



Customer Relationship
Management / Call Centers
Integrated Product Team

NASFAA Conference

July 9, 2000

4:00 - 5:15 pm

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Introduction

Jeanne Van Vlandren

General Manager for Students

Denise Hill

Senior Architect

Chief Information Officer (CIO)

Dena Bates

Manager

Customer Service and Support Call Centers

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Jeanne Van Vlandren

General Manager
for Students

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SFA as a Performance Based Organization (PBO)

- ★ Goals of the PBO?
- ★ The CRM Call Center IPT is the result of the PBO's Customer Service Task Force - "One Call Does It All"
- ★ The CRM Call Center IPT is an important part of our strategy
- ★ We need involvement from all areas of SFA, including our partners, to be successful

Who is Involved?

- ★ Students and parents
- ★ Financial aid administrators
- ★ Lenders and guaranty agencies
- ★ Contractors
- ★ Government agencies
- ★ Congressional offices
- ★ General public

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What is SFA Doing to Improve Customer Satisfaction?

- ★ Formed an enterprise-wide integrated product team (IPT) to examine the current state of call center operations and recommend improvements for the future
- ★ Best practice analysis of similar industries/operations
- ★ Customer satisfaction surveys
- ★ Focus groups

Why was this IPT created?

- ★ To improve customer satisfaction
- ★ To recommend “best-in-business” call center practices
- ★ To reduce unit costs
- ★ To provide better Customer Relationship Management in a timely way through the medium that best meets their needs (i.e., phone, web, paper)
- ★ To promote electronic commerce while maintaining easy access to paper

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Denise Hill

Senior Architect
Chief Information Officer (CIO)

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What is Customer Relationship Management (CRM)?

- ★ Industry established business strategy enabling organizations to effectively manage relationships with their customers
- ★ Provides an integrated view of customers to everyone in an organization
- ★ Everyone in the enterprise is focused on the customer
- ★ Customer-centric model that allows customers to drive the process of gathering the information they desire

What is Needed to Implement a successful CRM Solution?

- ★ Qualified professional people
- ★ Well-designed processes
- ★ Leading-edge technology
- ★ Input and cooperation from various stakeholders

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What are some trends in CRM?

- ★ Lower costs per call
 - Enhanced VRU/ automated servicing
 - On-line servicing through Internet based tools
 - Streamlined processes and elimination of redundancies

- ★ More responsive customer service with Customer Contact Management Systems

- "One Call Does it All"
- "Warm" Customer Hand offs
- "Customer-centric" Servicing Models
- "Specialized Areas"

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What are some CRM Best Practices?

Component	Description	Vendors (partial listing)
Computer Telephony Integration (CTI)	Enables technology to integrate hardware with software, includes screen pops	Genesys, Lucent, Aspect, IBM, Hewlett Packard HP, Cisco (Geo Tel)
Interactive Voice Response (VR/VRU)	Allows customer to access databases through touch tone commands	InterVoice Brite, Periphonics, Aspect, IBM
Speech Recognition	Supports speech and natural language processing	Nuance, SpeechWorks, Philips Speech Processing
Interaction Media Server	Directs contact to most appropriate destination	Lucent, Genesys, Aspect, Cisco, Quintus
Customer Interaction Software (CIS)	Interacts with customers for sales force automation, help-desk customer support	CRM - Siebel, Remedy, Vantive (PeopleSoft), Clarify (Nortel), Self-Service Software (SilkNet)

