

Interim Measures of Success

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As described in chapter 3, Operation Bunts and Singles began in 1991, expanded throughout 1992, and by February 1993 included 32 joint union-management teams involved in a variety of human resource projects aimed to enhance the relationship between U S WEST and its customers, increase revenues, and improve employee satisfaction (see table 4-1). Most of these projects sought incremental improvements, or, in the idiom of baseball, bunts and singles. The Job Design Team had a broader mandate that was initially framed as an attempt to improve an entire job, that of the Customer Service Representative, and evolved to encompass all jobs along the customer interface. The Job Design Team project sought a home run for U S WEST.

This chapter begins by describing the business improvements in the Home and Personal Services Division (HPS) resulting from Operation Bunts and Singles. Next, the chapter describes the results of some of the individual process improvement teams, demonstrating how the contributions of these many incremental changes led to overall business improvements. The second half of the chapter describes the initial stages of implementation of the Job Design Team's vision for the far more complex task of redesigning customer contact jobs.

MEASURES OF SUCCESS IN OPERATION BUNTS AND SINGLES

Benefits to the Company

The improvements in HPS' performance in 1992 when compared with 1991, and the improvements to date in 1993, indicate that Operation Bunts and Singles has been a success as measured against the two goals HPS' top management established in the summer of 1991. These goals were to reduce the

*"... company union
partnerships in the
Home and Personal
Services Division have
produced tangible
results"*

Jane Evans
Vice President and General Manager
Home and Personal Services Division
U S WEST (Communications)

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Table 4-1. Operation Bunts and Singles Teams

Segment/Sponsor	Team name/Process
Cross-functional	CSM Service Improvement Project
EIQC	Job Design Process Management (PDC)
Movers and Shakers (new customers and residence changes)	Credit Limit Customer Assistance (CPE) Credit Culture Core Team Soft Dial Tone Customer Complaint Handling Master Card/VISA Knowing Customers Who Move Service Delivery Communicating Effectively
Core Services	Unbilled Toll (steady customers) Call Type Codes Credit Classifications English Language Bill Simple Bill/Bill Improvement Written Customer Communication final Bill/Outside Collection Agency Carrier Toll Adjustment Full Toll Denial Treatment Timing Voice Response Denials in Error Garbage Referrals Voice Link Customer Payment Options (PA) Residential Repair Call Handling/Billing
Big Spenders (heavy residential users- faxes, modems, etc.)	Network Marketing Frontline Communications Quality Call Back

growing volume of uncollectible bills and to improve availability to customers. By early 1993, HPS Vice President and General Manager Jane Evans was able to report to employees that their efforts, especially through the joint process teams, had reduced 1992 uncollectible by \$20 million compared with 1991. As for customer availabil-

ity, calls answered within 60 seconds increased by 10 percent from 1991 to 1992.

The downward trend in uncollectible continued in 1993 with a further 34 percent decline measured over the first five months of the year.¹ April 1993 uncollectible were the lowest recorded in any month for several years. Declines in uncollectible have a direct positive effects on profits. Customer availability will become more important as competition for residential customers grows; the upward trend seen in 1992 has continued in 1993.²

An indicator of employee satisfaction is turnover among Customer Service Representatives and Credit Consultants. Turnover among Credit Consultants dropped from 13.5 percent per year in 1991 to 11.8 percent in 1992. Among Customer Service Representatives turnover dropped from 20.1 percent per year in 1991 to 15.0 percent in 1992. For the first quarter of 1993, turnover in both groups of employees was the lowest yet seen, less than 1 percent.³ The reductions in turnover suggest that new customer contact workers no longer apply for immediate transfer out of what they until recently described as sweatshop conditions. However, the turnover data must be interpreted with caution because they may arise in part from the fact that downsizing has reduced opportunities to transfer into other job titles. Nevertheless, it seems likely that joint process improvements have also increased worker satisfaction. For example, the joint union-management Credit Culture Team's decision to create the Customer Credit Approval operation should have reduced workload and stress on CSRs by reducing pressure to sell to customers without regard to whether or not they were creditworthy.

¹ Telephone interview with Anna Gibson, Staff Manager, U S WEST Communications, Inc., June 28, 1993.

² Telephone interview with Rita Dozal, Director, Core Strategies, Home and Personal Services, U S WEST Communications, June 18, 1993.

³ Data provided by Tim Huerter, Manager, Human Resources, U S WEST Communications, April 27 and 29, 1993.

