

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

December 16, 2008 Meeting Notes

Parcel Group

The parcel group reported that it did not meet this week but has a meeting scheduled for Thursday. The group will discuss the final report and assign writing tasks. Becky Dobbins, USPS co-chair, noted that the workgroup will use a report format similar to that used by MTAC Workgroup 114, with which participants should be familiar. She reminded the group that the systems for parcel tracking and reporting are more mature. The group is engaging in intense discussions and will have recommendations from industry on future enhancements. Gaps also will be identified in the report.

Short Term Deliverables

Ms. Dobbins noted that the activities being pursued by Bob Fisher help identify things industry would like to see happen both now and in the future. The discussions deal not just with problems of today but the solutions of tomorrow.

Mr. Fisher presented slides used previously on the key issues, noting that the smaller group will be used for refinements as necessary but the larger workgroup discussion on the slides is needed at this point. He reviewed some of the elements the USPS proposes are needed for service data reporting by mailers in order to provide actionable data for the USPS. The below is not an all-inclusive list of what is in the USPS' document, simply those elements which the group discussed on the call.

USPS organizational structure cross-walk tool. Mr. Fisher noted that there is a need for the USPS to match its organizational structure in service data reports so that managers can be held accountable and understand their performance. So how would a company know the USPS' organizational structure? Mr. Fisher shared with the group an internal document he used to create a cross-reference that could be used for companies creating service reports. The USPS has used such a tool over the years for data provided by mailers, he noted.

Jody Berenblatt asked if the crosswalk tool would need to be updated to reflect changes being made to the USPS' network, or whether changes would not impact the line up of facilities within a District, etc. Mr. Fisher responded that if the USPS changes the plan location where a 3-digit ZIP Code area is assigned, the crosswalk tool would need to be changed, but it has done these types of changes in the past to keep up with facility realignments. He said the USPS is hesitant to publish the tool because the USPS needs to own it and update it with some frequency for it to be accurate. There may be AMS products that do the same thing. Someone within the USPS has to own the tool if it becomes a permanent thing. He also noted that the version distributed to the group likely has some errors or nuances that need to be documented.

Ms. Berenblatt said that if the USPS needs data aligned by its organizational structure, then such a tool is needed and it definitely needs an owner. Linda Kingsley said the USPS also needs to look at how it lines up with the labeling list redesign. Kathy Siviter suggested that the USPS work internally with Chris Oronzio as the manager working on the development of the Critical Entry Time (CET) database, or with Jeff Williamson, who is working on the labeling list

redesign project.

Destination-based vs. delivery-based approach. Mr. Fisher said that it needs to be determined whether service data reports should use a destination-based or delivery-based approach, which are two very different things. What is the best way to handle ASFs, for instance – include them in BMC reports? Some reports bring focus to the District and a 3-digit ZIP Code structure around delivery points and accountability, others focus on the entry points. There is a need for both, he suggested.

5-Digit Data. Mr. Fisher said that there is a need for 5-digit level data when there are problems and further data is needed to identify the root cause. If service performance is ok, there is less need for 5-digit level data. This type of data can become very detailed, so some guidelines should be provided.

Identification of Mail Make-Up. Mr. Fisher said the identification of mail make-up can help the USPS improve service.

Business Rule Identification. For some reports, it is not clear what the assumptions are that underlie the data, such as Sunday/Holiday rules, etc. Guidelines need to be established on the business rules if the data is being shared between the USPS and the mailer. If the business rules differ from those published by the USPS for measurement, the mailer should provide a document to explain the rules used.

On-Time Service Performance. Mr. Fisher noted there is confusion between on-time service performance versus scan rate performance, which are two separate and distinct things.

Requested In-Home Date Performance. For reports that use requested in-home dates, the window needs to be defined when it differs from the established service standards.

Pieces Excluded from Measurement. Reports should quantify what data is excluded and why, and how those pieces can impact the mailing value.

Trend and Graph Reports. Mr. Fisher noted that graphs can provide a nice illustration of service data, and can be better than lengthy reports. Trend reports help show performance over a period of time. The USPS tracks individual reports to create processes, he noted, and having the data in Excel format helps with that. Highlighting of exceptions also helps.

Report Transmittal to the USPS. How reports should be transmitted to the USPS needs to be clearly defined, Mr. Fisher said, noting that he is still writing that part. There are many different ways today to give data to the USPS. The BSN recommends if mailers work with them they can then pass the data to the appropriate headquarters staff and BSN managers. Some reports currently are sent to National Account Managers, some are sent to local plant managers. There should be a planned distribution of the reports with the BSN as the center.

