

# Customer Service:

WHAT YOU CAN, CAN'T, SHOULD  
AND SHOULDN'T DO OR SAY?



# INTRODUCTION:

Who died and made me  
a customer service  
expert?



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# 1. HOW'S YOUR CUSTOMER SERVICE?

- A. Working in financial aid would be so much easier if we didn't have to deal with students or parents!
- B. I can only please one person per day, unfortunately, today is not your day! Tomorrow doesn't look good either!
- C. I love what I do, except for the students.
- D. If they "pay my check," then I demand a raise!
- E. Students are not always right, but treat them like they are!
- F. Put yourself in the student's or parent's shoes.
- G. Students/parents are not the interruption of our work, they are the reason for our work.
- H. Without students, we have no job!



# 2. UNDERGRADUATE

## Basic Customer Service:

1. Say “Hello!” - Hi! Good morning! Good afternoon! What’s up? What’s new? SOMETHING...ANYTHING....POSITIVE!
2. Ask “How are you?” -How can I help you? What seems to be the problem? Do you have any other questions? Do you need anything else?
3. Bid “Good-bye!” -Have a great day! Take care! If you need anything else, let me know? Here’s my business card! You can call or email me anytime! Thanks for stopping by!



# 3. GRADUATE

## Advanced Customer Service

# Greet:

- Convey warmth, friendliness, genuine concern
- Smile, look happy to see them...if need be, PRETEND!
- Maintain eye contact
- Shake hands
- Introduce yourself
- Ask their name and use it often



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# Respond:

- Ask the, “How can I help you today?”
- Look them in the eye
- Let them know that you hear what they are saying
- Nod, say: “Yes!” “Amen!” “Alleluia!”
- Be sympathetic
- Be empathetic
- Be genuine
- Don’t argue or become defensive



# Actively listen:

- Use open facial gestures
- Eye contact -nod
- Say: “Yes,” or “Amen” or “Alleluia”
- Don’t interrupt or cut them off
- Don’t try to outtalk or out yell
- Don’t argue
- Don’t become defensive
- Remain cool and calm
- Focus on the issue not the person



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# Demonstrate:

- Use frequent eye contact.
- Communicate respectfully, it is not what you say but HOW you say it
- Summarize the student's questions and/or concerns.
- Ask probing questions
- Get specifics
- Ask for examples
- Although not always right, give them the impression of their infallibility



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# Understand:

- Try to understand and hear their concerns
- Use empathetic words, nod knowingly
- Remain calm
- Use a deliberate tone of voice
- Ask probing questions
- Paraphrase their words or issue
- Summarize their problem or concerns



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# Answer:

- Answer their questions CORRECTLY
- If you don't know the answer, find out...NEVER guess
- Being nice is no excuse for being wrong!
- Refer them to another, specific person or office
- Give specific reasons that they understand
- Be confident in your response
- Believe in what you say
- If possible, site the relevant regulations or policies
- If possible, explain the rationale behind it
- Never just blame it on someone else.



# Take it to the next step:

- Never-It's not my problem, my job, my responsibility
- Never just send them to another office
- Tell them WHO they need to see
- If possible, call that person
- Better yet, walk them to that person
- Introduce them, summarize the issue



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# Educate:

- Make a smooth, professional transition
- Give someone the heads-up
- Transfer calls correctly
- Provide all of the necessary background info
- Ask them to follow up with you
- Better yet, guarantee their satisfaction, follow up with them



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# 4. PHD

## Summa Cum Laude Customer Service

(Communication tips for DIFFICULT students/parents)

- Recalibrate the conversation pace-let the person vent
- Identify the real problem, what's really bothering them
- Don't take it personally-You are the solution not the problem
- Work within realistic boundaries-Don't BS
- If necessary, temporarily disconnect
- Show internal support



- Take a breather
- Shadow colleagues
- Maintain perspective
- If necessary, work the ladder



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# 5. EMAIL ETIQUETTE

- Write a clear, detailed subject line
- Purpose of the email? -to answer, inform, persuade or request information?
- Know your reader-Is it relevant?
- Specify the response-What do they want? Why did I get this? How is this relevant to me?
- Be careful-Reply all?
- Acknowledge the email-Always reply
- Organize the content-Be clear



# MORE EMAIL ETIQUETTE

- Be respectful-Use proper name and use their name
- Be concise- KISS!
- Improve readability –label, highlight, use bullets, etc.
- Review and edit- ALWAYS proofread before sending
- Business emails-Positive and professional
- AVOID ALL CAPS and !!!!!!!!!!!
- Avoid jokes and sarcasm
- Don't write anything that you don't want read in a deposition
- Avoid emoticons and unnecessary graphics





QUESTIONS?  
COMMENTS?  
OBSERVATIONS?  
THOUGHTS?

CRITICISMS?