⁴ Based on interviews with various unionists in 1993.

Benefits to the Workers and Their Unions⁴

The foremost benefit to the workers was the job security they obtained through the written guarantee in the Memo of Understanding (see ch. 3 for more detail on the memo). The memo guaranteed workers their jobs through January 1994 and will likely be extended. Home and Personal Services is the only division in U S WEST Communications with such a guarantee. As noted in chapter 3, Jane Evans believed that unit costs could be reduced by improving work processes. HPS stabilized total employment levels in 1991. To improve availability to customers, HPS added 250 staff positions during 1992 and this higher staffing level will continue through 1993. In contrast, most other divisions of U S WEST Communications downsized during 1992. The added positions in HPS provided new jobs for some of the workers whose jobs in other divisions were eliminated. Joint process teams have also begun to create new work for HPS, enhancing long-term employment security. For example, the Twelve Thirty Team has created and is marketing a new U S WEST credit card.

Since the memo, no jobs have been downgraded and wages have been maintained. Indeed, the pay of Credit Consultants has been increased to equal that of Customer Service Representatives, a change that reflects new corporate recognition that collections are as important as sales,

Individual performance appraisals for nonsupervisory workers have been eliminated. The appraisals had caused many grievances because the workers felt they were unfair. Dissatisfaction with the performance appraisal system was one of the key issues that led to the unions' decision to mobilize against what they perceived as the sweatshop conditions in the business offices in late 1990 (see ch. 3). In its decision to eliminate the performance appraisal system, the company noted that most of the factors affecting worker

performance were under management's control, that the narrow performance measures used often led to unintended consequences (including poorer customer service), and that individual performance appraisals discouraged the kind of teamwork that the Job Design Team envisioned for future customer contact jobs.⁵

Customer contact jobs in HPS have become more interesting on several levels. For example, Credit Consultants no longer follow rigid guidelines and instead negotiate flexible schedules with customers who find themselves in a financial bind and are unable to make an on-time full payment of their telephone bill. For the majority of workers whose jobs have not yet been redesigned, simply the opportunity to participate in joint Bunts and Singles teams provides more variety to the work and increases the awareness that their opinions are taken seriously. The smaller group of customer contact workers whose jobs have changed more dramatically in a pilot project to implement the job design team's vision (discussed further below) are very enthusiastic about the changes in their jobs.

The mutual understanding that has grown between the unions and management and between workers and supervisors as a result of Operation Bunts and Singles has increased communication. This in turn has led to recognition of each other's needs and goals.

In HPS, the unions have become more proactive than reactive. Shop stewards spend less time on grievances and more on problem solving. Because the unions have changed from negative to positive forces, they are more attractive to workers. As a result, the unions find it easier to organize those workers who are not yet union members. Under a provision of the 1992 contract between CWA and U S WEST Communications, the company agreed to a provision expanding the scope of CWA'S bargaining unit. Workers in this

⁴W. Nelson, "Understanding the Abolishment of Annual Performance Appraisals: A Summary of Dr. W. Edwards Deming's Theories Applied to Annual Performance Appraisals at Home and Personal Services," unpublished paper by Home and Personal Services, U S WEST Communications, no date, p. 2.

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larger unit may choose to join CWA simply by signing a form authorizing automatic dues deduction from their paychecks. CWA'S district 7 has added 1,800 new members since this provision was included in the August 1992 contract.⁶ Among these new members are customer contact workers, who are enthusiastic about the union's role in redesigning their jobs.

A final benefit to the union is the increased activism and involvement of rank-and-file members in the union organization. By participating in joint teams, rank-and-file members have had an opportunity to exercise leadership skills, and these skills are benefiting the union as well as the company. To note just one example, Linda Armbruster, a union shop steward who was a chair of the joint union-management job design team, decided to run for a higher office in her local union in the summer of 1993.

THE TREATMENT TIMING PROJECT

The incremental role of each Bunt and Single or process improvement team is illustrated by the treatment timing project. The positive results achieved by this team are just one of many team success stories.⁷

The stimulus for the treatment timing project was management concern over rising numbers of denial notices⁸, which reached 565,000/month for a billing population of about 9 million. A joint process team noticed that the number of telephone service disconnects was much smaller, only 37,000/mont.h. The team hypothesized that the

interval between the pay by date notice⁹ and the denial notice was too short and that payments and denial notices were crossing in the mail.

