

East Georgia College
University System of Georgia
Customer Service Improvement Plan
Basic Customer Service

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Date: October 1, 2006

1. Institution Overview

East Georgia College, nestled deep in the heart of the caring community of Swainsboro, Georgia, in a beautiful 227-acre pine forest, is an accredited two year degree-granting college within the University System of Georgia. East Georgia College is the access and opportunity hub of southeastern Georgia – large enough to provide distinguished educational and cultural experiences for students and the community, but small enough to provide an individualized personal touch assuring supportive, quality service. It is the people – students, faculty, and staff – who make East Georgia College a special place of lasting friendships... a place where everyone knows your name and genuinely cares about your success.

With a total of 100 employees (62 full-time staff and 38 full-time faculty) serving 1700+ students, East Georgia College has long offered courteous and friendly service in a prompt and timely manner. This, coupled with a tradition of academic excellence and student success, makes East Georgia College the perfect choice for many students as they transition from high school to college. People-skills and demeanor are significant criteria in the hiring of our faculty and staff. To emphasize the importance of excellence in service, East Georgia College initiated our "Ritz Carlton" award two years ago. It goes, by vote of the students, to the faculty or staff member who most exemplifies our tradition of courteous and friendly service.

With strong leadership support, East Georgia College initiated formalized customer service training in 2005 in an effort to build upon and strengthen our service accountability. Therefore, Governor Purdue's Customer Service Initiative enhances our desire and commitment to provide an even higher level of assistance. This is an opportunity to further engage in successful, enduring service to the students and communities we serve and we gladly welcome any input as we sustain this continuous process of creating faster, friendlier, easier methods to carry out our mission.

2. Customer Service Organization Overview

The goal of this comprehensive customer service initiative is to improve and enhance telephone etiquette and basic customer service skills for all staff, especially front-line employees engaging in direct, daily contact with our key customers (current and perspective students, parents, and the general public). Efforts will be focused on staff in the following departments to ensure total campus engagement:

- (a) Enrollment services – Admissions, Financial Aid, and Student Records
- (b) Student Services and Student Activities
- (c) Office of the Vice President of Student and Enrollment Services
- (d) Office of the Vice President of Fiscal Affairs
- (e) Fiscal Affairs
- (f) Business Office
- (g) Plant Operations
- (h) Human Resources
- (i) Security
- (j) Facilities Management
- (k) Information and Instructional Technology
- (l) Library
- (m) Math/Science Division
- (n) Humanities Division
- (o) Social Science Division
- (p) Public Information
- (q) Continuing Education
- (r) Office of the Vice President of Academic Affairs
- (s) Office of the President
- (t) East Georgia College - Statesboro

3. Customer Service Improvement Plan Summary

The East Georgia College staff interact with a variety of customers, primarily students, on a daily basis. The focus of this plan is to improve external communication and simplify processes for our primary key public, the students, while enhancing internal communication among staff in an effort to strengthen a positive work culture.

Professional development is the cornerstone of this endeavor. It will be accomplished over the next 12 months through a series of focused customer service training modules specifically tailored for each department, enabling them to strengthen the service culture. Phone etiquette will be the initial focus followed by multi-faceted training that will encompass the basics of quality customer service; communication and listening skills; phone/e-mail etiquette; service skills for coping with challenging customers and issues; organization and time management; cross-training between departments (when applicable); collaboration and teamwork methods; and empowerment through leadership. All training will focus on the Governor's standards as defined below.

- Own the customer's issue
- Greet the customers promptly and courteously

- Listen to the customers with respect. Be polite. Focus on their perspective.
- Honor your commitments in a timely manner.

An additional standard will be added to include:

- Provide the customer with accurate and up-to-date information.

4. Friendlier-People

4a: Leadership and Organizational Changes

Name		Friendlier 4.a.1 — Leadership Support – (Campus-Wide)	
Description	President Black has communicated his support and expectations of this initiative to his Senior Staff. During the Fall Workshop (8/1 – 8/3), President Black announced the customer service initiative and standards to all faculty and staff and communicated his support of the Governor's Customer Service Initiative.		
Personnel	CSC will work with the President's office to include pertinent information for Dr. Black to deliver in his announcement.		
Start	May 1, 2006	End	August 3, 2006
Notes	Completed.		

