FASFAA
Florida Association of Student Financial Aid Administrators

Strategies for Exemplary Customer Service In the Financial Aid Office

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How are we different?

We traditionally think about customer service through the lens of a business with customers purchasing products and services:

- Transactional businesses (retail, fast-food)
- Long-term relationship-oriented businesses

What similarities and differences exist between customer service in a financial aid office and more traditional business environments?

How are we different?

- Compliance Focus
- Limited Solutions
- Captive Clients (Students)
- Large Impact

What does this mean?

HOW we provide service matters!

We must be thoughtful in the techniques we use, processes we create, and ways we communicate.

Agenda

- Communicating with Students
- Knowledge Management
- Continuous Improvement

Communicating with Students

What we say and how we say it matters!

Positive reframing
Expectation Setting
De-escalation Techniques

Positive Reframing

Is not…

saying bad news in a nice way

being overly optimistic about a situation

a manipulation

Positive Reframing

Is…

Removing “no” words when possible

Focusing on action needed to get a result

Positive Reframing

"You can't get your financial aid offer until you complete verification."

Vs.

"Once verification is completed, we can provide your financial aid offer. What help do you need with verification?"

Expectation Setting

Service Level Agreements (SLA): Establish clear times for responses, processing tasks, and other items that must be completed.

Always provide the SLA. Do not imply something might be done faster.

“Under promise, over deliver”

Expectation Setting

Does your department have clear Service Level Agreements? If so, how are they developed?

De-Escalation Techniques

Listen and Allow Student to Speak
Do not try to rationalize
Clear and Direct Communication
Avoid providing choices
Reduce stimuli

De-Escalation Techniques

- We do not have to tolerate abuse.
- Know your department's procedures for those being abusive.

Knowledge Management

Having accurate information that can be easily shared is key to providing excellent service!

Resource Focused Culture
Source of Truth

Source of Truth

Where does the most up to date and accurate information live?

Website
Chatbot
Knowledge Base

Resource Focused Culture

Team members providing service should always consult a resource (source of truth) when providing information.

Resources that are public facing can be shared with students.

Creating Resources

- Get suggestions from team members about needed resources.
- Review data to understand resource gaps
- Use AI tools to generate drafts and improve clarity.

Knowledge Management

How does your department manage knowledge to ensure accurate information is available?

Continuous Improvement

Collecting data and feedback is critical to customer service!

Collecting Data and Feedback
Using Data for Continuous Improvement.

Collecting Data and Feedback

How does your department collect data about the service provided to students?

Collecting Data and Feedback

Requires technology
What is relevant?
Keep it simple

Customer Effort Score

A customer service metric that evaluates how much effort a customer must exert to get an issue resolved.

Describe a time you had a high-effort customer experience. What about the experience made it high-effort?

Customer Effort Score

To what extent do you agree or disagree with the following statement: “The Financial Aid Office made it easy for me to handle my issue.”

1. Strongly Disagree
2. Disagree
3. Somewhat Disagree
4. Neither Agree nor Disagree

5. Somewhat Agree
6. Agree
7. Strongly Agree

% of students with these responses is your Customer Effort Score

Using Data and Feedback

Use data and feedback to improve:

- Processes
- Self-serve resources
- Knowledgebase
- Policies

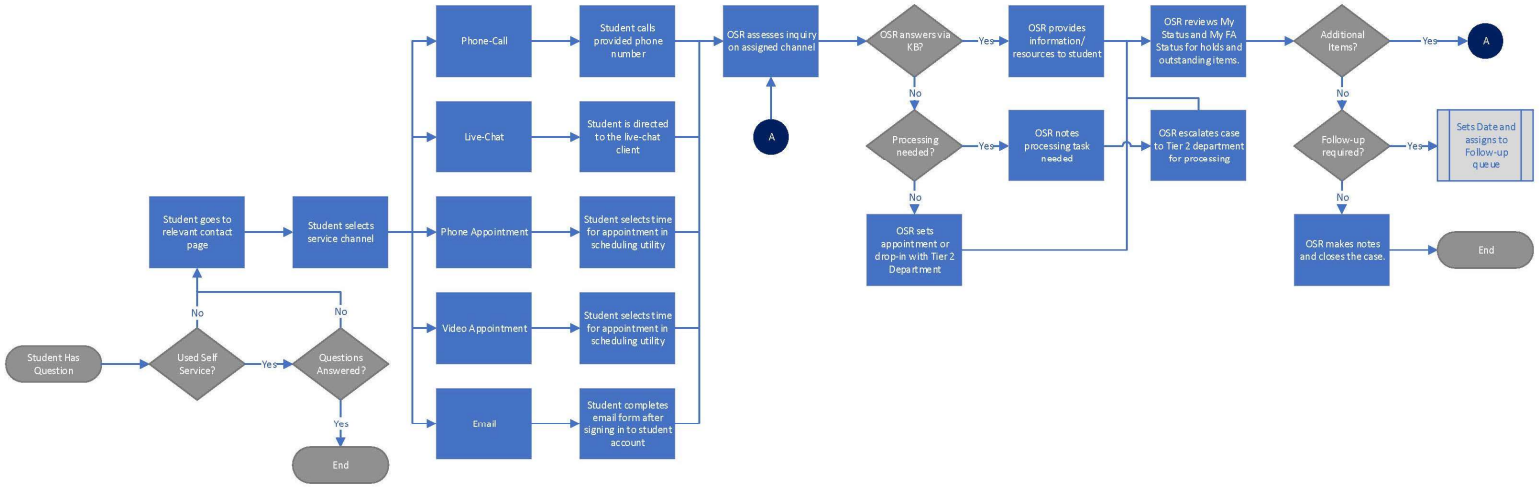
Ask: Why do we do it this way?

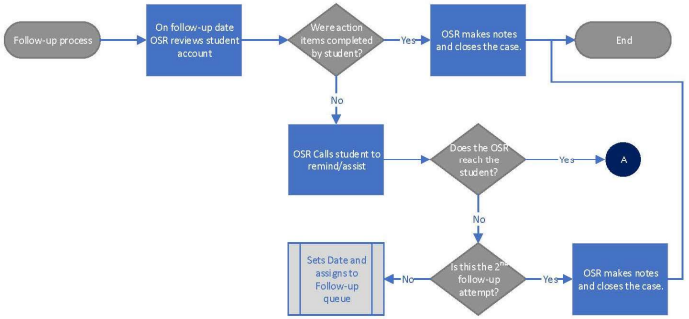
Improving Processes

Process Mapping

Find…

- Choke points
- Redundancies
- Unnecessary Steps





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Virtual One-Stop Process Map

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Any Questions

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