HPS differentiates between risk and nonrisk customers, with the latter being those with good credit ratings who generally pay on time. While risk accounts trigger a denial notice after the pay by date is exceeded, nonrisk accounts may continue for several months without receiving a denial notice if the billable amount remains below the treatment threshold. These delinquent accounts reduce revenues to US WEST Communications. Therefore, besides testing the effect of a longer interval between the pay by date notice and the denial notice for risk accounts, the joint process team also attempted to prompt payment from nonrisk customers whose accounts were in arrears.

The treatment timing project was conducted first in the Central Region of U S WEST Communications. The interval between the pay by date and denial notices for risk customers was increased by nine days. Nonrisk customers with accounts in arrears by a month or more were sent reminder notices.

Results were as follows:

- Denial notices dropped by 30 percent for all accounts and by 44 percent for risk accounts.
- Denial referrals¹⁰ dropped 16 percent for all accounts and 30 percent for risk accounts.
- The percentage of calls from customers to protest denial notices because payment had

⁶Interview with Sue Pisha Vice president CWA District 7, April 15, 1993,

⁷Telephone interviews with Cheryl Turnbull, Methods Design Specialist U S WEST Communications, Inc. on April 6 and 8, 1993 and with Carol Palmer, Manager, U S WEST Communications, Inc. on July 7, 1993 were very helpful in understanding this project and documenting its results.

⁸A denial notice (DN) is a notice of intent to deny telephone service because of customer failure to pay for the service. Customers first receive a pay by date (PBD) notice which is printed on monthly telephone bills. Failure to meet the PBD triggers a DN to risk customers and may or may not trigger a DN for nonrisk customers depending on the size of the bill. (Risk or nonrisk status is determined by credit rating and/or history of telephone bill nonpayment.) Failure to pay or contact the telephone company by the date on the DN triggers a denial call, after which service is disconnected. The period of time for the PBD and the DN is set at the state level by the Public Utility Commission.

⁹See preceding footnote,

¹⁰A decimal referral is sent to the Business Office when the customer does not make payment by the date on the denial notice. This failure triggers a denial call to the customer. See footnote 8.

been mailed dropped from 40 percent of all calls to 21 percent.

- The unpaid balance on risk accounts dropped by 11 percent.¹¹
- The change in **timing** contributed to the substantial drop in uncollectible losses,
- The reminder notices had no effect on nonrisk customers whose accounts were in arrears.

The treatment **timing** project was a **success in several** respects. The reduction in denial notices, denial referrals, and incoming protest calls **saved time** and money. Time that customer **service** representatives had spent on incoming calls could be used for other purposes such as marketing and hence further revenue generation. Customer satisfaction also increased because fewer customers received denial notices after having paid their balance.

Because the treatment timing **team was one of 13 joint process teams working on** reducing uncollectible losses, its individual impact on the overall reduction described **above cannot be** determined. Other changes **that contributed to** reduction in uncollectible losses were implemented based primarily on the work of the credit culture team and also on the work of the denials in error team. These include:

- Giving CCS discretion to resolve customer payment problems. When a customer cannot pay a monthly bill in full, the credit consultant can now decide to accept two or three smaller payments rather than suspending service and thereby likely losing the entire payment as well as the customer.
- m Creation of CCA to better evaluate the credit history of new customers with a consequent decline in risk customers.

- Reduction in customers temporarily denied service, thereby saving the costs of cutting off service and then reinstating it¹².

The treatment timing project will be repeated in the Eastern Region in summer 1994 with an interval increase of seven rather than nine days. Additional study will occur in the Western Region beginning in December 1993.

PROGRESS IN JOB DESIGN

As described in chapter 3, the joint union-management Job Design Team developed a vision of the job of the new marketing worker rather than a single, rigid job description. Similarly, the team developed a flexible process of implementation that included presenting the vision to the company and the unions, developing methods to help local managers and unionists assess their readiness to implement the vision, and encouraging and helping local unionists and managers as they proceeded.

In December 1992 the JDT presented its vision to top management of U S WEST Communications. The presentation contributed to corporate plans for reorganization, including a new single unit for Mass Markets and Operations, that were announced in January 1993. As U S WEST Communications, Inc. President and CEO Gary Ames said, "One organization will now be responsible for every aspect of service to customers in our mass markets, from the moment they call our business offices to when their service is installed, upgraded, or needs repair."¹³

At a Phoenix meeting in early January, the JDT presented the vision to the EIQC and all local CWA and IBEW presidents. All responded favorably. Later that month, groups of JDT members

¹¹This result was unexpected. Since there were nine additional days in which to send payment, the unpaid balance was expected to increase.

