

Customer Service On A Budget Financial Aid/Veterans Assistance Office



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Who is a Customer?

A Customer

A customer is the most important person ever in this office—in person or by mail.

A customer is not dependent on us, we are dependent on him.

A customer is not an interruption of our work, he is the purpose of it. We are not doing him a favor by serving him, he is doing us a favor by giving us the opportunity to do so.

A customer is not someone to argue or match wits with. Nobody ever won an argument with a customer.

A customer is a person who brings us his wants. It is our job to handle them profitably to him and to ourselves.

L.L. Bean

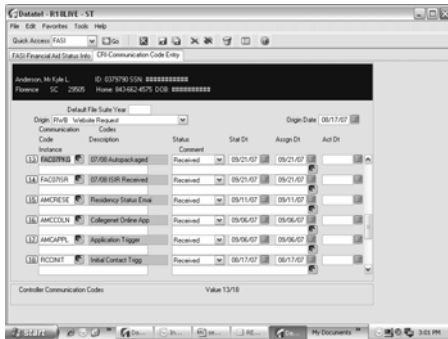
Identify Customers

- Prospective Students
- Students
- Faculty
- Staff
- Units within Financial Aid/Veterans Assistance

Satisfy Prospective Students Wants & Needs

- Financial Aid/FAFSA and VA Educational Benefits workshops
 - Limited travel funds
 - Held on Campus
 - Marketing department – radio, newspaper, TV
 - PSAs
 - High school counselors advertise
- Tracked using Communication Management

Communication Management - CRI



Satisfy Current Students Wants & Needs

- Informational Workshops
 - FAFSA Workshops
 - VA Educational Benefits Workshops
 - Classroom Presentations
 - Emails sent using Communication Management and EMAL
- Tracked using Communication Management

VA Indicator on Class Roster

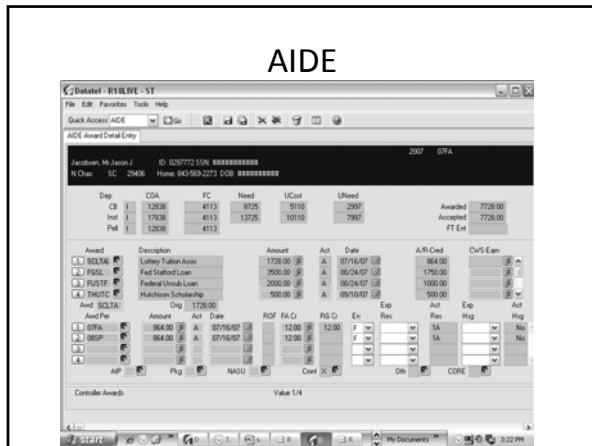
Student ID	E-mail address	Prior Aid	Class	Status	Credits	CEH	Student Profile	Veterans Student	Foreign Student
03028	esoren102@igti.net		SI	Att	3.00				
03123	eloren102@igti.net		SI	Att	3.00				
03047	eloren102@igti.net		SI	New	3.00				
03024	eloren102@igti.net		SI	New	3.00				
03025	eloren102@igti.net		SI	New	3.00				
03173	eloren102@igti.net		SI	New	3.00				
03188	eloren102@igti.net		SI	Att	3.00				V
03030	eloren102@igti.net		SI	Att	3.00				V
03174	eloren102@igti.net		SI	New	3.00				V

Satisfy Staff Wants & Needs

- Presentations at staff meetings
- Reminder/Informational emails
- Training on how to access FA /VA screens

FASI

AIDE



Satisfy Units Within FA/VA Wants & Needs

- Training sessions
 - Conference calls
 - Video
- Weekly meetings (when possible)
- Professional Development Opportunities (as budget allows)
- **Have FUN!**



Dealing With Irate Customers



Yes, we do have irate customers!

- How do you defuse a situation where there is a irate customer?
- Is there enough chocolate?
- Do you call Public Safety?

What about educating the customer?

- Letting them know the history behind the issue - how many times the FA/VA Office has tried to contact them with the needed information.
- Helping them realize how they can take responsibility and be in control of *their* financial aid.

Questions? Or better yet...

- Answers????