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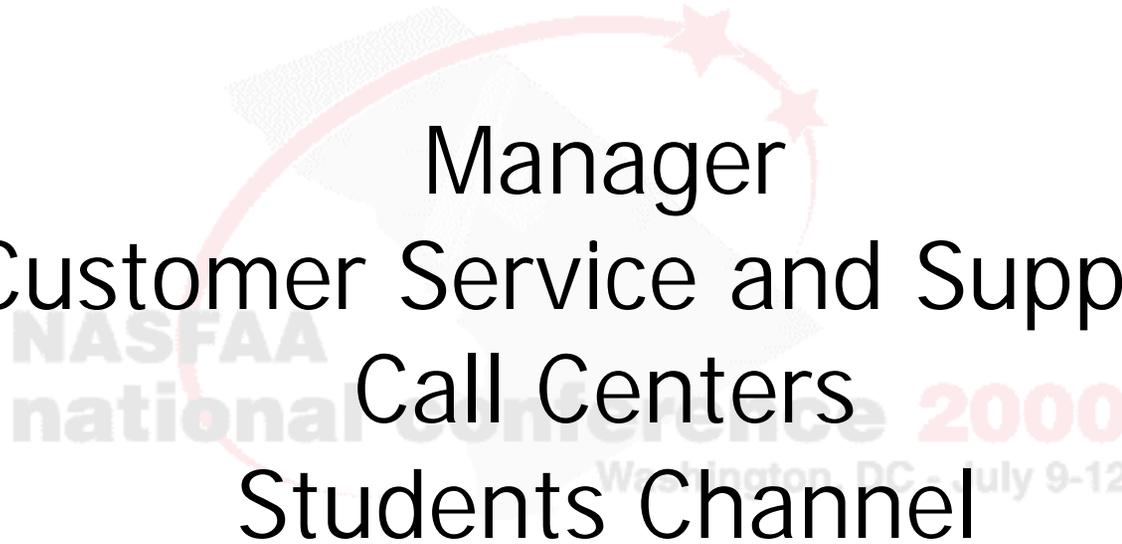
What is the Performance Scorecard?

- ★ Strategic Alignment
 - Effectiveness
 - Value Added Services
- ★ Service Delivery
 - Cycle Times
 - Delivery
- ★ Organization / People
 - Leadership Models
 - Leveraging Competencies
- ★ Process
 - Practices
 - Productivity
- ★ Technology
 - Common Platforms
 - eBusiness
 - End-User Tools

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Dena Bates

Manager
Customer Service and Support
Call Centers
Students Channel



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What are the Components of CRM at SFA?

- ★ Internet
- ★ Interactive Voice Response Unit (IVRU)
- ★ Traditional methods (Customer Service Representatives, telephone, correspondence, etc.)
- ★ Integration of voice response units with computer systems

Why is CRM Necessary at SFA?

- ★ Customer Relationship Management improves customer satisfaction
- ★ Customers expect access to data
 - When they want it
 - Where they want it
 - How they want it
- ★ Call center operations can be run more efficiently and effectively

How will CRM Affect You?

- ★ Faster access to information
- ★ Higher quality data
- ★ Better informed students