¹²This change should also increase customer satisfaction and customer loyalty at a time when competition for residential customers is growing. As noted in chapter 3, the company estimates that it is much more expensive to win back a customer once lost than to continue to service that customer.

¹³"U S WEST Streamlines Local Operations, Places Sales and Service Operations Together," *Telecommunications Reports*, Jan. 4, 1993, vol. 59, no. 1, p. 8.

visited every CMC, RMC, and CCA in the 14-State region to present the vision and obtain feedback on it. Currently, the JDT is testing a local assessment tool to help local managers and unionists determine what they need to do to implement the vision.

Because of the expense involved in the ideal technical system envisioned by the JDT, HPS chose to begin with a prototype, called the Center for Customer Service, in Phoenix. While this pilot project is underway, implementation of the social (organizational) side of the vision is proceeding at varying rates throughout the 14-State region.

At this stage of the job redesign process there are no *overall measures* of its success or failure at US WEST. However, the Phoenix prototype indicates management commitment to preservation of jobs and their redesign so as to benefit both workers and the corporation. The very existence of a prototype is an interim measure of success that augurs positively for the job redesign effort.

The Phoenix Prototype-the Center for Customer Service

The Center for Customer Service (CCS) will initially serve 140,000 residences from six wire centers, selected to represent a statistically valid sample of customers. Included in this group will be big spenders (e.g., owners of faxes and PCs, etc.) as well as other residential customers. After two to three months, the CCS will begin to serve small businesses. U S WEST Communications expects increased competition for both types of customers in the coming years. The CCS will include both new technology and new work organization, following the Socio-Technical Systems principles that guided development of the vision.

On the **technology side**, the CCS will **test the** utility of providing soft dial tone to new residential customers. Soft dial tone allows people moving into new homes to call the U S WEST Communications Business Office directly **from** their home, receive a new telephone number, and activate service immediately.

Key features of the Center include the partnership between the company and the union, and implementation through a team that combines managers and unionists drawn from the three business units-HPS, Small Business Services (SBS), and Network & Technology Services (NTS)-that make up the new Mass Markets and Operations organization. The results of the prototype will be "a new model of mass markets service delivery processes in U S WEST."¹⁴ Tom Bystrzycki, executive vice president of Mass Markets and Operations, has described the CCS as a "service improvement 'laboratory' " for exploration of new ways to provide and repair service to residential and small business customers.¹⁵ In an experimental design, Corporate Service Measurement (CSM) results from surveys of CCS customers will be compared with survey outcomes from a matched sample of customers served by the current technology and form of work organization.

The CCS opened on July 14, 1993.¹⁶ Staff were assembled a month beforehand and included two manager-coaches and 56 workers from five occupational groups: Customer Service Representatives, Credit Consultants, Maintenance Administrators, Translation Specialists, and Plant Line Assigners. They received technical and customer contact skills training and participated in team building exercises. For the first time, customer contact workers sat near repair and technical workers. Improved communication among them should improve customer service.

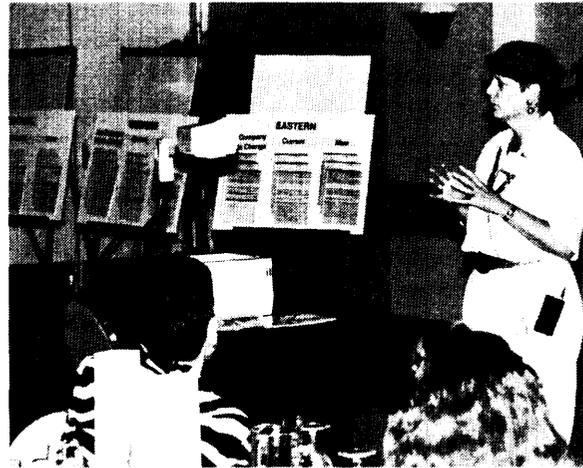
¹⁴ "Bystrzycki Announces Mass Markets Service-Improvement Laboratory," Issues *Infonet*, no. 687, Mar. 15, 1993.

¹⁵ "Bystrzycki Announces Mass Markets Service-Improvement Laboratory," *Issues in/*oner, no. 687, Mar. 15, 1993.

