



Session 7



1-800-4-FED-AID Top 10 Reasons Students Call

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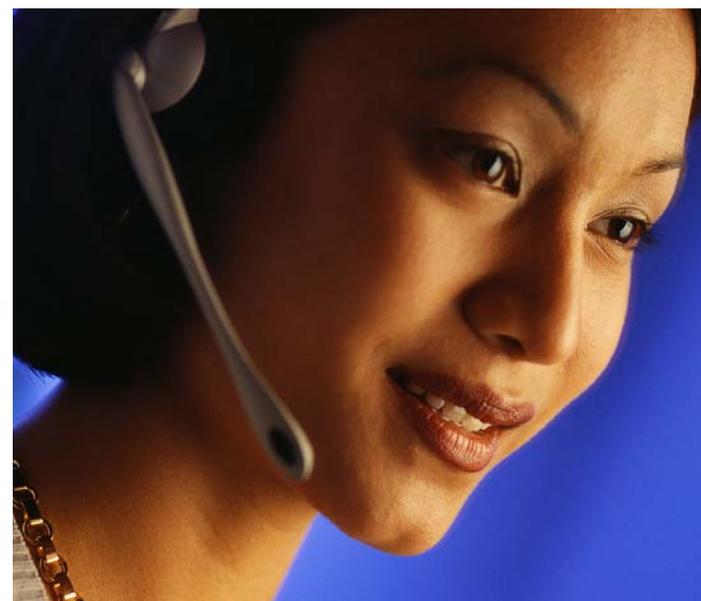


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What We Will Be Covering

- About the Federal Student Aid Information Center
- Communication Channels
- Top 10 Reasons for Calling
- Customer Interaction Options
- Performance Measures and Goals
- Commitment to Quality
- Experience Our World





Federal Student Aid Information Center

1-800-4-FED-AID



Established through the HEA, the Federal Student Aid Information Center (FSAIC) has primary responsibility for providing best in business service for the Federal Student Aid programs to ensure equal access to post-secondary educational opportunity for every individual.





Federal Student Aid Information Center

1-800-4-FED-AID

Tasked to provide timely and accurate information and services for inquiries such as:

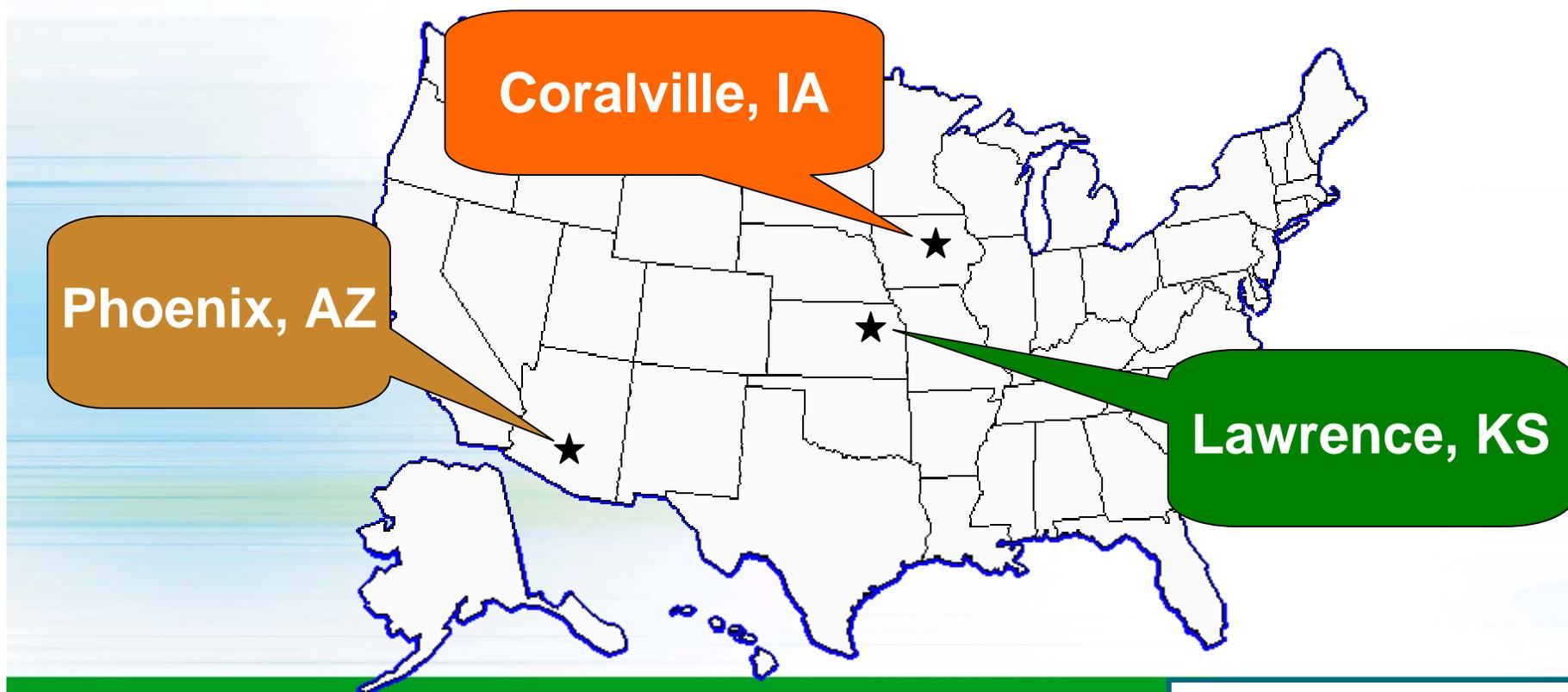
- Information about FSA programs
- FAFSA, PIN and SAR assistance
- Information on student loan history
- Publication requests
- Contact information for related entities (CSB, NSLDS, etc.)





