

MTAC Workgroup 123
Service Information Needs, Reporting, and Communication Channels

October 30, 2008 Meeting Notes

Opening Remarks

Becky Dobbins performed roll call, reviewed the minutes of the last telecon, and noted that the next telecon may feature a presentation by Pritha Mehra, USPS, about the USPS system that will be producing outputs of customer data elements.

Parcel Group Update

Don Mallonee gave an update from the parcel group. He said the group used the parcel users' wish list to walk through issues. He noted that a paper reporting issues would probably come from the group at the end of its work.

Juliaan Hess, USPS, noted that shape-based subclass reporting was not included in what the USPS currently plans to report, which is something parcel users are requesting. Mr. Mallonee noted that some granular data that could get you to the subclass differentiation is available today in the EDW system if you drill down through existing reports and functionality. It is not available as a specific report, but can be obtained. They also noted that data on outliers can be obtained at the 5-digit level, but again, you have to drill down through existing reports to get to that level of granularity.

Mr. Mallonee reported that the group has much interest in knowing the guiding principles/business rules the USPS uses in terms of data exclusion/inclusion, so the group is working through that. The group agrees that a guiding principle should be to bring as much data as possible into measurement. The group also discussed internal measurement and the business rules. The parcel summary report will be updated as it relates to the USPS corporate measurement system and performance targets. The group will continue to discuss the business rules and inclusion of as much data as possible.

In terms of the data not being included today, incomplete shipments (e.g., Parcel Select) seem to cause a large part of the problem. The group is discussing how to bring more of the existing parcel data into measurement, but further discussion is needed. There has not been any analysis yet to see which error codes are the largest contributors, but incomplete shipments are suspected as a main issue.

The group also discussed the start-the-clock events for different types of parcel entry. The industry is concerned as to how Parcel Select pieces are handled for eVS versus PVDS shipments. Another update will be made in the USPS reports, Mr. Mallonee noted. The group will discuss in more detail start-the-clock issues and clarifications.

Mr. Mallonee said that the group had questions about how the USPS filters the raw data for existing systems. He said the USPS applies its business rules, and the group will discuss the issue further, with the USPS presenting the main filters it uses.

Another issue the group needs to discuss, and which the USPS wants some input from industry on, is how long the data should be kept by the USPS (recognizing the cost factors involved) and made available to mailers. Currently the data is maintained by the USPS on SMTP servers for 30 days – after that time, it is deleted, but mailers could download the data and store it for longer themselves if desired.

Another topic discussed by the parcel group was the need for increased communication about the new service standards and measurement systems. Many people are still unaware that the USPS adopted new service standards in December 2007.

Angie Burns reported that the USPS has scheduled a webinar for its 400 BSN employees to review the BSN tool for reporting Standard Mail service issues. It has been out there for about a year, she noted, but the USPS wants to ensure that all employees are aware of the tool and know how to maximize the use of it. After the webinar, the USPS will determine how best to target communications with specific customers that would benefit from knowing about the tool and using it prior to contacting the BSN. Mr. Mallonee noted that this is not a big focus of the reporting group, but is linked because it helps ensure that issues are tracked and resolved as they are being worked.

Ms. Burns reported that the BSN is also doing communications to bring more awareness to the new service standards, and can give an update at a future meeting.

The USPS parcel group will work on report changes agreed to by the parcel group. Mr. Mallonee noted the changes cannot be made tomorrow, but soon. Some interim abbreviated reports may be available until new reports can be developed. Mr. Mallonee and Ms. Hess will work on the reports, prioritization, discuss with the parcel group, then take the discussion offline before bringing an update back to the group. Parcel group participants should e-mail Mr. Mallonee with dates not good for a next meeting within the next two weeks.

Workgroup Process Review

Bob Fisher, USPS, walked the group through a review of progress to date and re-cap of the key issues identified so far. The objective of the discussion is to review the workgroup mission against our progress and define the next steps. He reviewed the workgroup mission statement and desired results (a copy of his presentation was distributed to workgroup participants prior to the telecon).

Key Issue # 1: The exchange of actionable, granular, and timely data is fundamental to performance measurement processes. Further definition is needed:

- What exactly is actionable, granular, and timely data?
- What are the specific roles / uses for actionable data?
- What are the different USPS / customer needs for actionable data?
- What are the expected results from actionable data?

