

Remittance Mail Councils



Local Remittance Mail Council Guidelines

2007

Version 1



Table of Contents

Introduction.....	3
Definition of a Remittance Mail Council (RMC).....	4
• RMC Mission Statement	
• Benefits of RMC Membership	
How to Organize a RMC.....	4
• Step 1: Establish the Council	
• Step 2: Assign Participants' Roles, Duties and Responsibilities	
• Step 3: Plan a Meeting	
○ Establish Objectives	
▪ Organizational meeting	
▪ General meeting	
○ Select a Location	
○ Choose the Date and Time	
○ Determine the Number of Participants	
○ Develop the Agenda Topics	
▪ Organizational meeting	
▪ General meeting	
○ Publicize the Meeting	
• Step 4: Invite Prospective Members	
Tips for Planning Meetings.....	10
• Before the Meeting	
○ Long-Term	
○ Short-Term	
• During the Meeting	
• After the Meeting	
• Do's and Don'ts of RMC Meetings	
○ Do	
○ Don't	
Presentations.....	11
• Types of Presentations	
• Topic Suggestions	
• Presenters/Speakers	
Conclusion.....	12
Postal Service Resources.....	13
Exhibit 1	

Introduction

Remittance mail is the largest segment of First-Class Mail® and is a key component of Postal Service business. This mail is comprised of bills, statements, and payments, the majority of which use pre-barcoded courtesy reply envelopes. As a result, this mail is highly automation-compatible.

Financial institutions, credit card companies, retailers, and consumers all have an interest in the level of service provided to remittance mail. Many remittance mailers look for a competitive advantage through more timely delivery and makes remittance mail susceptible to electronic diversion. However, by aggressively pursuing improvements, the Postal Service can remain a viable and even preferred provider of remittance delivery through the mail.

If the Postal Service is to retain its share of the remittance market, it must commit to service excellence. In addition to operational discipline, a key component of continuous improvement is open communications with the remittance industry. Among top-performing districts and plants is an evident “best practice” of organized communications with remittance mailers.

Many districts and plants have established Remittance Mail Councils (RMCs) comprised of local banks, financial institutions, billers, remittance processors and postal representatives that meet on a regular basis to discuss concerns, share information and exchange ideas.

RMCs are a key component of the Postal Service’s National Remittance Certification program for mail possessing facilities that handle significant remittance mail volumes. This program is designed to standardize remittance operations and establish an optimum baseline for our major remittance cities to achieve.

The purpose of these guidelines is to provide a framework for establishing and managing a local RMC. Good communications is the cornerstone of great performance; great performance leads to customer satisfaction; and satisfied customers keep their bills, payments and statements in the mail.

Definition of a RMC

Mission Statement

The mission of a RMC is to facilitate business and operational alignment between the Postal Service and remittance mail customers. Councils are comprised of local representatives from the remittance industry and the Postal Service who meet regularly to discuss concerns, share information, and exchange ideas. These meetings provide an opportunity to develop local strategies designed to address the specific needs of the remittance community. Many districts and plants have already established RMCs and are benefiting from ongoing dialogue with this important customer segment.

Benefits of RMC Membership

All businesses that use the mail for bills, statements and payments will benefit from the RMC's regular networking meetings by maintaining a close relationship with their postmasters and other postal service managers. These meetings provide Postal Service customers the opportunity to meet other remittance mailers, postal service managers and other experts in remittance mail operations.

How to Organize a RMC

Most RMCs are created because local Postal Service managers want to improve service through partnerships with their customers. Many of the ideas below come from their experiences.

All organizers and participants should understand that the RMC's success depends on their willingness and commitment to cooperate and work as a team.

While there are several steps needed to organize a RMC, they all have one thing in common— planning. The procedures below have proved to be successful in organizing RMCs.

Step 1: Establish a Council

In most cases, the District Marketing Manager or Business Service Network Manager, lead Plant Manager or Postal Operations designee initiate the formation of a local RMC based on his/her relationship with remittance mail customers.