Name		Friendlier 4.a.2 — Leadership Support – (Division Specific)	
Description	The Senior Staff of each department will send correspondence to their employees re-emphasizing commitment for the Governor's initiative. Specific departmental goals will also be defined.		
Personnel	CSC will work with each Senior Staff Administrator to compile information regarding the customer service initiative so that it can be included in a mailing to all employees.		
Start	October 1, 2006	End	October 31, 2006
Notes	None.		

Name		Friendlier 4.a.3 — Organizational Change – (Campus Wide)	
Description	All orientation and training material will be updated to reflect the new standards.		
Personnel	CSC will work with office staff to have information updated.		
Start	July 25, 2006	End	August 31, 2006
Notes	This includes the training for staff, administration, and student employees.		

Name		Friendlier 4.a.4 — Organizational Changes – (Campus Wide)	
Description	President Black will establish a committee of staff representatives to work with the CSC in implementing and developing ongoing Customer Service Initiatives that will meet the Governor's standards.		
Personnel	CSC will work with the President to identify the committee members.		
Start	September 1, 2006	End	May 31, 2007
Notes	In progress.		

Name		Friendlier 4.a.5 — Organizational Change – (Campus Wide)	
Description	Each Spring, an employee will be recognized with the "Ritz Carlton" award for demonstrating exemplary customer service.		
Personnel	CSC will work with the President's office, and the Customer Service Committee to coordinate the awards program.		
Start	August 1	End	April 1
Notes	This award will be presented at the annual Honors Night Program.		

Section 4b: Communications and Teamwork

Name		Friendlier 4.b.1 — Communication – Expectations (Division Specific)	
Description	General training information will be sent to all employees within each department outlining the expected standards.		
Personnel	CSC will work to develop and disburse materials.		
Start	August 1, 2006	End	October 31, 2006
Notes	Development of the materials will begin on August 1 with distribution to begin mid October.		

Name		Friendlier 4.b.2 — Communication – Expectations (Division Specific)	
Description	Articles will be included in the "Cat Tracks" newsletter every month to reinforce standards and communicate efforts.		
Personnel	CSC will work with Office of Public Information to include appropriate information in the newsletter each month.		
Start	August 1, 2006	End	On-going
Notes	Distribution of newsletter is once per month during the academic year.		



Section 4c: Selection, Training and Development

Name	Friendlier 4.c.1 — Selection, Training and Development (Campus-Wide)		
Description	As mentioned in section 4.a 3, all orientation and training materials will be updated to reflect the Governor's standards.		
Personnel	CSC will work with office staff to have information updated.		
Start	August 1, 2006	End	On-going
Notes	Student employee training will be held in conjunction with departmental orientation/training upon hire.		

Name	Faster 4.c.2 — Selection, Training and Development		
Description	Supervisors of student employees will participate in a "train the trainer" module that will provide them with coaching skills and evaluation tools to reinforce principles taught during the student employee training sessions.		
Personnel	CSC will work with office staff to develop training materials/tools.		
Start	November 1, 2006	End	On-going
Notes	This session will be offered in November and February.		

Name	Faster 4.c.3 — Selection, Training and Development (Division Specific)		
Description	Training sessions, beginning with phone and e-mail etiquette, will be held with front-line staff to improve and enhance communication and listening skills, service skills for coping with challenging customers and issues, organization and time management, collaboration and teamwork methods, cross-training (when appropriate), and empowerment through leadership.		
Personnel	CSC will work with Customer Service Committee to design and implement training.		
Start	October 1, 2006	End	May 1, 2007
Notes	Training sessions will be offered in October, December, February, and April.		

Section 4d: Employee Engagement, Standards and Metrics

Name			
Friendlier 4.d.1 — Employee Engagement (Division Specific)			
Description	Focus group sessions will be held with front-line staff within each department to assess areas for process improvement and to gather suggestions for creating a faster, friendlier, easier workplace.		
Personnel	CSC will work with office staff and Customer Service Committee to develop assessment tool and analyze feedback results.		
Start	October 1, 2006	End	December 31, 2006
Notes	Focus group sessions will begin in October.		

Name			
Friendlier 4.d.2 — Employee Engagement (Campus-wide)			
Description	As outlined in 4a.5, an employee (voted on by the student body) possessing exemplary customer service skills will be recognized in May with the annual "Ritz Carlton" award.		
Personnel	CSC will work with the Customer Service Committee, Institutional Research, and the President's office to coordinate the student survey and award presentation.		
Start	January 1, 2007	End	April 1, 2007
Notes	This award will be announced at the annual Honors Night Program.		