FSAIC Locations

Load balancing between three contact centers creates a single virtual service center





Customer Service Hours of Operation

- **Monday-Friday**
8 AM – 12 Midnight
Eastern Standard Time
- **Saturday**
9 AM – 6 PM
Eastern Standard Time
- **Extended Weekend Hours**
Based on time of year and need





How We Serve Students' Needs



- Contact Center
 - 450 Customer Service Representatives
 - **8 MILLION** inquiries yearly
 - English and Spanish service
- Live help for FAFSA on the Web
 - Increased 32.5% in the last year
 - Over 160,000 contacts in 2004
- E-mail
 - Responded to over 470,000 e-mails in 2004





The Countdown: Top 10 Reasons for Calling 1-800-4-FED-AID

<i>Can you help me with ...</i>	# Calls in 2004	Percentage of Total Calls
1. FAFSA application	1,213,000	20%
2. Personal Identification Number (PIN)	773,000	13%
3. Application status check	702,000	12%
4. Student Aid Report (SAR)	529,000	9%
5. FAFSA on the Web/Renewal on the Web	488,000	8%





The Countdown: Top 10 Reasons for Calling 1-800-4-FED-AID

<i>Can you help me with ...</i>	# Calls in 2004	Percentage of Total Calls
6. National Student Loan Data System (NSLDS) inquiry	440,000	7%
7. Change of institution	387,000	7%
8. Question referred to Financial Aid Advisor	262,000	4%
9. PIN knowledge (non-technical)	125,000	2%
10. Corrections on the Web (COTW) site	96,000	2%





Call 1-800-4-FED-AID

Call Flow and Service Options

Inbound call received
by telecom system

Caller hears greetings and selects service type preference

Self-service

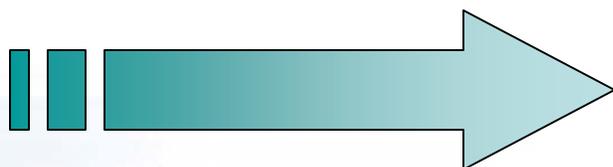
**Interactive
Voice Response
Unit (IVRU)**

CSR-assisted





Customer Interaction Options



Self-service

**Interactive Voice
Response Unit
(IVRU)**

CSR-assisted





When Calls Come into the IVRU

- Callers have several options for self-service
 - Frequently asked questions
 - Application status inquiry
 - Request duplicate SAR
- Callers may transfer to a CSR for assistance at any time

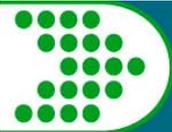




Interactive Voice Response Unit (IVRU)

- Last year 1.3 M callers selected self-service through the IVRU
- Self-service is increasingly the preferred option for many of today's generation of callers
- IVRU enhancements coming soon
 - speech recognition
 - access to loan history





Customer Interaction Options

Self-service

Interactive
Voice Response
Unit (IVRU)



CSR-assisted

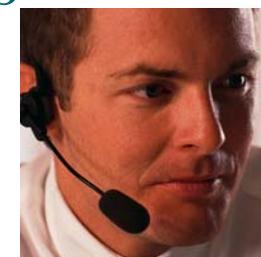




When Calls Come in for Assisted Service

Our Customer Service Representatives:

- Greet callers and assess their needs
- Request identifiers to comply with the Privacy Act
- Use resources to answer callers' questions or refer them to the correct entity
- Code the call and leave historical logs
- End the calls with the appropriate closing