Participation by postal managers is crucial to the success of the local RMC. Recommended postal participants:

- Marketing Manager
- Postmaster
- Business Service Network Manager
- Plant Manager(s)
- Manager(s) In-Plant Support
- Address Management Support Representative
- Retail Operations (Box Section) Representative
- Secretary/Administrative Assistant (Minutes and other administrative functions)

A remittance industry mailer/processor who is interested in joining or starting a RMC in their area should contact their local postal representative such as postmaster or Business Service Network (BSN) representative.

Step 2: Assign Participants' Roles, Duties and Responsibilities

USPS/Industry Chairpersons

The District Manager selects the USPS Chairperson. After the initial RMC meeting, the group should elect one industry representative as the co-chairperson. The RMC industry chairperson should be established via appointment, charter or election. Participation as a chairperson and/or organizer entails time, effort, teamwork, leadership skills, determination and follow-up. A member should not agree to serve as chairperson or organizer unless he or she is able to participate as needed. In addition, it is imperative that key positions have an alternate person assigned.

Members

Membership is open to all persons involved in the remittance industry including processors and billers that are located within the sponsoring district's geographic area. A member may be part of more than one RMC but it is recommended that he/she not be a chairperson of multiple RMCs. All members are expected to actively participate in meetings/events and to protect the privacy of any information shared with the members in confidence.

Meeting Coordinator

The District Manager/designee will assign a meeting coordinator such as the BSN representative or Postal Operations Manager who will be responsible for organizing the council's activities. The duties of the RMC meeting coordinator include:

- Establishing meeting frequency
- Coordinating meeting location
- Managing the agenda
- Developing council membership
- Maintaining a file of customer contact information and tracking attendance
- Disseminating all communications regarding the meeting date and location reminders, agenda items, customized report dissemination, attendance sheets, member special alert notifications and other special requests
- Fulfilling equipment needs (laptop, projector, etc.)
- Ordering refreshments (this is optional but may include coffee, water, donuts, etc.)
- Coordinating security procedure for non-postal attendees to access the postal facility and meeting room (non-postal attendees are not permitted in other areas without proper escort)
- Arranging adequate parking
- Inviting remittance mail customers within the district to participate in the council

To facilitate communications and improve customer satisfaction, it is recommended that a list containing contact information and responsibilities be provided to the customer to ensure that he/she knows exactly which postal representative to contact with questions, suggestions or issues.

In addition, one or more remittance mailers should be selected to help plan an organizational meeting, recruit prospective industry members, and set up (charter) the council. Choosing dedicated co-organizers early in the process sets the stage for an effective council.

Secretary

The secretary/administrative assistant is responsible for recording the meeting and preparing minutes for dissemination to all attendees no later than one week after the meeting. The minutes will include basic discussions of concerns as well as any action items identified at the meeting.

Step 3: Plan a Meeting

Like most other things, successful meetings begin with good planning. Following are some basic steps to help you in planning your RMC meeting.

- Establish objectives for the meeting
- Select a location
- Choose the date and time
- Determine the number of participants
- Develop the agenda
- Publicize the meeting
- Invite prospective members

Establish Objectives for the Meeting

Organizational meeting

The main objective of the organizational meeting (which is different from the general meeting) is to establish and organize the RMC. Interest can be generated and maintained by incorporating a special event in the meeting.

The event could include a tour of the Post Office or a presentation on a major Postal Service program. It could feature a guest speaker such as a headquarters, area, or district Postal Service official.

Gain support for the RMC from those present by encouraging attendees to be actively involved in establishing the RMC. Talk about the benefits of the council. Enlist the help of the area or district office and headquarters, as appropriate.

General meeting

Once the RMC is organized, it will take planning to keep it focused on its mission to facilitate business and operational alignment between the Postal Service and remittance mail customers. This responsibility belongs mainly to the postal co-chair, with support from the industry co-chair.

When establishing objectives for the general meeting, be sure to review the mission statement of the RMC. Surveying the members on a regular basis to discover their needs is very effective.

Planning and organizing the meetings take time and effort. A good working relationship between the Postal Service personnel and remittance mailers also contributes greatly to the meeting's success.