The group discussed this issue. Kathy Siviter suggested that performance measurement processes are not the only overarching business need that should be included. The exchange of data also will help add value to the mail, and help business customers more effectively manage their businesses. It's not just about service performance measurement, although it is hoped that measurement will lead to service improvements, identifying and resolving service issues, improving operational efficiencies, etc. She suggested that the concept be broadened in terms of its perspective.

Ty Taylor asked what the USPS considers "actionable" data? Mr. Fisher responded that it depends on the service issue. In some cases, the goal may be to locate mail that is not being processed, in another it may be an after-the-fact review of why service standards were not met. What constitutes actionable data may vary depending on the goal or type of service issue.

The group suggested there are three different types of data: pre-delivery, immediately following delivery, and historical (for review/planning purposes). The type of data needed can vary by business type, or function within the business itself.

Mr. Fisher asked the group to consider the issue and add more meat to the concepts. It is important that the end result us usable data for both the USPS and the industry. There is some data available now, but how usable is it? If you want to plan a mailing, data is available for the service standards. Ms. Siviter cautioned that the service standards are a goal, not actual data on performance, so there is a difference. The group agreed that the matrix initiated by Todd Black would be useful to flesh out more to define what types of industry functions need what types of performance data.

Key Issue # 2: The requirements of performance measurement and improvement has both common elements and product specific components. Actionable data use, needs, and expected results will vary based on mail class – FCM, Periodicals, Standard, and Parcels.

- What are the common elements of actionable data?
- What are class specific requirements?

Ms. Siviter noted that per the discussions on workgroup 114, there is more commonality in the needs of the various product types/mail classes in terms of measurement data than there are differences.

Key Issue # 3: Mailer-provided reports need standardized format, business rules, terminology and/or clear documentation that explain reports/assumptions.

The group discussed this issue, with some confusion as to why mailer-provided reports should be a focus of the workgroup. If our goal is to share a common data system and reports, we should not spend time working on development of industry-provided reports, because it would continue the existing issues with USPS and industry having different, sometimes conflicting, service data. Mr. Fisher said that mailer-provided reports could be needed in the interim, depending on the time line for development of another system. Could the group work to clarify that process and data elements in the short term? Ms. Siviter suggested we table the issue until we know more about the time line for developing a new system. Pritha Mehra has been invited to speak on this issue.

Mr. Taylor noted that ultimately the USPS should be sending mailers reports on their service data – it should not be a case of customers sending USPS that data and analysis. While mailers may need to do those functions for internal diagnostics, he noted, the USPS' competitors do not expect their customers to send them reports on their service – they send the reports to the customer.

Key Issue # 4: Service performance interaction process (mailer-BSN-operations) needs to improve the use of standardized actionable data, including an escalation process.

There was little discussion on this issue, but Ms. Siviter said there is a need to establish a formal process for customers to use in resolving service issues with the USPS. The USPS has said it wants to utilize its BSN network for resolution of service issues, but what about customers that aren't big enough to use the BSN process, and there also is a need to more formally establish what the process is, how it should work, what escalation or appeal processes exist, etc.

Key Issue #5: The process for major mail delivery disruptions (i.e. hurricanes) through RIBBS is working well. Workgroup discussion points to the need to expand this type of reporting process to reflect smaller scale disruptions and localized performance problems (i.e., mail backlogs, facility issues). The concept of an “early warning system” has been proposed in various concepts.

- How could the current process be expanded to better address mailer needs for real time entry issues)?
- What would an ideal “early warning system” for Standard Mail entry be defined and used?

Ms. Siviter asked why the second bullet point included Standard Mail only, and Mr. Fisher responded that it would not necessarily be limited, but that Standard Mail is a product that needs that type of information.

The group discussed the types of occurrences that should be reported in such a system. There may be a difference in how inclined facilities would be to report delays that are caused by things beyond their control (e.g., power outages, etc.) versus management issues or things within their control. Would the situations to be reported only include instances where the USPS wants the customer to re-direct mail? Ms. Siviter suggested that re-directions should be included, but also situations where delays of more than a day are likely, so that the mailer can make the decision to either re-direct mail or alter their mailing activities to accommodate the change in anticipated delivery.

Mr. Fisher said the group needs to define the concept and set criteria for what would be reported. There are situations now reported on RIBBS (e.g., hurricanes, etc.), but there are other situations such as facility activations, backlogs, short-term delays, etc. There are different ideas on what should and could be included, which the group needs to identify.