As previously mentioned, the following standards will be utilized to assess the telephone skills of the employees within each department and will later be expanded to include additional areas of the customer service initiative. A copy of the behavioral examples of the standards is included in Appendix A. A rating instrument that will be used by "anonymous" callers and "mystery" students is included in Appendix B. On-line surveys will also be utilized.

Name		Standard 1: Own the Customer's Issue	
Description	Employees will be provided with training modules and materials that outline proper techniques when assisting customers.		
Personnel	CSC, office staff – Develop training materials and assessment tools and implement training; Departmental front-line staff – will be trained and assessed.		
Start	October 1, 2006	End	On-going
Notes	All training will adhere to the updated standards.		
Standards	Take responsibility for the customer's issues/concerns; demonstrate care through tone of voice; use reflective listening; take initiative to assist the caller completely.		
Metric	Caller rating form.		
Metric Reporting	Baseline measurement will be obtained during October, 2006. Reassessment will be completed in February and August. Results and feedback will be provided to supervisors for on-going improvement efforts.		

Name		Standard 2: Greet customers promptly and courteously.	
Description	Employees will be provided with training and materials that outline proper telephone greetings and dialogue.		
Personnel	CSC, Office Staff – Training and materials; Departmental front-line staff – training and assessment.		
Start	October 1, 2006	End	Ongoing
Notes	All training material will adhere to updated standards.		
Standards	Greet walk-in office guests as promptly as possible, considering limitations associated with manpower and peak work times. Phone calls should be answered by the third ring; use friendly tone of voice; state: a greeting (i.e. good morning or good afternoon); the department name; your name; and how may I help you. Conversation should end with "Thank you for allowing me to help you."		
Metric	Caller rating form.		
Metric Reporting	Baseline measurement will be obtained in October, 2006. Reassessment will be done in February and August. Results and feedback will be provided to supervisors for on-going improvement efforts.		

Name	Standard 3: Listen to customers with respect. Be polite. Focus on their perspective.		
Description	Employees will be provided with training and materials that outline methods to show respect and concern over the phone.		
Personnel	CSC, Office Staff – Training and materials; Departmental front-line staff: training and assessment.		
Start	October 1, 2006	End	On-going.
Notes	All training material will adhere to updated standards.		
Standards	Give full attention to your customer (exceptions will occur during peak work times and in offices with limited manpower). Ignore distractions such as background noise, other customers, typing on the keyboard, etc. Acknowledge the customer's point of view, and continue with a pleasant and friendly tone even if you don't agree with the customer's statement(s). Never use rude, condescending tones.		
Metric	Caller rating form.		
Metric Reporting	Baseline measurement obtained in October, 2006. Reassessment will be done in February and August. Results and feedback will be provided to supervisors for on-going improvement efforts.		

Name	Standard 4: Honor your commitments in a timely manner.		
Description	Employees will be provided with training and materials that outline ways to monitor and honor commitments.		
Personnel	CSC, office staff – Training and materials; Departmental front-line staff – training and assessment.		
Start	October 1, 2006	End	On-going.
Notes	All training and materials will adhere to the updated standards.		
Standards	Always strive for a 24-hour response time. This may not always be possible due to the complexity of the issue, the number of departments/individuals involved, and other factors beyond the control of the responding office. During such occasions, the customer should be provided with a clear understanding of the steps required for resolution and be given an accurate estimate of the time necessary to honor the request.		
Metric	Caller rating form.		
Metric Reporting	Baseline measurement obtained during October, 2006. Reassessment will be done in February and August. Results and feedback will be provided to supervisors for on-going improvement efforts.		

Name		Standard 5: Provide accurate and up-to-date information.	
Description	Employees will be provided with training and materials that outline ways to keep them informed and reduce the probability of having to transfer or "bounce" the customer needlessly to another department.		
Personnel	CSC, office staff – Training and materials; Departmental front-line staff – training and assessment.		
Start	October 1, 2006	End	On-going.
Notes	All training and materials will adhere to the updated standards.		
Standards	Familiarize yourself and utilize FAQ sheets on the EGC website. When a customer approaches an employee with an issue or request for information that is outside that employee's sphere of responsibility, the employee should politely direct the customer to the person or department that can assist them, and remain with the customer (in person or on the phone) until they are successfully transferred to the appropriate person. If this is not possible, the employee should find out the answer to the inquiry and call the customer back with the accurate information within the 24-hour response time.		
Metric	Caller rating form.		
Metric Reporting	Baseline measurement obtained in October, 2006. Reassessment will be done in February and August. Results and feedback will be provided to supervisors for on-going improvement efforts.		