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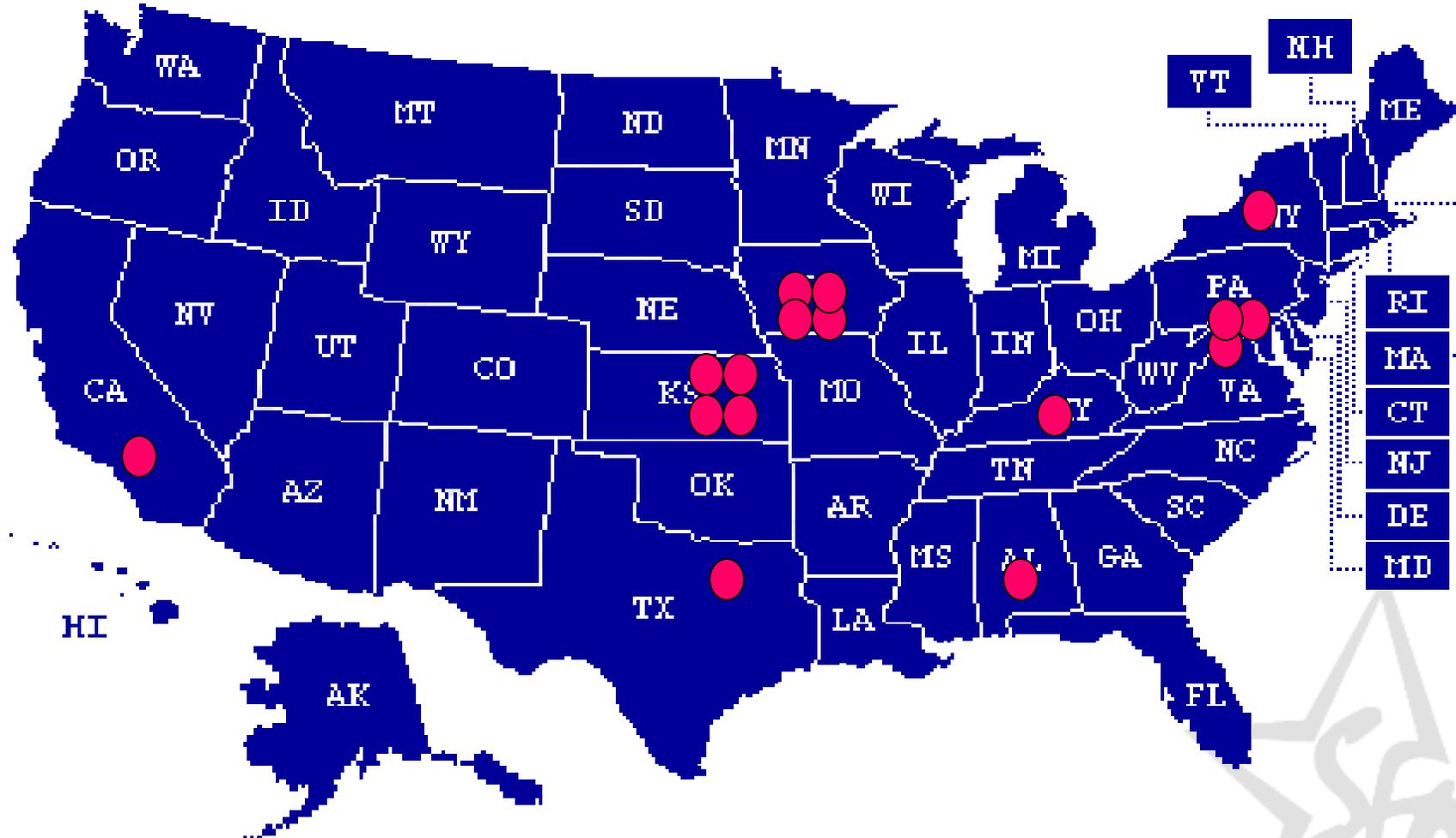
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Which Call Centers will be involved?

- ★ Customer Support Branch
- ★ Direct Loan Servicing Center
- ★ Direct Loan Consolidation Center
- ★ Federal Student Aid Information Center
- ★ CPS Customer Service Center
- ★ Debt Collection Service Information Center
- ★ Title IV (TIV WAN) Support Center
- ★ Direct Loan Origination Center - School Relations
- ★ FAFSA on the Web/ FAFSA Express
- ★ Lender or Guaranty Agency Default Rate
- ★ National Student Loan Data System
- ★ Pell Grant Customer Service Center
- ★ Ombudsman