Mr. Fisher noted that lots of folks have worked to gather this data. There are a variety of data types and people will continue to provide data even after the USPS publishes measurement reports.

BSN Update

Angie Burns provided an update on the BSN Service Updates web site. One recommendation is that links to other

areas of interest and related topics be included on the Service Updates page, such as links to the service standards, so that customers have easy access to that information. The In Home Date guidelines and modern service standards links have been added to the Service Updates page, Ms. Burns reported.

The BSN also wants to become more proactive in providing information around changes happening with the USPS, such as the upcoming route changes and what mailers need to do to keep updated with AMS products, etc. Often the BSN is reinforcing and communicating information from other USPS groups, she noted.

There currently are different distribution lists for service reports, depending on how the information comes to the USPS. It is a project for the BSN to put some structure around that, she said, so there is a simplified method to take reports from various sources and for the USPS own internal use to make a more systematic method of distribution and clear focus for USPS diagnostics and what the USPS does with the information.

Ms. Burns said that the BSN group will develop a template of what customers would like to see posted on the web site, then will develop and put the information up. The BSN feels it also can help frame how the USPS is utilizing customer service reports and whether they are reaching the right audience. At some point the USPS will have more internal diagnostics around IMb and reports will be developed, she noted. But what will the BSN do with the information, how will it get analyzed and get to where the USPS needs to look and who needs to be contacted – the BSN would like to start development of what to do with the data, analysis and tracking of action items from reports. The CustomerFirst system will continue to be used to track customer issues, whether they are brought to the USPS or identified from a specific report. But the communications back to the appropriate USPS groups needs to be better defined and executed.

The BSN would like to be more proactive rather than reactive, Ms. Burns said, taking a deeper look at customer reports, doing more analysis, as opposed to trying to fix a specific problem. But there are hundreds of USPS internal reports that could support or further define where issues exist. The BSN needs to be looking in the right place at the right information to understand and resolve issues.

Ms. Berenblatt asked if the BSN has a vision of the time frame for its next steps, and Ms. Burns said more details need to be mapped out, but she would love to have something out by the March time frame in terms of development of BSN training materials, distribution of reports, and methods to consolidate or bring data together. Ms. Dobbins noted that some Areas have developed templates to put reports together. Ms. Burns said there are about three Areas doing that with some success, but because data is available on a web site, it does not mean it is actionable.

Ms. Dobbins said it is important to include a customer volunteer to work with the BSN on its action plan for consolidating data. Ms. Berenblatt suggested that her company, through Charlie Mancuso, is already volunteered.

Mr. Sexton re-capped that the short term approach would be trial implementation of the approach proposed by Mr. Fisher and the BSN. In the longer term, customers will have their data and the USPS will have its data and we will engage in discussions on service issues. Ms. Berenblatt asked for clarification – isn't the USPS' and our data the same data? It can only be different data if we are seeding, otherwise it is all the USPS' data that customers have access to, not different data. Mr. Sexton clarified that in the short term customers will continue to get their own data and share it with the USPS to discuss service issues.

Ms. Dobbins reiterated that the USPS is not going to tell customers what they can or cannot do in terms of providing the USPS with data. The USPS is attempting to put some structure to the requirements to ease the dialogue and ensure we are communicating the same way. There are many elements in the report that will drive the requirements for the

IMb system once it is up and running. If someone eventually decides not to use seed data or some other means of monitoring their service, that's their decision, she noted. But customers are likely to keep monitoring performance. Ms. Dobbins noted that mailers using the Full Service IMb option also will get reports on mail quality to facilitate those dialogues. If 70% of the mailing is included in service performance measurement and 30% is not, the report will tell why. That dialogue will help improve mail quality and allow the USPS to make adjustments in its processes, she said.

Ms. Berenblatt asked if the BSN expects to have direct access to the Full Service system, and Ms. Burns said the BSN may have access to some of the reports, but there are many questions at this point. Ideally the BSN would have a location to pull reports from, or preferably would get reports pushed from the IMb system. Ms. Berenblatt expressed concern that the deadline for specifications to push information to the BSN system has already been missed. Ms. Dobbins said there is still time, but it can't be data pushed to a billion points. It is critical that if the USPS can push it into a usable format, the BSN can access the information for customer and postal manager discussions.