Section 5: Process (Faster)

- a. Identify Key Processes to be changed by this initiative:
 - Standardized way to handle phone calls has been developed by the Basic Customer Service Focus group and will be implemented throughout each department.
- b. Describe changes/improvements to those processes:
 - By utilizing proper phone techniques and keeping front-line staff informed, misdirected phone calls will be reduced allowing for a faster response time. This will be assessed using the telephone surveys to compare baseline measurements against data collected following the training.
- c. Describe how the process speed/cycle time will be benchmarked to measure improvement:
 - Random telephone checks will track how quickly the call is answered, the length of time it takes to receive an answer, and how many people the customer speaks to before they get a response.

Section 6: Technology (Easier)

- a. Describe current technology supporting current processes identified for improvement:
 - Standard phones
- b. Describe new technology (software, hardware, communications) required:
 - Feedback obtained from the employee focus groups will aid in identifying needed equipment and/or additional job supports.
- c. Describe benchmarking exercises to measure performance improvement attributed to new technology:
 - To be determined.

Section 7: Customers

- a. Identification
 - Customers (students, parents, community members, faculty, staff, general public) contacting any department.
- b. Feedback, methods for collecting:
 - Random telephone checks
 - Employee focus groups
- c. Service metrics:
 1. Standard People Metrics (Qualitative)
 - Random telephone checks
 - Employee focus groups
 2. Service Delivery/Time Metrics (Quantitative)
 - Ratings from random telephone checks
- d. Methods for Incorporating Customer Feedback:
 - Reports will be provided to departmental supervisors following each random telephone check. Following each assessment period, reports will also be shared with the President, Vice President of Academic Affairs, Vice President for Fiscal Affairs, and the Vice President for Student and Enrollment Services.

Appendix A
Standards and Metrics Summary (as distinguished by the Basic Customer Service Focus Group)

Summary of Standards and Metrics
Basic Customer Service Taskforce

Standard	Behavior	Metric
Own the customer's issue.	When an employee is contacted by a customer with a question or issue, the employee should not break contact with the customer until the employee has completed one of the following: 1. Dealt completely with the issue. 2. Handed the customer off directly to another employee with the authority and knowledge to handle the issue. 3. Informed the customer the employee must seek out the information s/he requires, promise a follow up by a specific time and provide the customer with his/her name and contact information in the event the customer requires additional attention.	Customers will agree with survey statement indicating "representative was concerned about my problem/issue." Customers will agree with survey statement indicating "representative helped me solve my problem/issue." Customers will agree with survey statement indicating "the representative referred me to the person who could help me. I was not bounced around from office to office." Customers will agree with survey statement indicating that "the representative provided me with an update or resolution to my problem on or before the promised date."
Own the customer's issue.	Accept responsibility for assisting the customer with his/her problem/issue.	Customers will agree with survey statement indicating "representative was concerned about my problem/issue."
Own the customer's issue.	Use reflective listening such as paraphrasing for clarity, asking probing questions.	Customers will agree with survey statement indicating "representative was concerned about my problem/issue."
Own the customer's issue.	Demonstrate empathy with customer's feelings.	Customers will agree with survey statement indicating "representative was concerned about my problem/issue."
Own the customer's issue.	Acknowledge the problem/issue and sincerely apologize.	Customers will agree with survey statement indicating "representative was concerned about my problem/issue."
Own the customer's issue.	Solicit additional information and determine if problem/issue can be resolved immediately. If so, take action to resolve.	Customers will agree with survey statement indicating "representative helped me solve my problem/issue."
Own the customer's issue.	If not immediately resolvable, provide information to customer regarding next necessary step.	Customers will agree with survey statement indicating "representative helped me solve my problem/issue."