Select a Location

The place to conduct the meeting depends on the type of presentation planned and how many people may attend. Many meetings can be conducted at the Processing & Distribution Center (P&DC) if it has conference space available. Such a location would allow tours and demonstrations to be included in the seminars and workshops. Consider conducting a meeting at a member's site for an educational presentation if a tour of the firm's remittance processing operations would enhance the presentation.

Choose the Date and Time

Local RMC meetings should be scheduled a minimum of once a quarter. Be sure to coordinate all meeting dates with postal managers as well as with RMC members. Dates should not conflict with holidays or religious observances, postal or industry events because attendance and speaker availability can be adversely affected.

The time of day to have the meeting depends on the kind of presentation planned. Late morning and lunchtime sessions tend to be popular for most RMCs. Meetings without any major event should last no longer than two hours. Every meeting should begin and end on time.

Determine the Number of Participants

The number of participants at the both the organizational and general meeting is predicated on the number of local remittance mailers and processors. Try to ensure that there are a sufficient number of people to represent all facets of the remittance industry operating in the local area. Develop a clear process for participants to respond including the name, email and phone number of the person assigned to this task.

Develop the Agenda Topics

Organizational meeting

Below is an example of agenda topics for a RMC organizational meeting:

- Introduction:
 - Describe a Remittance Mail Council (RMC)
 - Discuss the benefits of membership
- Business:
 - Present the proposal to establish a RMC
 - Provide an overview of roles and responsibilities for leadership positions
 - Establish council leadership positions
 - Seek a commitment from those in attendance to participate
 - Begin planning the first general meeting

General meeting

Individuals close to the day-to-day operation of Remittance Mail processing should be involved in preparing discussion topics and agenda. The discussion topics could include a variety of subjects related to remittance operations. Specifically, these topics are usually service-related or add value to a remittance processor's operation.

It is important to note that to protect confidentiality of the organization, it is best to schedule one-to-one meetings to discuss individual company issues.

Discussions could involve a field expert to make a presentation as well as provide demonstrations. Discussion topics should be prepared in advance of the meeting. In addition to presentations and discussion topics, a tour of the facility for all or some members may be useful.

Publicize the Meeting

RMC meetings are open to all remittance industry mailers, so advertise the meetings well. Below are ways to announce the meetings:

- Send a letter inviting to all remittance mailers (inbound and outbound) in the local area. A form letter (such as the one shown in Exhibit 1) is good, but a personal invitation is better
- Extend personal invitations. Industry members should feel free to invite other interested industry leaders
- Work with the District Marketing Manager to advertise at all postal retail locations in the area
- Use newspapers, radio and television public service announcement services
- Promote the meeting at various group mailer meetings and training such as PCC's, bulk mail preparations classes, bar-coding instruction sessions, and other mailing industry association meetings

Step 4: Invite Prospective Members

There are several sources for identifying prospective members. Organizers probably already know many local remittance mail managers who would be interested in joining.

The RMC should include local customers from the remittance industry such as:

- Commercial banking institutions (Lockbox)
- Credit Card issuers
- Other financial institutions
- Billers
- Remittance processors
- Third-party processors
- Insurance companies
- Mortgage companies
- Utility companies
- Telecommunications providers

Other than remittance mail customers and various postal representatives previously mentioned, special guests may be invited to attend meetings including company executives, remittance processing consultants, postal operations supervisors, postal inspection service and postal headquarters personal.

Tips for Planning Meetings

Before the Meeting

Long-Term

Do the following well in advance of the meeting (weeks or months):

- Determine what topics members are interested in
- Determine the objective of the meeting
- Determine the type of presentation
- Determine the location to hold the meeting
- Determine the best date and time to conduct the meeting
- Confirm the date and time
- Reserve the meeting room
- Choose a guest speaker and alternate. Issue an invitation to your guest speakers. Be sure to include where the meeting will be, date and time scheduled to speak, amount of time allotted, transportation arrangements, and audiovisual needs

Short-Term

Do the following as the meeting date approaches:

