

# MAINTAINING CUSTOMER SERVICE WITH LESS STAFF

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# CREATE A COMFORTABLE SPACE

- Bring out your personality
- Make it a fun environment
- Humor is always welcome



# LISTEN

- Empathize
- Paraphrase
- Ask questions to engage



PEOPLE WILL FORGET  
**WHAT YOU SAID**  
PEOPLE WILL FORGET  
**WHAT YOU DID**  
BUT PEOPLE WILL NEVER FORGET  
**HOW YOU MADE  
THEM FEEL**

- MAYA ANGELOU -

## MAKE A CONNECTION

- Look for clues in what they're wearing
- Finding a common interest instantly relaxes the situation
- Keep it light
- Helps get the student engaged

**WE HAVE A LOT  
IN COMMON**



# REASSURANCE GOES A LONG WAY

- Remember **YOU** are the expert
- Think of simple solutions



# GET ORGANIZED

- Create Procedures
  - Helps when it's time to delegate
  - Screenshots are your friend
- Cheat Sheets for Students
  - Keep it Simple
  - Work with Marketing if you have it
  - Canva is really easy to use
- Spreadsheets for EVERYTHING



# CHECK IN WITH THE BOSS

- *Weekly check-in's*
- *Helps to keep priorities aligned*
  - *The last thing you want to do is go off in a random direction when your boss has other priorities*
  - *Make sure they know about YOUR priorities and deadlines*
- *Believe it or not...Relieves some Pressure*
  - *They may be able to help delegate if you are met with resistance*



# DELEGATE

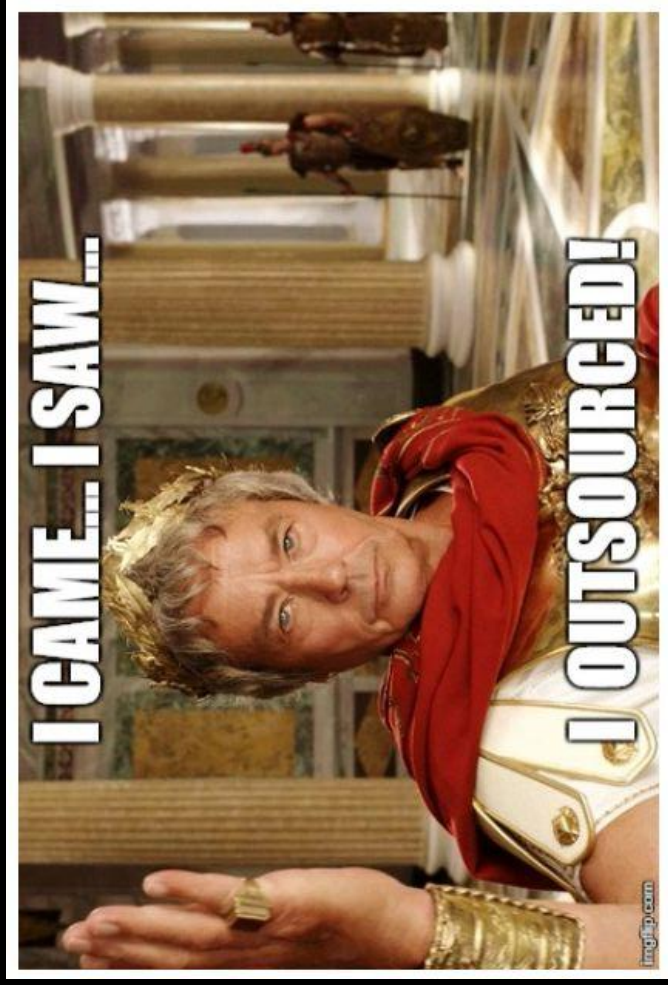
- Figure out who can help
- Think outside the box
- Don't forget about FERPA!





# OUTSOURCING ISN'T ALWAYS BAD

- Default Management
- Verification
- R2T4



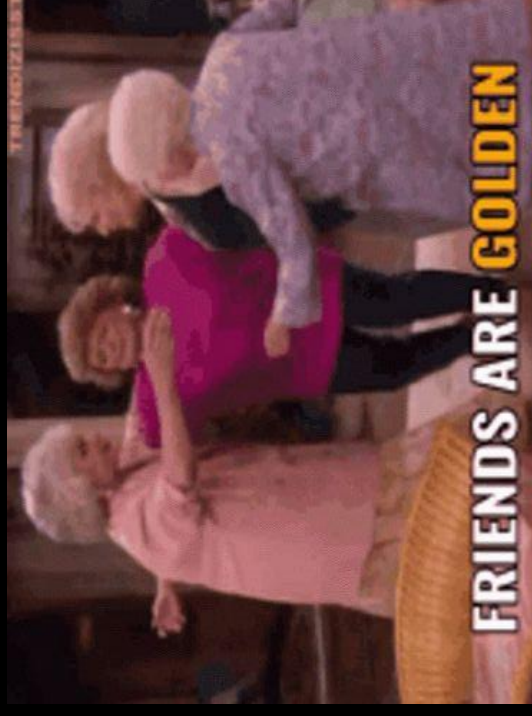
# KNOW WHO TO CONTACT

- Systems Contact(s)
- IT procedures
  - Help Ticket
  - Phone a Friend
- SAIG Helpline
- COD Helpline
- Colleagues at other institutions



# MAKE FRIENDS AROUND CAMPUS

- Connections with Departments
  - Business Office
    - Disbursement speed and consistency
  - Advising/Outreach
    - SAP and FAFSA Nights
  - Admissions
    - Cross train to help with customer service
- Cross training goes a LONG way!
- Helps cut down on misinformation



## MAKE FRIENDS AT OASFAA

- Like-minded individuals who get it!
- Build connections and learn from seasoned professionals.
- Add tools to your toolbox!



# CONTACT

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