Own the customer's issue.	Close the conversation with an offer for additional assistance (if applicable or necessary).	Customers will agree with survey statement indicating "representative displayed professionalism during my interaction with him/her."
Own the customer's issue.	Thank the customer and let him/her know that you were glad to help.	Customers will agree with survey statement indicating "representative displayed professionalism during my interaction with him/her."
Own the customer's issue.	Extend the same level of superior service to internal and external customers.	Customers will agree with survey statement indicating "representative displayed professionalism during my interaction with him/her."
Greet customers promptly and courteously.	Employees are encouraged to wear nametags.	Focus of "Secret Customer" visits and supervisor will indicate compliance on annual performance evaluation.
Greet customers promptly and courteously.	<p>Greet customer verbally when he/she enters your office. <i>Smile and make immediate eye contact.</i> If you are currently busy with another customer, advise the newly-arrived customer that you will be with him/her momentarily.</p> <p>Introduce yourself when greeting customers (either in person or on the phone), thank them for contacting the agency, and ask how you can help them.</p> <p>When possible, use the customer's name, using the appropriate prefix (Mr., Mrs., Ms., Dr., etc.).</p> <p>Use respectful language when speaking to customers.</p> <p>Maintain pleasant and professional tone that suggests you are pleased to serve as opposed to being interrupted by the customer.</p>	<p>Focus of "Secret Customer" visits and customer will agree with survey statement indicating "representative greeted me promptly and courteously."</p> <p>Customers will agree with survey statement indicating "the representative made me feel that he/she was happy to assist me."</p>
Greet customers promptly and courteously.	Provide quality assistance to customers present in your office before answering telephone calls.	Customers will agree with survey statement indicating "representative was concerned about my problem/issue."
Greet customers promptly and courteously.	<p>Telephone calls –</p> <p>Always be prepared to answer telephone calls.</p> <p>Keep a pen and writing pad near the phone for messages.</p> <p>Use a duplicate telephone message pad. Give the original message to the employee to whom the call was placed and refer to the duplicate no later than the next business day to insure communication occurred.</p>	Supervisor will indicate compliance on annual performance evaluation.

	<p>All messages should include the following –</p> <ul style="list-style-type: none"> • The caller’s name and phone number • If offered, the caller’s department/unit/office, etc. • The date and time of the message • The nature of the message, if the caller chooses to disclose • Your name or initials 	
Greet customers promptly and courteously.	<p>Telephone—</p> <p>It is the institution’s goal to have all calls answered by a live person. When employees are out of the office, phones should be forwarded when possible to a number at which the staff member can be reached. If that is not possible, then phones should be forwarded to another staff member who can handle information requests and resolve problems. If neither of these options is possible, then calls may be forwarded to voicemail.</p>	<p>“Secret Customers” will rate the ease with which they reached the appropriate employees or alternate employees who handled their information requests or resolved their problems.</p> <p>Via survey, respondents will be asked to rate the ease with which they reached the appropriate employees or alternate employees who handled their information requests or resolved their problems.</p>
Greet customers promptly and courteously.	<p>All telephone messages will be clearly and promptly communicated. Follow-up to determine that appropriate return calls were placed.</p>	<p>Supervisor will indicate compliance on annual performance evaluation.</p>
Greet customers promptly and courteously.	<p>For answering telephone calls –</p> <ul style="list-style-type: none"> • Answer telephone by third ring. • Speak in a clear, calm, upbeat, non-hurried professional manner. <i>Smile when you talk!</i> • Identify the institution and department • Identify yourself 	<p>Focus of “Secret Customer” calls and customers will agree with survey statement indicating “my call was answered by the third ring.”</p> <p>Focus of “Secret Customer” calls and customers will agree with survey statement indicating “the representative’s tone was pleasant and professional.”</p> <p>Focus of “Secret Customer” calls and customers will agree with survey statement indicating “the representative identified his/her office/division/unit.”</p> <p>Focus of “Secret Customer” calls and customers will agree with survey statement indicating “the representative identified himself/herself.”</p>

	<ul style="list-style-type: none"> • Offer help – How may I help you? How may I direct your call? 	Focus of “Secret Customer” calls and customers will agree with survey statement indicating “the representative offered to help. “How may I help you?”
Greet customers promptly and courteously.	<p>When returning voicemail telephone calls –</p> <ul style="list-style-type: none"> • Voicemail should be used as a last resort during business hours. Ensure that there is ample telephone coverage. • A recorded voicemail message should provide an option for reaching a live person and/or expectations for a return call. • Voicemail should be checked at least twice a day. Voicemail messages that are left in the morning should be returned by the afternoon of the same day. Voicemail messages left in the afternoon should be returned by the following business morning. • Speak in a clear, calm, upbeat, non-hurried professional manner. <i>Smile when you talk!</i> • Apologize to the customer for missing his/her earlier call. 	<p>Focus of “Secret Customer” calls and supervisor will indicate compliance on annual performance evaluation</p> <p>Focus of “Secret Customer” calls and supervisor will indicate compliance on annual performance evaluation</p> <p>Customers will agree with survey statement indicating “the representative responded to my request within 24 hours by providing an answer or a status report.”</p> <p>Focus of “Secret Customer” calls and customers will agree with survey statement indicating “the representative’s tone was pleasant and professional.”</p> <p>Focus of “Secret Customer” calls and customers will agree with survey statement indicating “the representative apologized for missing my earlier call.”</p>
Greet customers promptly and courteously.	<p>When placing the customer on hold –</p> <ul style="list-style-type: none"> • If you are answering a call for another employee, place the caller on hold before attempting to locate the other employee. • Before placing the customer on hold, ask if the caller is able to hold. “May I place you on hold?” • If you have placed a customer on hold, check back within the first 30 seconds. 	<p>Focus of “Secret Customer” calls.</p> <p>Focus of “Secret Customer” calls and customers will agree with survey statement indicating “the representative asked for permission to place my call on hold.”</p> <p>Focus of “Secret Customer” calls and customers will agree with survey statement indicating “the representative did not leave me on hold</p>

