



# *Customer Service*

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*A Better Student Loan Experience.*  
[collegeave.com](https://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.



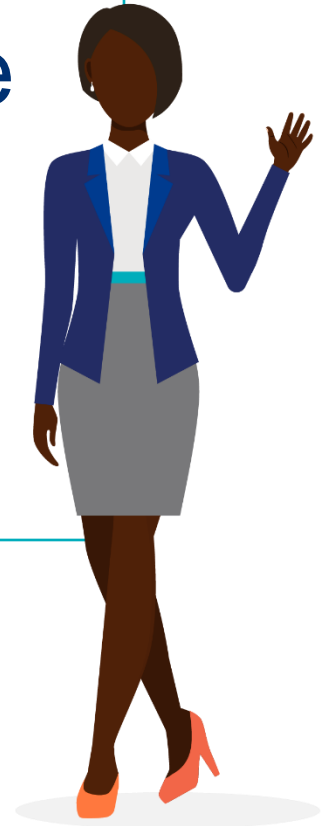
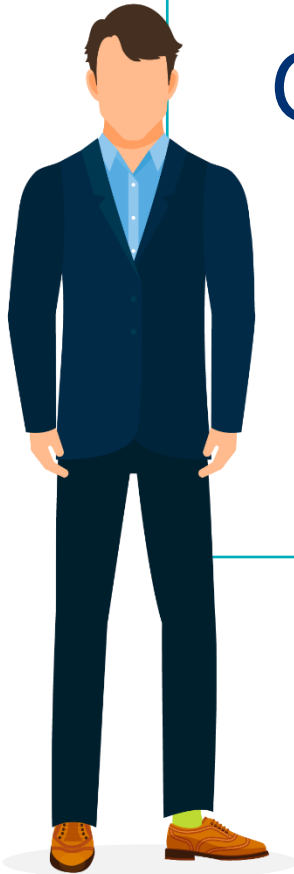
Promotes alumni giving



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

# Tips and Techniques

# 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 ...

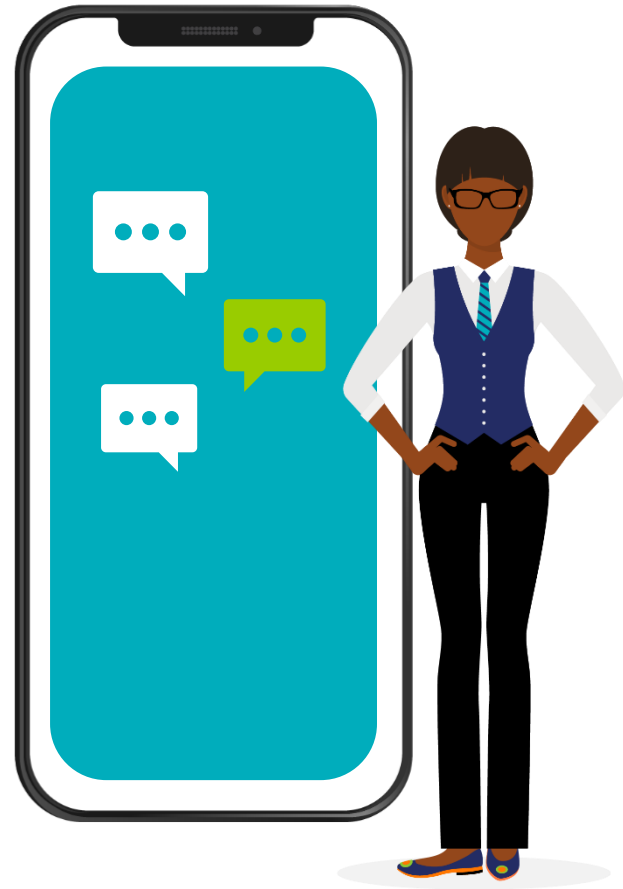
- ▶ Camera is On (even if theirs is not)
- ▶ Good lighting on your face
- ▶ Share screen if needed
- ▶ Control the conversation
- ▶ Recognize body language



# 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



# Situations

# Situations-share your experiences



**In-person**



**Phone**



**Zoom**



**Chat**

# Evaluate your success

## CASL Chat Transcript with Financial Aid

Chat started on 26 May 2022, 04:58 PM (GMT+0)

(04:58:19) \*\*\* Sharon joined the chat \*\*\*

(04:58:19) Sharon

Good Afternoon,

I need to increase a loan that we partial refunded.

(04:58:40) \*\*\* Robert joined the chat \*\*\*

(04:59:50) Robert

Hello, thank you for chatting with College Ave.

(05:00:15) Robert

Can you please verify your school code?

(05:00:27) Sharon

12345678.

(05:01:23) Robert

Thank You. Can you also please verify the student's name and the last four digits of their social security number?

(05:01:49) Sharon

John Doe (1234)

(05:02:20) Robert

Thank You.

## 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

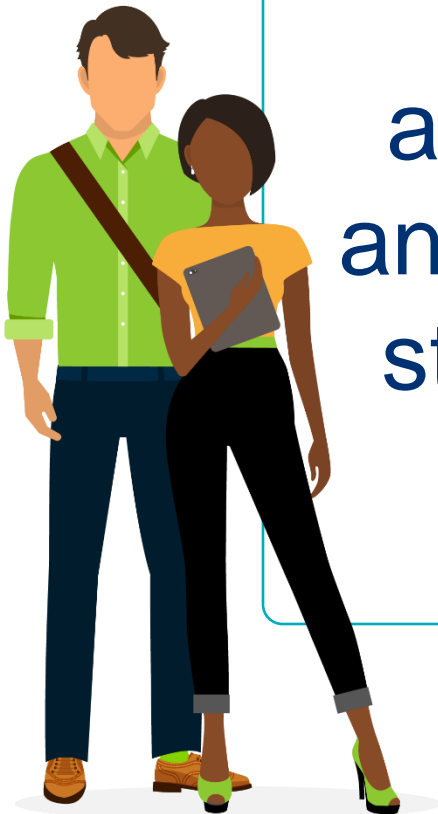
# Conclusion

- ▶ 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>

<https://www.insidehighered.com/news/2022/08/26/8-ways-improve-student-interactions-campus-offices>

MASFAA website (for members): Customer Service-Supporting Students Holistically

# College Ave Contact Information

Thank You!

If you have a question, suggestion, or just need a little more detail, you can contact us using any of the options below.



**Deb Gossman**

317-626-5991

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**Campus/School Services**

844-422-7501

[schools@collegeave.com](mailto:schools@collegeave.com)

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**Borrower Services**

844-422-7502

[studentloans@collegeave.com](mailto:studentloans@collegeave.com)

**For Help Servicing or Repaying a Loan**

844-803-0736

[collegeaveservicing.com](http://collegeaveservicing.com)

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