

2014

SASFAA

Annual Conference

*Hitting Our Stride by
Celebrating Our Strengths*



Between Hello and Goodbye in the financial aid office

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Who are your customers?

- External customers
(Students/parents)
- Internal customers
(Your co-workers and those in other offices,
administration)



Prepare for your student customers

- Arrive to work on time (or early)
- Organize desk, emails, files, etc. (A messy desk can present a poor impression)
- Keep notes and review prior to appointment
- Know your job (and others' responsibilities)-
train, train, train
- Know office policies and procedures and how
to explain
- Reduce paperwork



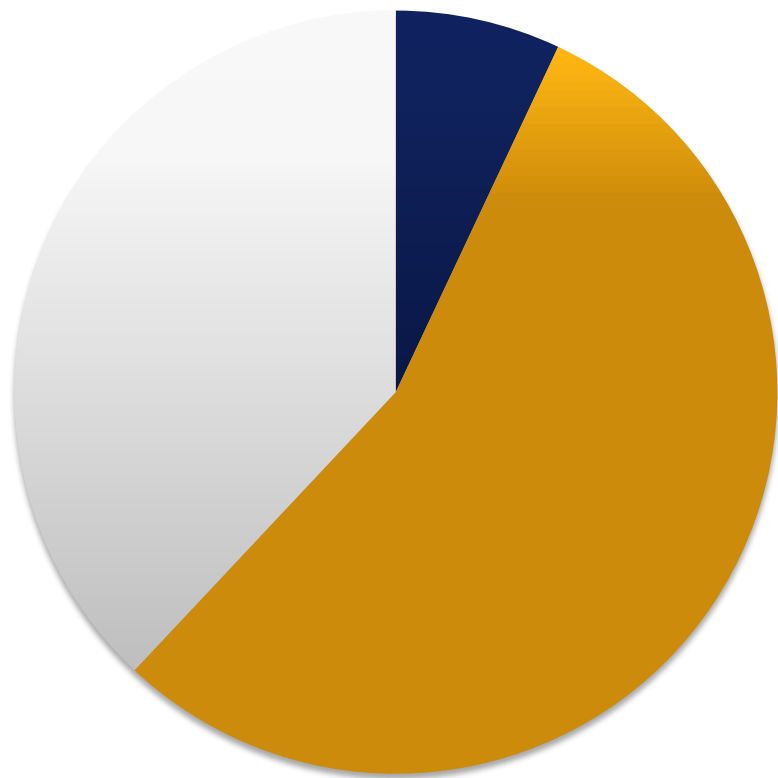
Greet every student and parent

- Make eye contact
- Use the student's name
- Ask how you can provide help and give your name
- During peak time of the year, when students may have to wait, serve snacks.



Face-to face communication

Sales



- Words
- Body Language
- Tone of Voice



Non-Verbal Communication

- Make immediate eye contact
- Watch body language that can send the wrong message
- Nod to indicate you are listening





Vocal Qualities

- Tone of voice
- Inflection in the voice
- Rate of speech
- Intensity





Matching intensity-not always

If the student is...

- Natural
- Angry
- In a panic
- Friendly
- Overburdened
- Frustrated

Then you are...

- Natural
- Calm
- Calm
- Friendly
- Empathetic
- Understanding



Practice active listening



- Focus on the student—and nothing else
- Keep an open mind
- Listen between the lines



What keeps us from listening...

- Being pre-occupied
- Trying to multi-task
- Being interrupted
- Thinking about your response before the student finishes talking
- Jumping to conclusions based on personal beliefs



Check for understanding

- Ask as clarifying question
- Summarize your understanding





Recommend a solution if possible

- Provide a thorough explanation – more than a one-word answer. Try not to talk in “Financial Aid” language.
- Make sure your tone fits the message
- If you don’t know the answer, say so, **BUT** find out
- Be versed in other areas, such as payment plans, financing options, options for shorter time to degrees



When you can't fulfill the student's request

- Explain the reason
- Show empathy
- Tell the student what you CAN do; offer an alternative solution or option, but never offer what you cannot deliver



