



Improving Customer Service *(And your life!)*



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Want to...

- Win friends?
- Influence people?
- Reduce stress?
- Have fun at work?
- Be considered a valuable partner by students, faculty, staff, and co-workers?



Focus on three groups

- Those in your Financial Aid Office (FAO)
- Students and their families
- Other departments at your institution



Focus on two words

- Partner
- Personally



Two words: Partner

- Do things *with* people, not *to* them
 - solve problems
 - collaborate
 - celebrate successes
 - commiserate about failures
- Be known as a real human being vs. an inflexible bureaucrat



Two words: Personally

- Communicate in person vs. e-mail or “snail mail”
- Customize your approach to the individual
- Be fully present with people
- Again...Be known as a real human being



Focus on one concept

You will be successful ...
... when you help *others* to be!





Partnering personally at your FAO

- Model world-class service yourself
 - the way you treat your employees is the way they treat your customers
 - turn the organizational pyramid upside down





Modeling world-class service

- How messages to your employees about **caring** get translated to customers:
 - “I care about you; I want you to have a good experience working in our office.”
- This message gets translated as ...
 - “I care about you; I want you to have a good experience with our office and our institution.”



Modeling world-class service

- How messages to your employees about **competence** and **confidence** get translated to customers:
 - “I want to help you understand these regulations and give you the time to build important skills, so you’ll feel confident and be successful at your job.”
 - “I can explain what you need to do, so you’ll be successful in your academic career.”



Modeling world-class service

- How messages to your employees about **commitment to co-workers** get translated to customers:
 - “We have a close-knit team; we’re good friends.”
 - “I’m fully committed to my team. I’m happy to help my co-workers, and they help me too.”



Modeling world-class service

- How messages to your employees about **trust** and **authority** get translated to customers:
 - “Because I trust you to do a good job, I can give you the authority to make decisions and take action.”
 - “Because I have the authority to act, I can help you effectively and efficiently.”



Modeling world-class service

- How messages to your employees about **innovation** get translated to customers:
 - “As a ‘frontline’ employee, you have good ideas to solve problems and make improvements.”
 - “My manager feels I’m experienced, creative, and resourceful. I’m eager to brainstorm solutions with you and to improve our service.”



Modeling world-class service

- How messages to your employees about **roles** and **responsibilities** get translated to customers:
 - “I want to be sure you clearly understand your and your co-workers’ roles and responsibilities.”
 - “Because we understand who does what, you can be sure that what you need from us won’t ‘fall through the cracks’.”



Modeling world-class service

- How messages to your employees about **personality styles** get translated to customers:
 - “Because we understand each other’s personality styles, we can appreciate our strengths and can bring out the best in each other.”
 - “Because I understand your personality style, I can communicate effectively with you and we can partner up and both be successful.”



Modeling world-class service

- How messages to your employees about **having fun** get translated to customers:
 - “We believe in having fun as a team, and enjoy occasional breaks to celebrate or let off steam.”
 - “I can relax and partner personally with you because I’m not too tired or stressed out to focus on your needs.”



Modeling world-class service

- How messages to your employees about **recognition** get translated to customers:
 - “Everyone is unique; we want to recognize and reward you in the way that you want to be rewarded.”
 - “I feel motivated to do my best work every day because I feel appreciated and I’m recognized for my contributions in a meaningful way.”



Partnering personally at your FAO

- Bottom line:
 - To be successful, enable your reports or co-workers to be successful!



Benefits of partnering personally within your office

- Employees:
 - feel competent and confident
 - understand their contribution and feel valued
 - feel loyal to the FAO and more likely to continue working there
 - have the skills and knowledge to make their work a career



Partnering personally with external customers

- To ensure great service delivery, everyone in your office must be ...
 - willing
 - able...to deliver it.



Partnering personally with external customers

- Willingness
 - reinforce customer-focused attitudes and behaviors
- Ability
 - provide training and cross-training
 - be sure policies are customer-friendly



Partnering personally with external customers

- Look for opportunities to connect with students
 - increase involvement and visibility with student groups
 - chili cook-off and other campus events
 - make personal connections, one-on-one
 - be a coach vs. a judge or jury
 - make someone's day



Partnering personally with external customers

- Bottom line:
 - To be successful, enable students to be successful!



Benefits of partnering personally with external customers

- Students:
 - feel they have a caring partner...a friend ...in the FAO
 - understand what's expected of them, but aren't afraid to ask questions or ask for help
 - hopefully make wise choices, earn their degrees, and pay back their loans



Questions





Partnering personally with internal customers

- Why are FAOs “under-appreciated”?
- They are perceived as making more work for other departments
 - business office
 - athletics
 - academics (professors)
 - etc!



Partnering personally with internal customers

- How can you turn adversaries into advocates, and challengers into champions?
 - resolve conflicts
 - build personal relationships
 - collaborate on improvements you can make
 - prove yourself worthy of their confidence and trust



Resolving conflicts

- To improve relationship, be proactive
- Use conflict management techniques
 - customize your communication style
 - cite the cost of continuing conflict and the benefits of resolving it
 - ask to understand his/her point of view
 - explain yours
 - brainstorm ways to overcome the conflict



Building personal relationships

- Communicate in person
 - eye-to-eye, not via phone, memo, or e-mail
 - explain *why* you need what you need from them
 - recognize their strengths, abilities, and experience
 - adapt to their communication style



Building personal relationships

- Learn who they are and what they do
 - host get-acquainted or appreciation events
 - staffs of many departments, not just business office

*“Seek first to understand.”
– Stephen Covey*



Building personal relationships

- Take time for the personal, creative touch
 - make their (very own) day
 - do “random acts” to avoid apathy and/or a feeling of entitlement



Collaborating on improvements

- Focus on ...
 - how can we communicate better
 - how can we improve service
 - (be prepared with the WIIFMs)
 - in what ways can we collaborate
 - combined staff training
 - joint presentations to students (“Your Money Team”)
 - working *together* at Financial Registration day



Proving yourself worthy of their trust and confidence

- People will have confidence in you and will trust you based on how...
 - willing (their perception of your attitude)
 - able (their perception of your knowledge)
 - ... you seem to be.



Proving your willingness

- Put your ego aside to help them succeed
 - be approachable
 - be known as a “can-do” person
 - be known as someone who gets things done



Proving your willingness

- Meanwhile, do not...
 - play “Gotcha!”
 - whine
 - catastrophize
 - leap into every battle
 - be thin-skinned



Proving your ability

- Become known as the “go to” person
 - join and be active in your professional association
 - read professional publications (print & online)
 - attend conferences, learn, then present
 - exchange info with peers at similar institutions
 - be a continual learner



In short....

- Be energetic and committed to your goal of turning your adversaries into advocates
 - pretend you're running for office
 - act extroverted even if or when you don't feel like it



Partnering personally with internal customers

- Bottom line:
 - To be successful, enable your colleagues in other departments to be successful.



Benefits of partnering personally with internal customers

- FAO gets reputation for great, helpful staff
 - full *partners* in mutual success
 - friendly, knowledgeable people with a *personal* approach
- You've turned adversaries into advocates, challengers into champions



Improving customer service does improve your life

- That's because as you do so, you will:
 - win friends
 - influence people
 - reduce stress
 - have fun at work
 - be considered a valuable partner by students, faculty, staff, and co-workers



Questions





More information

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