

Facts

Factual information about the target client



Responsibilities

- manages mailroom
- manages Khiet & 1 other operator
- Initiates charge back of costs for some items
- Owns & operates within a budget for some items
- Provides package shipping details to originator when requested
- Influences the next equipment purchase
- Orders supplies

Attitudes

- **Highly risk-averse** worldview. Change = Risk
- To accept change, it must have *significant, meaningful* upside with little perceived downside. *Don't waste my time with peanuts.*
- Care and concern for operators - *I have known them for many years and they do good work for me.*

Behavior

Existing behavior now because they don't have our solution

- Makes decisions based primarily on **risk avoidance** and **workflow efficiency**
 - (1) Avoidance of risk
 - (2) Sending Workflow efficiency (need to get mail out *fast*)
 - (3) Sending Workflow simplicity (need to explain/enforce to operators)
 - (4) Managerial workflow/process simplicity (his time is valuable)
 - (5) Cost (most postage is charged back, so cost not critical)
- **Chooses/prefers not to handle most shipping carriers:**
 - Different shipping workflows for different items would impact top 4 decision factors
 - Multicarrier shipping requires operators to key addresses – this slows the process and introduces risk (mail center accountability for address accuracy)
 - Easy for clients to form their own relationships with carriers
 - When internally tracking items progress within the Mail Center, would be painful to search multiple carrier histories (*I can't remember how I sent it*)
- **Distracted and pressured:** Sending is just one part of his job among other responsibilities
- Pulls data monthly from Bus Mgr and operates on it before invoicing clients – enables **retail chargebacks on discounted rates**
- **Does not offer Postal tracking** to customers, despite complying with USPS rules to apply package tracking numbers – no way to do this efficiently.

Pain & Needs

Client problems that we believe our solution solves

- **Unpredictability and heterogeneity** of items, and peaks and valleys of volume each day. *We have no idea what's coming in.*
- **Time-consuming** process for sending parcels, even through USPS: *Someone has to pick up every package... Even just typing the ZIP takes a lot of time. It doesn't sound like it should take time, but it does. Now if you imagine having to enter the data [recipient address]...*
- **Unpredictable carrier pickup times** create stress and uncertainty.
- **Customer expectation** conflates the Mail Center with the USPS: *People think that when they give the package to us, it's "in the mail." So we have to rush as fast as we can to get it picked up by the end of the day. Sometimes we only have 10 minutes between when we get it to when the mail truck comes.*
- **Maintaining relevance** in the organization is harder every year. Costs increase while volumes decrease, and increasingly the value of the Mail Center is threatened. Mail is diminishing in importance, and we are simultaneously struggling to diversify our service offerings. *It is getting harder to even justify the cost of the C+.*
- **Demonstrating accountability and responsiveness** to compete with customers' other sending options/providers. When customers ask what happened to their item, there is no way to prove it was posted, inducted with the carrier, or lost.
- **Accessing, managing, and delivering data** to clients and the Finance department every month (plus off-cycle requests) is a highly manual, time-consuming, error-prone process. Has to pull data from multiple systems, manually integrate them, operate on them, then export the right data to the right end-recipient. *I can't imagine it being more of a pain-in-the-neck.*

Goals

Goals implied by their behavior that this solution will better support

- **Self-preservation & increased relevance**
 - *I want to grow the mail center as a business and service provider*
 - *I want to consider serving additional customer needs that would diversify the type of services I can provide*
 - Additional carriers, Package tracking, Consulting services, Packaging/supplies services, Other
 - *I'd like to offer better quality of service so clients choose us over other mailing/shipping options*
- **Cheaper shipping rates** (→ increased profit): *I'd love to take advantage of the IMPB discounts while continuing to charge clients retail rates, but the value of the discount isn't enough to justify the extra work (address entry, switching between applications on C+).*
- **Improved operational excellence**
 - Process more items in less time
 - Accurately keep track of shipments processed

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Responsibilities

- Operates the Connect+ meter and ensure that the mail is ready for pick-up on time.
- Follow supervisor's direction for how to process mail
- Complete paperwork for international items and submitting it with the items

Role

- Unskilled generally but well-trained in C+ operation
- Very little decision-making authority
- Little ability to deal with exceptions
- Needs process to be standardized, with clear protocols that are easy to remember and follow

Attitudes

- *I do what I'm told – it's not my place to ask questions.*
- *My job is to run the C+, not solve problems or take accountability.*
- Motivated by clear and specific direction
- Takes path of least resistance. *If it's hard or complicated, I don't want to do it.*

Behavior

Existing behavior now because they don't have your solution

- Everything goes out in the **easiest way** (carrier, mailing/shipping service)
 - that is the default/easiest (path of least resistance)
 - David has trained her to follow this simple procedure
- Anything **unusual goes straight to David** for him to handle or provide instruction
- Speed and accuracy in mail processing are both important
 - Sometimes **sacrifices accuracy in favor of speed** – the mail has to get out on time

