucker explained the current pilots that are being tested in the field to utilize an inside sales force to work on leads from contractors and postal employees to sort out possible leads that can either be closed by the inside sales force or funneled to the appropriate work group in Sales. Small business leads should be in BCDC and not with Business Solutions Specialists.

Mr. Rucker explained that he has found that a significant amount of effort is necessary to chase down leads that are not productive enough to warrant the effort of the Sales force, and this is why the inside Sales force, described as "Revenue Drivers" can play a vital role in following up on leads and ensuring that customer contacts remain high but that resources are properly utilized.

Mr. Rucker appreciated NAPS' providing our proposals on Sales and used the document as he made his own assessment of the current Sales organization.

Mr. Rucker has already undertaken the action of communicating directly with Sales members in the field and will continue this effort. He wants feedback on what is working, what isn't working and what can be done to make the job easier to manage. Mr. Rucker said that he would give fair hearing to any proposals that NAPS has relative to improving Sales.

Mr. Rucker added that he wants to change the focus in Sales from an individual success model to a model where Sales employees would work in teams in dealing with customers. Performance measurements would be more team based so that individual effort will be coupled with a team effort to increase revenue.

Mr. Rucker stated that he was in the process of developing a Mentoring Program to develop individuals at all levels of Sales to create more teamwork in meeting the expectations of customers and to increase revenue. This program will allow Sales members to share their experiences and develop better sales skills. There will be more about this initiative soon in the field.

## **Agenda Item 2:**

When you assumed the position of Vice President, Sales, NAPS recommended that you consider rescinding discipline that had been issued to Sales employees that was based on Failure to Follow Instructions as it related to not meeting a manager's instructions to achieve a certain amount of opportunities and/or closed sales in a specific week.

It has been NAPS position that instructing employees that they must achieve a specific number of sales opportunities with customers and the inability to successfully obtain leads, when the employee who received the instructions made every effort to accomplish their assignment.

Further, additional discipline has been issued following the issuance to our members of Success Improvement Plans (SIP's) where a SIP is instituted by management for a period of months and if the recipient of the SIP fails a single incremental element of the SIP they immediately receive discipline.

Based on the likelihood that the implementation of this year's Pay for Performance Program will not generate base salary increases or cash payouts, NAPS again requests that we rescind all performance based discipline that has been issued as a result of failing to follow instructions to achieve certain goals and/or targets and start over fresh in the new fiscal year.

**USPS Response:**

Mr. Rucker responded that he is quite familiar with the correct way to utilize discipline to improve performance and/or deal with non-performance. In his first three months on the job, he initiated a review of current discipline of Sales employees. His review resulted in 23% of the Letters of Warning and 43% of the SIP (Success Improvement Plans) have been rescinded.

At the present time, prior to issuance, all discipline must be reviewed personally by the Vice President, Sales prior to it being issued.

NAPS brought out that many of the disciplinary cases were issued without the employee having the opportunity to respond as there were no Investigative Interviews conducted. Mr. Rucker responded that he will not allow the disciplinary process to be implemented in Sales without the employee having the opportunity to participate in an Investigative Interview. Mr. Rucker advised NAPS that he would not allow any discipline to be moved on Sales employees without this process in place.

**Agenda Item 3:**

Where do plans stand to replace the present reporting system (Customer First) used by Sales to track the cycle of customer contacts and Sales?

**USPS Response:**

After coming on board in Sales as the Vice President, Mr. Rucker undertook a high level review of the entire operations. One of the things that stood out is the reporting requirements that Sales employees have to deal with.

Sales is now working on streamlining the reporting requirements that are now in use to make the reporting requirements less cumbersome. His ultimate goal is the realign the entire reporting program but this is difficult due to the high costs that the Postal Service would incur with a new system.

Mr. Rucker urged NAPS to continue to provide feedback on the problems that our members encounter.

**Question 4:**

How can we make EAS goals in Sales individualized instead of generic goals that are developed for specific positions in the Sales organization? Due to the variances in the geographic and demographic sizes of the territories our members are assigned, we believe that providing identical Sales goals is not realistic. We recommend that Sales goals be established that are more realistic based on the geographic areas that are assigned, rural versus urban.

Also, at the present time, Sales employees do not receive any adjustments on their daily/weekly/annual goal requirements based on their use of leave, except for FMLA Sick Leave.

NAPS would like Sales to make adjustments in the requirements that are given to our members in Sales based on time that they are not on their assignments. These times include; meetings, annual leave and non FMLA Sick Leave.

**USPS Response:**

Mr. Rucker was not in favor of developing individual goals that would be geographically based. Instead he advised us that he had just held a teleconference with Sales employees the prior day (9/22) where he outlined the direction of Sales with respect to performance expectations, revenue measurement, etc. Mr. Rucker added that there will be an overall increase in the expectations of increased revenue for FY 2012 that will be challenging.

Mr. Rucker believed that some of the infrastructure changes that would be implemented in Sales would assist the employees in increasing sales to meet or exceed their goals in FY 2012 and beyond.

**Additional Discussion:**

NAPS requested and was granted an invitation to participate in all future teleconferences that are held with Sales employees so that NAPS will hear the same messaging and will be allowed to provide feedback to many of the new initiatives that Sales will be implementing in the coming months.

NAPS also requested to have additional discussion on Agenda item # 2 concerning the discipline that remains after the purging that took place that was explained in a response to Agenda Item #2. NAPS requested to have the opportunity to initiate dialogue with Sales Managers concerning the discipline and SIP's that still remain live in our member's records. NAPS believes that a review of the performance of individuals who had been disciplined in the past may find that the performance that caused the discipline or SIP to be implemented has been resolved. NAPS offered that a meeting to discuss the live discipline may be productive and result in an agreement that the discipline could be rescinded.

Mr. Rucker agreed that he would support dialogue between managers and their subordinates to discuss the reduction and or elimination of current discipline and SIP's. Should a member of Sales initiate a request for a meeting with their manager, Mr. Rucker would support the process.

NAPS and Sales agreed that another meeting would be scheduled in six weeks to continue the dialogue. At the next meeting, Mr. Rucker stated that he would be in a good position to let NAPS know the level of success the USPS had with reengineering the reporting systems that they now plan to change.

The meeting adjourned at 1:00 p.m.