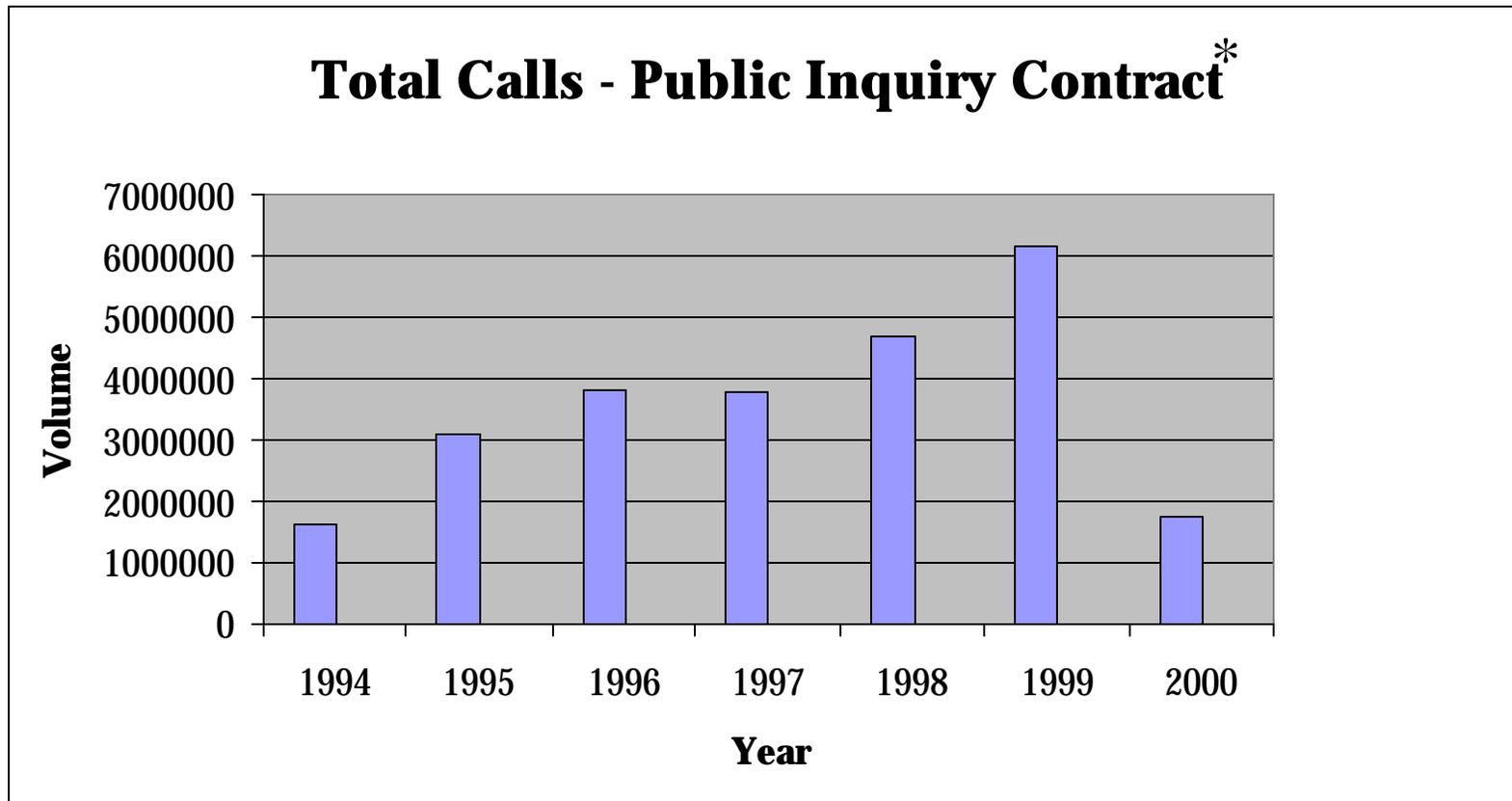
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Call Center Locations