	<ul style="list-style-type: none"> When you return to the customer always say, "Thank you for holding." If the customer does not want to continue to hold, offer to take a message or forward him/her to voicemail. 	<p>indefinitely."</p> <p>Focus of "Secret Customer" calls and customers will agree with survey statement indicating "the representative thanked me for holding."</p> <p>Focus of "Secret Customer" calls and customers will agree with survey statement indicating "representative offered to take a message or forward my call to appropriate voice mail."</p>
Greet customers promptly and courteously.	<p>When transferring a call –</p> <ul style="list-style-type: none"> Do not transfer a customer more than two times. Provide employee to whom the call is being transferred the number of times the customer has been transferred. If necessary, take the customer's name and number and take responsibility for conveying the message to the appropriate person for follow-up. Before transferring a call, provide the customer with the name and telephone number of the office or individual to whom the call is being transferred in case the call is disconnected and for future reference. Indicate to the employee to whom the call is being transferred the customer's name and nature of the call. Do not hang up until both parties are connected. Transfer calls with care, being sure to check the extension. Always transfer calls to a manned telephone first. Ask for customer's permission before transferring call to voicemail. 	<p>Focus of "Secret Customer" calls and customers will agree with survey statement indicating "my call was not transferred more than twice."</p> <p>Focus of "Secret Customer" calls and customers will agree with survey statement indicating that "I was provided with the correct name and telephone number prior to being forwarded."</p> <p>Focus of "Secret Customer" calls and customers will agree with survey statement indicating that "the representative remained on the line until my call was answered."</p> <p>Focus of "Secret Customer" calls.</p> <p>Focus of "Secret Customer" calls.</p> <p>Focus of "Secret Customer" calls and customers will agree with survey statement indicating that "the representative asked permission before sending my call to voicemail."</p>
Greet customers promptly and courteously.	When customers contact the wrong office or employee, either in person or by dialing the wrong number, the employee should ask who the customer is trying to reach and	Customers will agree with survey statement indicating that "when I accidentally contacted the wrong office, the representative either answered my question correctly or transferred

	assist the customer to make contact with the proper employee or agency. If the employee can answer a simple question, s/he should do so, even if it is outside his/her area of responsibility.	me to the appropriate department.”
Listen to customer with respect. Be polite. Focus on their perspective.	Give full attention to your customer. Don't be distracted by background noise, other customers, typing on keyboard, etc.	Customers will agree with survey statement indicating that “the representative gave me his/her full attention.”
Listen to customer with respect. Be polite. Focus on their perspective.	Continue pleasant tone even if you don't agree with customer's statement. Don't use condescending tone.	Customers will agree with survey statement indicating that “the representative spoke to me in a pleasant tone during our conversation.”
Listen to customer with respect. Be polite. Focus on their perspective.	Acknowledge customer's point of view – “I understand how you must feel about this....”	Customers will agree with survey statement indicating that “the representative sincerely acknowledged my point of view.”
Listen to customer with respect. Be polite. Focus on their perspective.	Employees will listen fully to the customer's question or issue and ask questions to clarify the issue.	Customers will agree with survey statement indicating that “the representative heard me out and then asked appropriate questions to better understand my concerns or needs.”
Honor your commitments in a timely manner.	<p>Email—</p> <ul style="list-style-type: none"> Email should be checked at least twice a day. Email messages received in the morning should be responded to by the afternoon of the same day. Email messages received in the afternoon should be responded to by the following business morning. If you are to be away from your office for several days, your email response message should state the time that you will be out of the office and indicate a contact for immediate assistance. When you return to your office, every effort should be made to review all email messages and respond to them by the end of the first day back in the office. You may respond to the customer's email request by providing either a resolution or a status report. Each of your email responses 	<p>Customers will agree with survey statement indicating “the representative responded to my request within 24 hours by providing an answer or a status report.”</p> <p>Focus of “Secret Customer” calls and supervisor will indicate compliance on annual performance evaluation.</p> <p>Focus of “Secret Customer” calls and supervisor will indicate compliance on annual performance evaluation.</p> <p>Customers will agree with survey statement indicating “the representative responded to my request within 24 hours by providing an answer or a status report.”</p>

