Customer Service:
WHAT YOU CAN, CAN’T, SHOULD AND SHOULDN’T DO OR SAY?
INTRODUCTION: Who died and made me a customer service expert?
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
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
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.
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
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
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
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
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?