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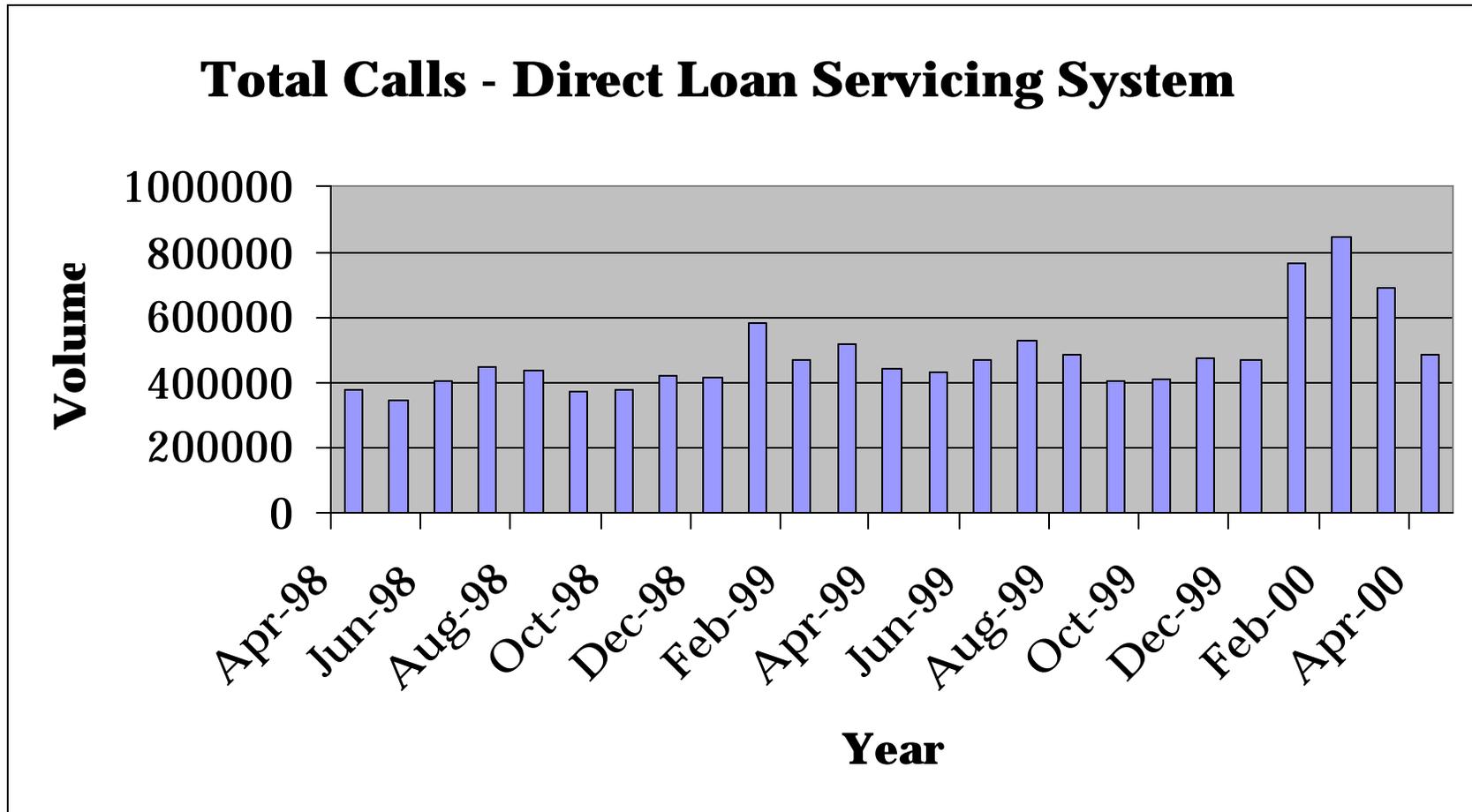
What are we doing today? - Call Centers



*Call Volume consists of 18004FEDAID, TDD, Interactive Voice, Toll Calls, Ombudsman, Debt Collection Service

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What are we doing today? - Call Centers