¹⁶ The descriptions of the Center's opening and potential measures were obtained in telephone interviews with Becky Hansen, Director, Mass Markets, U S WEST Communications, Inc., April 7, June 7, and July 26, 1993.

In response to interviews conducted by Job Design Team members, workers involved in the Center for Customer Service expressed enthusiasm about working closely with workers in other job titles and performing a greater variety of tasks. To quote one worker, "This is the first time in years that I've wanted to come to work." There is broad agreement among this group that working more closely together is a positive step. Despite concerns of the Job Design Team that increasing the responsibilities of the Customer Service Representatives might threaten technical workers, the technical workers involved in the pilot project are enthusiastic about the changes. As one repair worker said, "I always wondered what the Business Office did."¹⁷ The Center's opening was marked by enthusiasm and cooperation among its staff and a strong commitment to improving customer service.

Evaluation includes real-time data collection that will enable rapid, even daily, changes. Outcome measures will likely include indicators of change in revenues, customer satisfaction, and employee satisfaction, as well as process measures. Examples of customer satisfaction measures might be: What proportion of calls are answered within three rings? How frequently do service people arrive on schedule? What percent of the time do customers receive the day and time they prefer for service? How often is a repair completed within the interval that the customer was told would be required? What is the average total interval between a breakdown in service and return to full operational status? Employee satisfaction measures may include turnover rates, absenteeism, and opinion surveys. The process measures will evaluate the success of the Customer Service Center by comparing it with the JDT's vision; examples are indicators of waste or breakdown. The results of this prototype implementation will be used to assist in implementation



Becky Hansen, Director, Mass Markets, and lead manager of the new Center for Customer Service, in discussion with union representatives at a union-Management sharing rally.

of the JDT's vision throughout U S WEST over the next three to five years.

Related Activities

HPS and its union partners are not waiting for the results of the prototype in Phoenix to implement the JDT's vision. local managers and unionists throughout the 14-State region, moving at varying rates of speed, are beginning to reorganize work (moving toward the social optimum in the vision). Perhaps the easiest part of the work reorganization is cross-training and co-locating sales and collections workers (CSRS and CCS). For example, in Des Moines, the company and union plan to co-locate workers now separated in the CMC, RMC, and CVC (the Credit Verification Center, which is roughly equivalent to the CCA) in September 1993, and cross-training is underway. In July 1993, about 15 of the 42 CCS in the Des Moines RMC had completed training in service change orders. Because they were able to help CSRS with those calls, RMC availability (measured as the percent of calls

¹⁷Quotations were provided by Joyce Trimble, Credit Consultant and CWA member of the JDT, based on interviews in Phoenix, Ariz., June 1993.

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answered in 60 seconds or less) had improved from less than 10 percent to 40 percent.¹⁸ In Denver, CSRS and CCS are now sitting together, forming a single customer service team, and cross-training is underway. In Phoenix, although only a few CSRS and CCS are involved in the Center for Customer Service prototype, all are being cross-trained to perform each others' work. Many of the workers in the Phoenix Customer Credit Authorization Center already know the CSR and CC jobs, because they were in those job titles before the CCA was created. And, by February 1993, about 35 percent of the CSRS working in the RMC had already been trained to do collections work.

To help local areas move beyond cross-training, members of the JDT developed an assessment tool in April 1993 and tested it on workers involved in the Phoenix prototype in June 1993. This tool, which will soon be made available throughout the 14-State region, will allow local managers and unions to assess their readiness to reorganize work, and help them identify steps toward reorganization.

The next step will be the creation of joint union-management local assessment teams, which will administer the assessment tool. Each team will include a manager and a unionist from each of the three divisions (HPS, NTS, SBS), a facilitator, and a member of the JDT to act as a resource.

SUSTAINABILITY AND GROWTH

The Bunts and Singles process has taken root throughout HPS, and both unions and management are committed to sustaining and developing it. However, HPS is now part of Mass Markets and Operations. Transferring the joint success to

the larger organization, and to U S WEST, Inc. as a whole, will not be easy. The extent of transfer will depend on the labor-management relationships in various divisions, and at the corporate level, as well as in HPS.¹⁹

Recent experience in developing the Center for Customer Service in Phoenix provides a microcosm of the issues being faced at a higher level as the three market units (HPS, SBS, and NTS) are merged into one organization. When members of the Job Design Team tested their local assessment tool on the Phoenix workers, NTS managers at first refused to let their employees participate. (They later reversed this decision.) Another difficult decision involved the degree to which the various types of workers in the CCS would be cross-trained to perform broader work. Throughout U S WEST Communications, workers who want to be transferred to other job titles are required to pass tests prior to being selected and trained for new work. Although the unions support cross-training, they believe that the company should remove the obstacle of these tests; in the CCS, workers would have to pass four or five separate tests in order to be trained for each of the jobs included in the work unit.