Ms. Siviter noted that the USPS used to post on its web site color-coded reports on BMC conditions that let mailers know when significant delays are being experienced so they can make decisions in their mail entry planning processes. Mr. Fisher said the USPS is talking internally about its new color coding processes and what information could be of value to industry. The USPS wants to know what changes it could make that add value to the mail or improve business processes for customers.

Issue # 6: The Postal Service has not clearly defined for the mailing industry what it is building for itself in terms of an internal service performance diagnostic system. This internal system is expected by mailing industry to provide aggregated performance metrics (i.e. actionable data).

- What are the USPS internal plans for IMB-based performance metrics and reports?
- Will these create the opportunity for aggregate performance metrics that meet industry needs?
- What is the schedule for USPS provided reports?

Mr. Fisher said that the ball is in the USPS’ court to provide this information to the workgroup. Ms. Dobbins noted that presentations are planned after the system presentation by Pritha Mehra. Note that the USPS has already committed to the Postal Regulatory Commission (PRC) about the types of reports that will be generated and postal internal reports will mirror those formats. Please refer to the June 2008 document posted on the PRC web site June 18, 2008.

Mr. Taylor asked when the USPS plans to share its baseline performance targets. Ms. Dobbins said that the targets need to be approved by the USPS’ Board of Governors, then will be shared with industry. That may

happen at the next MTAC meeting, she suggested, but the information will be shared with the group as soon as possible.

Issue # 7: Certification process with the appropriate ongoing quality measures

Ms. Siviter asked what this issue means, and Mr. Fisher responded that the USPS also was confused by this one. The group briefly discussed its interpretation of the issue, saying that it may refer to the need for data quality processes. Mr. Fisher asked the group for more input on this issue.

Other Issues. The USPS asked what other key issues should be included on the list. Mr. Taylor asked that measurement aspects of early delivery should be included in the group’s discussion. Mr. Fisher suggested that measurement on early delivery could be part of the diagnostic system.

Mr. Taylor also said there is a need to firm up the start-the-clock and stop-the-clock indicators for measurement purposes. Mr. Fisher said that the group needs to clearly firm up the rules for start-the-clock and stop-the-clock, as well as clarifying how pieces end up in service performance measurement. Again, please note that the general business rules for start and stop the clock were published in June 2008 on prc.gov.

Ms. Siviter said the group should re-visit the commitment from the USPS during the workgroup 114 meetings that the data excluded from service performance measurement because of quality issues, for instance, is still of significant value and should be accessible by both the USPS and industry. Mr. Fisher agreed that scan performance means different things to different companies.

Action Items

The following list represents new action items added from today’s telecon, as well as those still pending from the prior meeting.

New or Pending	Action Item	Assigned To
Pending	Subgroup to put together list of criteria for USPS reporting data on potential delivery delays at a more granular level than disaster reporting provided today via RIBBS	Subgroup
Pending	Workgroup participants that use service performance data systems today should advise the USPS of what issues they face in terms of data management and storage.	Industry Participants
Pending	The USPS will check on the status of plans to continue distribution of the service standards disk tool.	USPS
Pending	The USPS will review and respond to the list provided by PCH showing the types of discrepancies over a one month period between the USPS’ EDW data and DelCon data from PCH’s consolidator.	USPS
Pending	The USPS will update and re-distribute the comparison grid showing what workgroup members are doing in terms of measurement data.	Becky Dobbins

New or Pending	Action Item	Assigned To
Pending	The USPS at a future meeting will present information on the data systems it envisions having in place in the future, for its internal use.	Pritha Mehra
Pending	Provide the USPS with additional agenda items for upcoming meetings	All participants
Pending – need ASAP	Workgroup participants will submit to the co-chairs a one-page, easy to read, simple outline of their recommendations in terms of what they want from service performance measurement that they do not get today.	All industry participants
Pending	Workgroup participants will review the roster when they receive it to identify any participation gaps in terms of industry segments that should be encouraged to participate.	All participants

Next Meeting

Ms. Dobbins noted that the next meeting, which was scheduled for November 5, needs to be re-scheduled. She suggested Friday, November 7, 2008, starting around 11:30 a.m. EST. A notice will be sent out to workgroup participants confirming the next meeting date and time.

In addition, the following future meetings have been scheduled:

Wed., November 12, 2008 Telecon 12:00 noon - 1:30 pm EST

Tues., November 18, 2008 In-Person/Telecon 1:00 pm EST (Room 2P310, USPS hq)