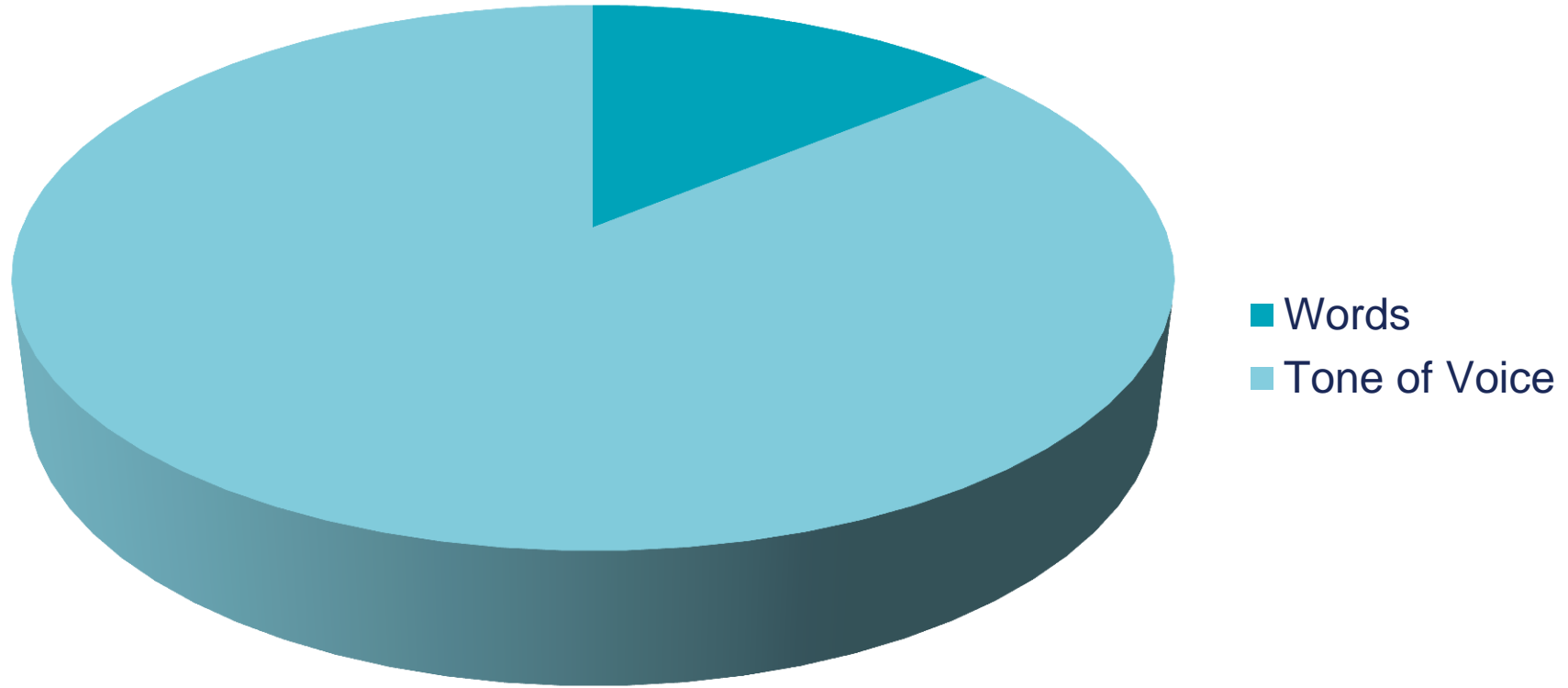
Difficult situations

- Assure the student you are going to help
- Listen carefully, do not interrupt
- Re-state the issue
- Express empathy
- Do not apologize to the student unless you are at fault
- If you must explain a regulation or policy, explain how that regulation or policy helps or protects the student



Over-the-phone communication

Sales





Answering the phone

- Pick up the phone within an agreed upon number of rings (usually 3)
- Greet the caller in a professional manner.
- Give your name
- Ask the student/parent how you can help
- Sound enthusiastic and ready to help but don't call anyone "honey" or "sugar"



Placing a caller on-hold

- Get permission
- Explain why
- Give a time frame
- Thank customers for holding after returning to the line





Revamp the financial aid website

- Purpose of website is to give students and parents information that will answer their questions from start to finish
- Is your website a self help tool?
- Some schools have a financial aid scheduler to assist making appointments
- Students that email the FA office should receive a response within 2 days



Before you say goodbye

- Ask if the student understands what he/she must do and/or what you will do – write it out on paper if needed
- Inform student when to expect action to take place
- Ask the student if all his/her questions have been addressed
- Look up student's account (make a note on record)
- Check to see if you need anything from the student's that wasn't addressed