As a result, in the summer of 1993, CCS employees were located close to each other and were *observing* each others' work. They had been trained in communications skills and team-building skills, but they had not been trained to *perform* each others' work.

The most difficult issue for the future of labor-management cooperation at US WEST Communications, Inc. could be implementation of the company's plans for re-engineering. Although the JDT's vision of a work unit employing broadly skilled workers could provide the frame-

¹⁸Telephone interview with Joyce Trirnble, Credit Consultant, U S WEST Communications, Inc., July 8, 1993.

¹⁹ 1992 contract negotiations, US WEST Communications and CWA agreed to dismantle a joint union-management Employee Involvement Quality Department called for in their 1989 contract. In place of this centralized department the new contract called for creation of joint union-management employee involvement oversight boards in each individual business unit *and at the corporate level*, a union-management Strategic Executive Council. & a result of these contractual changes, as well as the differing personalities and needs of managers and unionists in the various divisions of U S WEST Inc., labor-management relationships vary across divisions and market units.

work for re-engineering, the JDT's vision also included employment security and maintaining all existing business offices. In contrast, the company's re-engineering plans tentatively include creation of metacenters in the larger cities, downsizing the workforce, and closing rural business and repair offices.²⁰ Broadly trained workers in these centers would talk to customers and immediately respond by providing dial tone, assigning a telephone number and the associated pair of cables coming into the home, testing the system, dispatching a technician if needed, and entering computer changes needed for voice mail and other enhanced services. While a limited number of workers at the metacenters would enjoy these new, more satisfying jobs, hundreds of others in smaller cities and rural areas would either be laid off or face a choice between early retirement or moving to a city.

Although this issue has not yet been resolved, it appears unlikely that such a radical centralization and downsizing will take place. The joint success in HPS is making an impression on managers in the larger organization, and they are increasingly interested in creating a partnership with the unions. Alan Wright, who is in charge of re-engineering for Mass Markets and Operations, became a member of the HPS Employee Involvement Quality Council (EIQC) in early 1993, and began to see the benefits of working closely with the unions.

U S WEST Communications had planned to announce creation of the metacenters in July 1993. That announcement was postponed to allow more time for discussions with the union. That month, the company and unions agreed to develop an overall process to integrate the re-engineering plans with implementation of the JDT's vision. As an initial step in developing this process, they agreed to a meeting of the three joint union-management employee involvement over-

sight boards in HPS, NT'S, and SBS. They also agreed that there would be no office closings until mid-1995, and that they would work together to develop outplacement and financial assistance for rural workers who would be affected. Finally, they informally agreed that the new work required to lay a broadband transmission network throughout the 14-State region would be union work, creating a new source of employment for rural workers who may be affected by the centralization plans.

If these tentative plans bear fruit, labor-management cooperation promises to spread throughout the Mass Markets and Operations organization, and possibly throughout U S WEST Communications.

At the corporate level, U S WEST, Inc.'s Board of Directors and senior management are committed to a corporate strategy based on quality management that seeks to involve workers, with or without the unions, in increasing productivity. For example, in early 1993, CEO Dick McCormick hosted a "Connecting Day," at which 28 teams, some of them joint union-management teams (including three HPS process improvement teams and the HPS EIQC), some not, were honored for their contributions to increased customer satisfaction, loyalty, and employee commitment to the business.²¹ This commitment to quality and worker involvement appears to conflict with the corporate goal to "narrow the cost-of-service disadvantage with current and potential competitors . . . through reductions in staffing."²² However, if the company agrees to move surplus workers from its traditional telephone business into the jobs that will be created with construction of its new broadband network and other new ventures, the conflict may disappear. At present, this mutually beneficial outcome seems likely.

²⁰ This paragraph is based on a telephone interview with Reed Roberts, President, CWA Local 7719, June 17, 1993.

²¹ S. Nance, "A Gathering of Heroes—An Atmosphere Of Joy," U.S. *WEST Today*, vol. 6, no. 4 (Mar. 8, 1993), pp. 4-5.

²² U.S. *WEST Annual Report*, 1992, p. 14.