Ms. Dobbins said she has drafted a strategic over-arching document for output from the IMb system, which Mr. Sexton and Mr. Fisher have reviewed. It is not very extensive, but covers some things the group has talked about. It won't be reviewed today, she noted, but outlines what industry would like to see in terms of aggregate data, not customer-specific data. Container scan data, for instance, would be available to specific customers, but not as aggregated data. There are vendors who want to take data and manipulate, analyze and provide it to their customers who purchase that information from them. There also is some Confirm-like information, but that is a separate product discussion. Ms. Dobbins said she has tried to put together in a short two-page paper a synopsis taking the key elements outlined by Mr. Fisher and identifying data formats the workgroup is looking for as an output from the IMb system.

Ms. Dobbins asked the group to review the document, which was distributed, and provide her or Mr. Sexton with comments as soon as possible. She said some of it is controversial, such as 5-digit level data. Ms. Berenblatt said she is concerned about the time lines around the recommendations Mr. Fisher outlined, specifically the mapping of facilities. She is worried folks are doing work to give the USPS data that is out of sync, which the USPS has to re-work in order to make it useful to the USPS. Ms. Dobbins noted that the IM system is being built in phases, with some starting in fall of 2009.

Ms. Siviter noted disagreement with the statement in the draft that says service differs for manual mail versus automation mail. Since the same service standard applies to both types of mail, she noted, the performance should meet the standard for both automation and manual mail.

Wendy Smith said the comments on separate reporting by shape seem contradictory. Is there a distinction between reporting and setting targets? The USPS considers information sufficient by class, not shape, in the reports to be provided to the PRC, and the USPS plans targets by class well into the future. Ms. Dobbins said the targets are set by class as delineated in the final rule published last year in the *Federal Register*, but the USPS understands industry would like to have performance results broken out by shape. Ms. Smith suggested that if reporting is by shape, and performance is noticeably different between shapes within the same class, then the performance targets should be different as well in the future, which would be a natural progression. Ms. Dobbins said the USPS anticipates it will review results and keep the targets the same, forcing improvement in shape categories not meeting performance targets, unless some major operational change is made that would substantiate a difference.

Ms. Smith said the PRC suggested reporting by shape on MTAC workgroup 114. Ms. Dobbins agreed and said that may come out in their public comment period for reporting requirements. Industry also likely will push for that in their comments. But the USPS believes that reporting by class is sufficient because they don't want anyone to handle

individual shapes with less intensity. Ms. Smith said they need to be reported separately in order to identify if a particular mailstream is not achieving the targeted performance level.

Ms. Dobbins noted that the performance targets will be included in the USPS annual report for 2008, and have been shared with the PRC. They are aggressive targets, she noted. Ms. Siviter asked why the workgroup can't receive the information before having to read it in the annual report, and Ms. Dobbins noted the concern and said she will continue to request that.

Comments on the draft documents sent out to the group should be provided to Ms. Dobbins, Mr. Sexton, and Mr. Fisher as soon as possible.

Other Systems

Ms. Dobbins said another piece the workgroup has not yet covered was to get additional information on ADVANCE and e-PubWatch for consideration of discontinuing these programs. Ms. Siviter had pointed out several times that it is hard to determine what can be sunset until we know what will be provided from the IM system. We discussed the need to better understand what these other systems do. Ms. Dobbins will get additional information and circulate it with the workgroup so we can address the issue.

Ms. Siviter noted that ADVANCE is highly used by some large PostCom members to monitor and direct CR mail delivery at delivery units, and it can't be replaced until some measurement solution is in place for carrier route presorted mail entered at the DDU. ePubWatch tracks customer complaints for Periodicals and is only indirectly related to service performance, she said. eMIR is an operations focused communication system to provide mailers with mail preparation issues encountered during processing, such as bundle integrity issues, pieces causing jams, pallet integrity, etc.

Ms. Smith said she would like to see short descriptions of the programs as she is not familiar with them.

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	Workgroup members to provide Mr. Fisher with comments on draft document concerning shared/exchanged data elements.	Industry Participants
Pending	Workgroup members to review Strategic Vision for Long-Term Deliverables (Aggregate data) prepared by USPS and provide comments to Ms. Dobbins.	Industry Participants

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
Pending	Provide the USPS with additional agenda items for upcoming meetings	All participants

Next Meeting

The next meeting is scheduled for Tuesday, January 6, by telecon beginning at 12:00 noon EST. Future meetings are scheduled as follows, beginning at 12:00 noon EST:

Monday, January 12

Thursday January 22 (week of two holidays)