	<p>should include an email signature that includes your name, title, office/division, and contact information.</p> <ul style="list-style-type: none"> If your email response involves a referral of the customer to another office/division or person, full contact information should be provided in your response. 	<p>Customers will agree with survey statement indicating “the representative’s communication included representative’s name, title, office/division, and contact information.”</p> <p>Customers will agree with survey statement indicating “the representative’s communication included complete contact information for the person or office I was referred to.”</p>
Customize technology to meet needs of customers.	Familiarize yourself with the student email address rubric in order to assist students requesting information.	Focus of “Secret Customer” calls and supervisor will indicate compliance on annual performance evaluation.
Customize technology to meet needs of customers.	Familiarize yourself with BannerWeb access rubric in order to assist students requesting information.	Focus of “Secret Customer” calls and supervisor will indicate compliance on annual performance evaluation.
Customize technology to meet needs of customers.	Familiarize yourself with information provided to you on staff portal dashboards in order to assist customers seeking information. For example, financial aid, public service, student portal page, etc.	Focus of “Secret Customer” calls and supervisor will indicate compliance on annual performance evaluation.
Customize technology to meet needs of customers.	Determine if voicemail system could be reconfigured to provide better service to customers.	Employees will agree with survey statement indicating that “the voicemail system meets the needs of my office/division/unit” or will provide suggestions for improvement.
Customize technology to meet needs of customers.	Determine if additional technology could assist you in better serving customers, i.e. – hands free headset, cordless phone, etc., and make appropriate requests.	Employees will agree with survey statement indicating “technology meets the needs of my office/division/unit” or will provide suggestions for improvement.
Provide the customer with accurate and up-to-date information.	<p>Ascertain the nature of the inquiry as best you can and provide the customer with accurate, clear, and concise information to facilitate understanding.</p> <p>If you do not know the answer to a customer’s question, conduct research to determine the accurate response. Do not provide inaccurate information under any circumstances.</p> <p>If you must refer the customer to another office, conduct research to make sure you have selected the correct office for transfer. Under no circumstances should customers be “bounced” or “given the run around.”</p> <p>Provide customers with information that is timely and accurately answers their questions.</p> <p>Information provided will be relevant to the</p>	<p>Customers will agree with survey statement indicating that “the representative heard me out and then asked appropriate questions to better understand my concerns or needs.”</p> <p>Customers will agree with survey statement indicating “the representative was knowledgeable and provided accurate information.”</p> <p>Customers will agree with survey statement indicating “the representative referred me to the person who could help me. I was not bounced around from office to office.”</p> <p>Customers will agree with survey statement indicating “the representative was knowledgeable and provided accurate information.”</p>

	<p>customer's inquiry and will assist them in the effective completion of their task.</p> <p>Customers should be provided with appropriate support documentation such as forms, web sites, directions, etc.</p>	<p>Customers will agree with survey statement indicating "the representative informed me of other useful information or documentation related to my inquiry."</p>
<p>Provide the customer with accurate and up-to-date information.</p>	<p>Provide the customer with the name, telephone number, and e-mail address of the individual who can provide further assistance if needed in the future.</p>	<p>Focus of "Secret Customer" calls and customers will agree with survey statement indicating "the representative provided me with the name and contact information of an employee I could contact for further assistance in the future."</p>
<p>Provide the customer with accurate and up-to-date information.</p>	<p>Agencies should develop and all employees should have available a list of frequently asked questions (FAQ) and answers.</p> <p>Such FAQ lists should be updated periodically to adjust the list to changing issues, inquiries, and circumstances.</p> <p>Agencies should maintain an up-to-date website that is user-friendly for both the employee and the customer.</p> <p>FAQ lists should be reviewed monthly or more frequently, as changes occur.</p>	<p>Customers will agree with survey statement indicating "the representative was knowledgeable and provided accurate information."</p>
<p>Provide the customer with accurate and up-to-date information.</p>	<p>All employees should be familiar with which other employees or agencies deal with various issues and have contact information for them.</p> <p>Such subject area and contact information should be included on the FAQ sheet and/or Web site.</p> <p>A management level person should be identified to handle uncommon or unusual questions or issues.</p> <p>When a customer approaches an employee with an issue or request for information that is outside that employee's sphere of responsibility, the employee should politely direct the customer to the person or agency that can help them, and stay with the customer (in person or on the phone) until they are handed off to the appropriate person.</p> <p>In the event a customer requests information outside of an employee's direct area of responsibility, but the employee either knows the answer or can easily obtain it, s/he should</p>	<p>Focus of "Secret Customer" calls and supervisor will indicate compliance on annual performance evaluation.</p> <p>Customers will agree with survey statement indicating "the representative referred me to the person who could help me. I was not bounced around from office to office."</p> <p>Customers will agree with survey statement indicating "the representative was knowledgeable and provided accurate</p>