- Send invitations to all members
- Provide for people with disabilities, if applicable. For example, be sure the meeting is wheelchair accessible, and provide an interpreter if you know of a hearing-impaired person attending
- Publicize the meeting to other interested people and organizations, including postal employees
- Check that promotion and publicity for the meeting have been prepared to the local media
- Arrange room set-up including, audiovisual equipment and refreshments if applicable
- Use name badges and/or tent cards. Have blank cards/tags available for last-minute guests
- Follow proper security procedures. Provide the required information to the Postal Police and arrange an escort for all non-postal participants

During the Meeting

Aside from actively participating in the meeting, plan to do the following:

- Keep room temperature comfortable.
- Stay on schedule.

After the Meeting

At the end of the meeting, be sure to do the following:

- Accompany all non-postal participants to the exit.
- Send a note of thanks to the speaker
- Prepare minutes of the meeting and share with members

Do's and Don'ts of RMC Meetings

To ensure that the meetings succeed, here are some tips to keep in mind and pitfalls to avoid:

Do

- Plan carefully
- Be well organized
- Pay attention to details
- Project a professional image
- Solicit members' comments and suggestions for improvements
- Consider travel time for members
- Ask open-ended questions when you want to stimulate a discussion

Don't

- Allow individual participants to control the meeting
- Plan too many activities or create an inflexible schedule
- Compromise an organization's confidentiality

Presentations

Presentations provide members important information about mailing requirements or specific postal products and services. These types of presentations benefit the members by providing the information they need to make educated business decisions.

Types of Presentations

An industry person, postal employee, guest speaker, panel session or a combination of presenters can conduct seminars.

Training/workshops usually provide information that includes demonstrations and an exchange of ideas. Audience participation is a key element of this type of session. Many RMCs regularly schedule this type of meeting to encourage member participation.

Topic Suggestions

New regulations, products or services provide excellent topics for meetings. Topics for presentations are infinite and can be tailored to meet the needs of the Postal Service as well as the local industry community.

Here are some possible topics to feature in your presentations:

- Intelligent Mail®
- Navigating the USPS Web site
- Mail piece design
- Mail center security
- Special services

Tours of postal facilities allow remittance mailers to observe the processing operations and high-tech machinery. Tours can also provide a background for discussing certain procedures and guidelines. Remittance industry representatives can see first hand how these procedures and guidelines facilitate handing of remittance mail.

Presenters/Speakers

Choosing the right speaker is paramount to a successful presentation. Presenters can be postal employees, industry representatives, or guest speakers. Always strive for the most knowledgeable and qualified speaker for the topic. Be sure to allow ample time when requesting a headquarters or industry speaker since these people are asked frequently to speak and may be committed to other speaking engagements.

Conclusion

The Postal Service and the remittance industry face a future increasingly defined by changes in technologies and consumer behavior. To meet the needs of our mutual customers, the Postal Service and its remittance industry partners must establish open communications to discuss concerns, share information and exchange ideas. Remittance Mail Councils are designed to accomplish this goal.

Resources

Remittance Mail Web site

(<http://blue.usps.gov/remittanceemail/welcome.htm>) is a key internal communications vehicle of the Remittance Mail program.

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Exhibit 1



[Date]

Dear [customer]:

It is my privilege to invite you to become a member of the [district] Remittance Mail Council.

The purpose of the [district] Remittance Mail Council is to facilitate business and operation alignment between the Postal Service and our remittance mail customers. The council is comprised of local representatives from the remittance industry and the Postal Service who will meet regularly to discuss concerns, share information, and exchange ideas. These networking meetings will provide you and your organization the opportunity to develop close working relationships with Postal Service managers, other remittance mailers and processors, and experts in remittance mail operations.

The next meeting is scheduled on [day], [date], at [time] in [location]. This meeting will include [topic i.e., a presentation by [speaker's name/title and topic].

Your participation as a council member will strengthen our partnership toward providing optimum remittance mail service. Please let me know if you are interested in becoming a council member by date. I look forward to seeing you at the council meeting.

Sincerely,

[Signature]

[Typed name]

[Title]

United States Postal Service

[Street address]

[City/State/ZIP +4]