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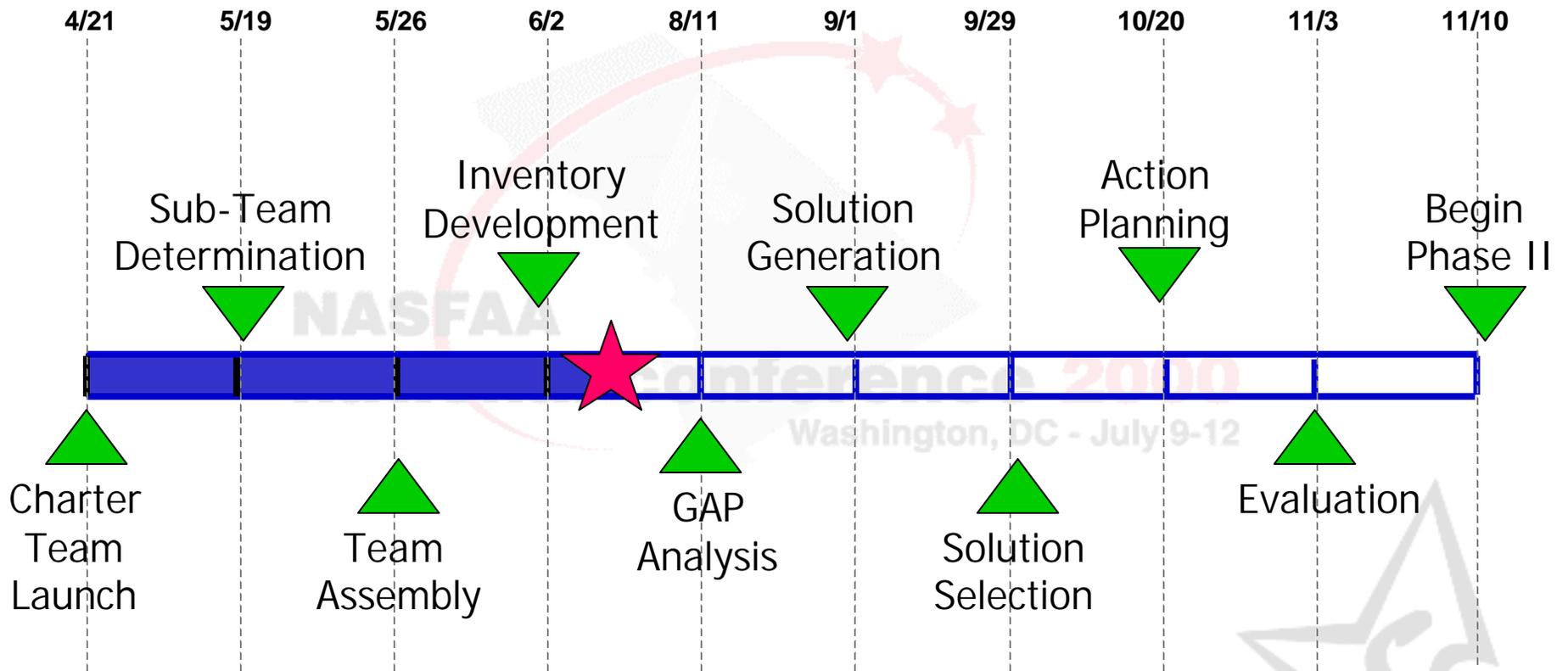
What are we doing today-on the Web?

Direct Loan Servicing System Web-Site

- ★ 14,282,200 web-site hits in April
 - 153% increase
- ★ 3,579,700 email requests in April
 - 182% increase
- ★ 45,700 loan payoffs quoted
 - 196% increase
- ★ 4,200 address changes
 - 320% increase
- ★ 1,300 Payment Due Date and Cycle Date changes
 - 1200% increase

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Where are we today?



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Next Steps of the IPT

- ★ Assessment of the current state of SFA's call center operations across all channels
- ★ Assessment of CRM best business practices
 - American Express
 - Bank of America
 - Social Security Administration
- ★ Gap analysis between our current state and the best in business
- ★ Business cases for recommended enhancements within our call centers
- ★ Implementation of Quick Hits

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Changes are already underway!

★ IVRUs are being modified to place Spanish options at the beginning of the selection list

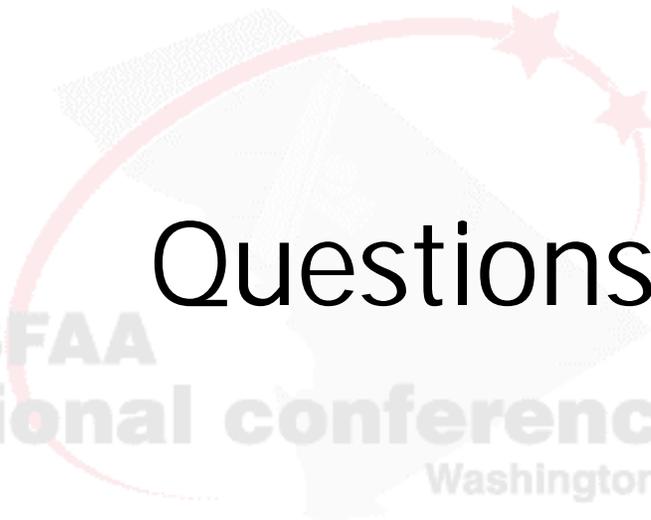
★ Improved responses for professional judgement questions

★ Reference Guide

★ "Warm Hand-Offs"

★ Email for Customer Feedback is 4fedaid_forum@ed.gov

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Questions?

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