	<p>provide the information if s/he is confident of its accuracy. (For example, a customer may not need to be transferred to the registrar's office just to ask about the first day of class.) Once the employee provides the information, s/he should also give the customer the contact information of the appropriate office or individual for follow up questions.</p>	<p>information.”</p>
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Appendix B
Telephone Caller Assessment

Telephone Assessment Instrument

Employee Being Called: _____ **Department:** _____

Standard	Behavior	Rating			Comments
Greet Customers promptly and courteously	Telephone answered by third ring	0 No	1 Somewhat	2 Yes	
	Voice was pleasant and friendly.	0 No	1 Somewhat	2 Yes	
	Used appropriate greeting when phone was answered.	0 No	1 Somewhat	2 Yes	
	Identified department.	0 No	1 Somewhat	2 Yes	
	Identified self.	0 No	1 Somewhat	2 Yes	
	Gave statement (i.e. how may I help you, how can I direct your call, etc.)	0 No	1 Somewhat	2 Yes	
TOTAL SCORE: _____					
Own the Customer's Issue	Used reflective listening such as paraphrasing for clarity, asking probing questions.	0 No	1 Somewhat	2 Yes	
	Demonstrated empathy for customer's feelings.	0 No	1 Somewhat	2 Yes	
	Acknowledged the problem/issue and sincerely apologized.	0 No	1 Somewhat	2 Yes	
	Solicited information and solved problem/issue.	0 No	1 Somewhat	2 Yes	
	Told customer next steps and took action to solve issue.	0 No	1 Somewhat	2 Yes	
Total Score: _____					
Listen to customers with respect. Be polite. Focus on their perspective.	Employee gave full attention to your call (i.e. was not distracted by background noise, other customers, typing on keyboard, etc.)	0 No	1 Somewhat	2 Yes	
	Employee continued to use a pleasant tone of voice even if he/she did not agree with a customer statement (i.e. voice tone was not rude or condescending).	0 No	1 Somewhat	2 Yes	
	Employee acknowledged sincerely the customer's point of view.	0 No	1 Somewhat	2 Yes	
Total Score: _____					

Standard	Behavior	Rating			Comments
Honor your commitments in a timely manner.	Employee responded to customers request within 24 hours (answer or status given).	0 No	1 Somewhat	2 Yes	
	Employee provided caller with a visual of steps needed to handle request and gave accurate estimate of time required to fulfill request (i.e. go to another office to retrieve a file, etc.)	0 No	1 Somewhat	2 Yes	
	Employee asked permission and waited for answer before putting customer on hold or gave option of taking contact information and calling customer back if request would take longer than a few minutes.	0 No	1 Somewhat	2 Yes	
	Employee regularly checked in with customer while on hold or called/e-mailed if request took longer than originally estimated (i.e. did not leave customer on hold for more than 3 minutes without checking back.)	0 No	1 Somewhat	2 Yes	
TOTAL SCORE: _____					
Be accurate.	Employee answered customer's question or provided the document/info requested.	0 No	1 Somewhat	2 Yes	
	If need is beyond the scope of employee, employee offered to research it and call customer back with the answer. Or, if employee knew correct person/department for answer, he/she transferred caller while staying on the line to ensure the transfer was complete.	0 No	1 Somewhat	2 Yes	
	Employee provided name and number of the person that the customer needed to speak to for future reference.	0 No	1 Somewhat	2 Yes	
	Employee's tone remained pleasant even when needing to find answers beyond their scope of influence (i.e. tone did not suggest an interruption, but a pleasure to serve).	0 No	1 Somewhat	2 Yes	
Total Score: _____					