Customer Service

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A Better Student Loan Experience.
collegeave.com
Agenda

- Why Great Customer Service is Necessary
- Types of Customers
- 10 Strategies for Dealing with Customers
- Tips and Techniques
- Situations-Financial Aid
- Example of Outstanding Customer Service
- Conclusion
Why Great Customer Service is Necessary
What is Customer Service?

Assistance and advice provided to those who buy or use a company’s product or services.

- Questions, concerns, or complaints
- Before, during and after service

A broad concept.

- Customer support and care
- Customer satisfaction top priority

Many options for success.

- In Person
- Phone
- Email
- Zoom
- Chat and Chatbots
- FAQ page
Remember…

Great customer service is in the eye of the beholder.
Why Great Customer Service is Important

- Student retention is key!
- Reinforces positive university reputation
- Promotes new students coming to your campus
Why Great Customer Service is Important

- Supports tuition revenue and fees.
- Promotes alumni giving
- Promotes future generations’ attendance
Remember…

Great customer service is the responsibility of ABSOLUTELY EVERYONE.
Types of Customers (Students)
8 Types of Customers

1. Impatient
2. Indecisive
3. Angry
4. Demanding
5. Vague
6. Demanding a refund
7. Unhappy
8. THE HAPPY customer
10 Strategies for Dealing with Customers
Strategies for dealing with your students

1. Listen
2. Build rapport through empathy
3. Lower your voice
4. Respond as if all your students are watching
5. Recognize a difficult situation and adjust
Strategies for dealing with your students

6. Stay calm

7. Don’t take it personally

8. Remember you’re interacting with a human

9. If you promise a callback, call back!

10. Summarize next steps
In person, phone, zoom, or chat…

Across all delivery methods …

- Smile
- Listen or read intently, and repeat question/concern for understanding
- Mitigate disruptions/distractions
- Be professional and positive
- Stay focused
- Be respectful
- Apologize, as necessary
- Take ownership and follow through
- Take time to give correct answer
- Provide your contact information, as appropriate
- Say or write “Thank you”!
In person, phone, zoom, or chat…

In person …

- Provide confidentiality – remove paperwork
- Close door for privacy or go to a private location
- Student’s information at hand
- Control the conversation
- Welcoming office decor
In person, phone, zoom, or chat…

Over the phone …

- Stay focused and free of distractions
- Control the conversation
- Offer an in-person follow up
In person, phone, zoom, or chat…

Through Zoom …

- Camera is On (even if theirs is not)
- Good lighting on your face
- Share screen if needed
- Control the conversation
- Recognize body language
In person, phone, zoom, or chat…

In Chat …

► Read chat thoroughly

► Use proper language – don’t use acronyms/slang

► Stay focused

► Confirm question has been resolved
Customer service processes

- Customer Service Excellence Rewards
- Training Program
- Documented Procedures
- Mentorship Programs for New Staff
- Quality Control Measure (Dedicated Specialist)
Situations
Situations - share your experiences

- In-person
- Phone
- Zoom
- Chat
# Evaluate your success

**CASL Chat Transcript with Financial Aid**

<table>
<thead>
<tr>
<th>Time</th>
<th>Message</th>
</tr>
</thead>
<tbody>
<tr>
<td>04:58:19</td>
<td>*** Sharon joined the chat ***</td>
</tr>
<tr>
<td>04:58:19</td>
<td>Sharon</td>
</tr>
<tr>
<td></td>
<td>Good Afternoon,</td>
</tr>
<tr>
<td></td>
<td>I need to increase a loan that we partial refunded.</td>
</tr>
<tr>
<td>04:58:40</td>
<td>*** Robert joined the chat ***</td>
</tr>
<tr>
<td>04:59:50</td>
<td>Robert</td>
</tr>
<tr>
<td></td>
<td>Hello, thank you for chatting with College Ave.</td>
</tr>
<tr>
<td>05:00:15</td>
<td>Robert</td>
</tr>
<tr>
<td></td>
<td>Can you please verify your school code?</td>
</tr>
<tr>
<td>05:00:27</td>
<td>Sharon</td>
</tr>
<tr>
<td></td>
<td>12345678.</td>
</tr>
<tr>
<td>05:01:23</td>
<td>Robert</td>
</tr>
<tr>
<td></td>
<td>Thank You. Can you also please verify the student's name and the last</td>
</tr>
<tr>
<td></td>
<td>four digits of their social security number?</td>
</tr>
<tr>
<td>05:01:49</td>
<td>Sharon</td>
</tr>
<tr>
<td></td>
<td>John Doe (1234)</td>
</tr>
<tr>
<td>05:02:20</td>
<td>Robert</td>
</tr>
<tr>
<td></td>
<td>Thank You.</td>
</tr>
</tbody>
</table>
CASL Chat (cont.)

(05:02:47) Robert
What amount would you like to increase this loan to?

(05:02:57) Sharon
I did a refund for $17683.00

(05:03:28) Robert
Would you like the full amount reissued to the school?

(05:04:18) Sharon
yes the $17683 with a disbursement date of 8/10/2022

(05:04:42) Sharon
$35366 total loan amount

(05:06:01) Robert
Thank You. I have submitted this request, it will be completed within 24-48 business hours.

(05:06:21) Sharon
thank you very much

(05:06:35) Robert
Is there anything else I can assist you with today?

(05:07:07) Sharon
No not right now. Have a wonderful day

(05:07:23) Robert
Thanks for trusting College Ave. We hope you have a wonderful day as well!

(05:07:40) Sharon
thank you

(05:07:47) *** Sharon has rated the chat Good ***

(05:08:40) *** Sharon left the chat ***
The Financial Aid Office

Confidential and trusted Advisor

Nurtures and Cares

Helps to secure and retain students
Outstanding Customer Service Example
Example of Outstanding Customer Service
Customer Service Observations

- We arrived in Tanzania not knowing the language, country, and culture

- Educated us on how to navigate in their culture/country
  - Simple courtesies—taught us helpful words

- Absolutely everyone we met was:
  - Always kind
  - Always smiling
  - Patient, patient, patient…
Customer Service Observations

- Explained the guidelines and rules
- No problem was ever too big to be resolved. “Hakuna Matata” (no worries).
- What sometimes appeared as chaotic was well organized behind the scene
- Always knew who we were, where we came from, and where we were going
- Always made us feel as if we were the only people they were meeting or talking with
Conclusion
Conclusion

- Hone customer service and conflict skills
  - Takes time and practice
  - Take time to listen
  - Each student is different

- Role play customer service situations

- Remember student’s viewpoint and empathize

- Difficult situations are unavoidable

- Student assistance is your goal

- Opportunity to gain their trust
Conclusion

YOU are a trusted advisor and instrumental in the student’s growth and success!
Resources

https://heag.us/7-principles-customer-service/

https://blog.hubspot.com/service/customer-service-role-play

https://study.com/learn/lesson/what-is-customer-service.html


MASFAA website (for members): Customer Service-Supporting Students Holistically
If you have a question, suggestion, or just need a little more detail, you can contact us using any of the options below.

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**Campus/School Services**
844-422-7501
schools@collegeave.com

**Borrower Services**
844-422-7502
studentloans@collegeave.com

**For Help Servicing or Repaying a Loan**
844-803-0736
collegeaveservicing.com

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