

# TASFAA 2015

## A Growing Family Tree

### **IMPROVING CUSTOMER SERVICE INTERACTIONS**



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## Customer Service Strategies



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# Customer Service

- *Spend a lot of time talking to customers face to face. You'd be amazed how many companies don't listen to their customers. ~ Ross Perot*
- *If you do build a great experience, customers tell each other about that. Word of mouth is very powerful. ~ Jeff Bezos, CEO Amazon.com*
- *The key is to set realistic customer expectations, and then not to just meet them, but to exceed them — preferably in unexpected and helpful ways ~ Sir Richard Branson, Virgin Group*
- *Your most unhappy customers are your greatest source of learning. ~ Bill Gates*



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# Multiple Channel Strategies to Assist Customers

- Office Visit
- Call Center
- Website
- E-mail
- Consumer Materials
- Correspondence
- Social Media
- Kiosk
- Family & Friends



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# Customer Service Model

- Do your customers (students/families) have a clear idea of the service they expect from you?
- Can you be contacted easily?
- Do you have competent and well trained staff?
- Do you respond quickly to inquiries and requests?
- Do you gather information about your customers and what they want?
- Do you make it easy for customers to complain and to make suggestions about the quality of your services?
- Do you involve your customers in the development of products and services?



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## Keys to a Successful Customer Service Program



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# Your Brand Promise

- Does your institution have a brand promise?
- Does your staff know what it is/means?
- Can they give an “elevator speech”?



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# Brand Funnel

- Awareness
- Consideration
- Preference
- Purchase
- Loyalty/Advocacy



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# Important Things to Consider

## Front Line Staff

- ❖ Education
- ❖ Training
- ❖ Motivation

## Managing Issue Resolution

## Measuring Results

## Other Servicing Channels

- ❖ Website
- ❖ Social Media



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# Sallie Mae's Approach to Staff Education

- Education
  - Institutional Knowledge
  - Products and Services
  - Policies and Procedures
- Training
  - Communication Skills
  - Professionalism
- Motivation
  - Performance Feedback
  - Career Development



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# How Sallie Mae Manages Issues

- Listens to details surrounding issue
- Identifies root cause
- Communicates issue to stakeholders
- Major issues are logged and researched
- Shares issue/findings thru internal communication vehicles (KnowledgeShare and “Hot Topics” newsletter)
- Management Review



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# Sallie Mae's Issue Escalation Process



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# Measuring Results

- Service level tracking
- Issue resolution tracking
- Customer feedback



**“What gets measured gets done.”~ Peter Drucker**



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# How Sallie Mae Measures Results

- Focus on Quality Service
  - Quality Assurance Program = Customer Satisfaction
  - Compliance
  - Management Listening Sessions
- Issue Resolution Tracking
  - Review of “Hot Topics”
  - Customer Experience Quality Report
- Know the Service You Deliver



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# How Sallie Mae Measures Results

- Customer Feedback – Post Call Survey
  - Rate your agent's ability to resolve your issues
  - Rate your agent's overall customer service
  - Rate your agent's communication skills
  - Rate how likely you are to recommend Sallie Mae to a friend, family member or business associate



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# Other Servicing Channels

- You can meet students where they are
  - Website
  - Social Media sites
- Larger reach using fewer resources
  - Field common questions
  - Reduce phone calls by addressing simple issues
  - Shorten lines and office traffic



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# How Can You Apply These Best Practices

- Solicit quantitative feedback directly
  - Comment cards/Email surveys
  - Post engagement survey (office visit, phone call, etc.)
- Open a forum for qualitative feedback and/or discussion
  - Facebook page creation/update
  - Focus groups (staff and students)



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# QUESTIONS?



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