Pain & Needs

Client problems that we believe our solution solves

- **Stress and pressure** to process too much mail in not enough time. Items come in throughout the day, but the biggest batch comes in at 3pm and all has to be out to the carrier by 4pm. *I'm working as fast as I can, but it's not fast enough.*
- Processing **packages on the C+ is time-consuming, cumbersome, and error-prone.** Anything that exacerbates these challenges is painful.
 - **Manual data entry** from address on a package is (1) hard to decipher, (2) error-prone, (3) takes much too long to call up the ZIP screen to type it in.
 - **Measuring & manually entering item dimensions** adds to the problem.
 - All **"switching" introduces latency** and costs time – switching between screens, accounts, services, tasks, tools, etc.
 - *Any downtime or "wait-time" is maddening – I want it to go faster.*
- **Extreme unpredictability** of the items that come in – difficult to plan or process them efficiently.
 - When the mix is heterogeneous, tries to group them in handfuls where the Account number is the same to **minimize tedious switching** between settings.
 - When there are large batches of the identical packages, typing a new ZIP for every package is tedious and **time-consuming**.
 - When international items come in, it is time-consuming and **frustrating** to (1) get the paperwork, (2) take the time to fill it out, (3) struggle with forms that ask for info she doesn't know.
- **Incorrect postage** or other errors can result from working quickly or from incorrect system use. This leads to **rework** that costs money but more importantly takes time.
- **Poor visibility** and lack of closed loop between taking packages in from clients and sending them out with the carrier. The mail center can be perceived a black hole. When items are lost, there is no clarity around accountability. Khiet may be unfairly blamed, or may be unable to explain what happened to the item.

Goals

Goals implied by their behavior that this solution will better support

- Perform job to an acceptable level with the least possible effort
- Earn and maintain the supervisor's trust by following instructions faithfully
- Process all mail and packages and induct them the carriers on time, every day
- Avoid errors and the associated rework
- Avoid blame when something goes wrong

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Responsibilities

- assisting the athletic department head
- planning & running events
- planning & running promotional activities
- coaching students
- running programs
- communicating with parents and alumni

Attitudes

- *The Mail Center is run by the Post Office, right?*
- *When I give something to the Mail Center, I expect it to go out today. They just have to put a stamp on it. What's the big deal?*
- *I don't really understand mailing and shipping - and I don't really want to. It's boring, it's not my "real" job, and I have better things to do.*
- *I expect the Mail Center to know the best way to send my stuff - that is their job.*

Behavior

Existing behavior now because they don't have your solution

- Only sends mail and non-valuable / non-time-sensitive items through the mail center. Always sends by FedEx directly (not through the mail center) if item is important, valuable, urgent, or needs to be tracked. Perception that USPS is less reliable & accountable.
- For international packages, always lets FedEx handle it - experience tells him it will be faster and more trustworthy
- Assumes & expects the mailroom will make the best choice about how to send mail & packages (depending on what "best" means in that situation)
- Occasionally asks the mail center about postal rates if doing a big mailing, but otherwise not interested.
- At end of year looks at total USPS/mail spend as well as FedEx spend. If there is a big difference from last year, contacts the Mail Center to ask why.
 - Trying to understand (1) if I spent a lot more, why, and what can I do about it?, (2) how should I budget my ship/mail spend for next year?
- Addressing items
 - For items he sends through the Mail Center
 - 1-off: he just hand-writes the address onto the item
 - many similar items: may print address labels and stick them on the items
 - For items he sends himself (direct through the carriers), he uses FedEx.com and types the address & shipping data in.
- Keeps supplies (boxes, tape) in his office/department - does not use supplies provided by Mail Center

Pain & Needs

Client problems that we believe our solution solves

- **Lack of visibility** into the mailing and shipping process
 - **A package's journey through the Mail Center** is opaque to Todd. *Did it even get sent? If something gets lost, I have no idea how to find it, and I don't know whether it fell out with the campus mail guy, the Mail Center, or the carrier.*
 - Todd does not know in advance how much his **mailing and shipping costs** will be. Depends on what rate the Mail Center chooses, and when private carriers are used he sometimes encounters surprises when the "estimated cost" at time of shipping is different from the actual cost at time of billing.
- **Frustration of unmet expectations** around Mail Center service level.
 - *Sometimes the Mail Center gets my mail and packages out late - WTF?*
 - *I wish the Mail Center would proactively let me know when there's a problem.*
 - *The Mail Center should proactively tell me how to make better shipping choices (e.g. if I put things in different packaging, would it cost less? Are there shipping industry changes that might affect my shipping budget for next year?) - but then again I don't really want to think about mailing/shipping unless there's a problem*
- **Inability to make use of USPS services** such as Tracking. He doesn't want to actively track items but needs to know if there is a problem or delay, and wants it for his records. *I don't have a way to track my USPS items unless I specifically ask, and even then sometimes they forget or lose the tracking number. Why is this so hard in 2015?*
- **Complexity around shipping** combined with **ambivalence about the Mail Center** as a service provider.
 - Would like the Mail Center to handle all mail and packages so Todd didn't have to contract separately with FedEx - *but then again I don't completely trust them*
 - Would like to let the Mail Center handle shipping complexity - *but then again I don't completely trust them*
- **No process to communicate specific instructions** to the Mail Center for special cases, and **no way to verify whether they followed the instructions**
 - *Sometimes I need something to get there quicker than "regular mail"*
 - *I may need the tracking number sent directly to me, to the recipient, or both*
- Have to keep **mail/shipping supplies** on hand & remember to re-order when low

Goals

Goals implied by their behavior that this solution will better support

- **Reduce shipping pain & effort.** *I don't want to think about it - it just has to go out. I want to do the least amount of thinking and work possible, and spend the least amount of money, to make that happen.*
- **Shipping peace of mind.** *I want to trust that my items are OK and on track. For important items, I want to have more insight into their delivery status.*
- **Improved planning.** *I need to monitor my mail/ship spending in terms of long-term trends so I can ensure I'm not on track to spend a lot more than I did last year (or more than my department budget).*