Customer Service Representative (CSR) Assisted Call Volumes

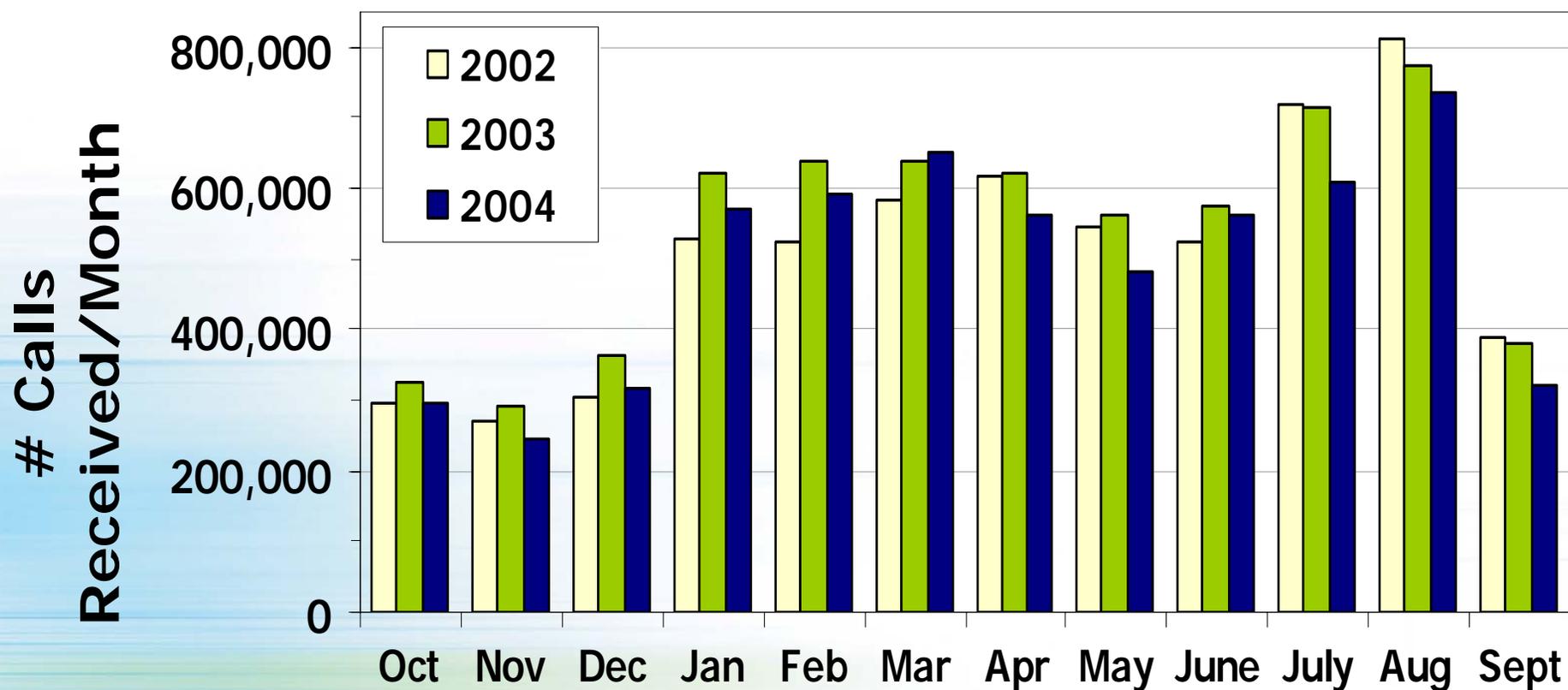
CSR-assisted service in 2004 decreased by 8.7% from the previous year

Year	CSR-assisted Total Calls
2003	6,510,000
2004	5,940,000





CSR-Assisted Call Volumes



Trend analysis used to predict staffing and other support services (telecom, servers, staff needs)





Performance Measures and Goals

Call Completion Rate

Measure: Percentage of calls answered after callers select CSR service option

Goal: 98%

Speed of Answer

Measure: Percentage of calls answered within 20 seconds

Goal: 80%

Customer Satisfaction

Measure: Percentage of calls ranked four or higher on a five-point scale in customer satisfaction surveys

Goal: 85%

Quality of Response

Measure: Percentage of accurate and consistent responses

Goal: 95%





Our Call Completion Rates

Our goal is to complete at least 98% of all calls

Year	Average Call Completion Rate
2004	99%
2003	99%
2002	96%



We met or exceeded our goals for successful call completion in every month of 2004

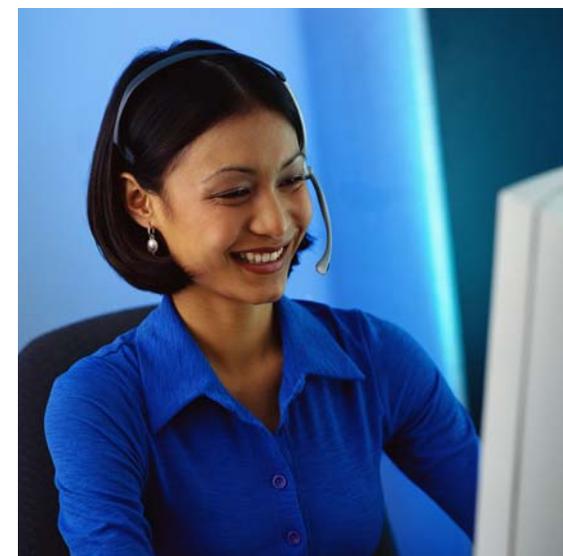




Our Speed of Answer

Our goal is to answer at least 80% of all calls within 20 seconds

Year	% Calls Answered within 20 Sec
2004	93%
2003	89%
2002	81%

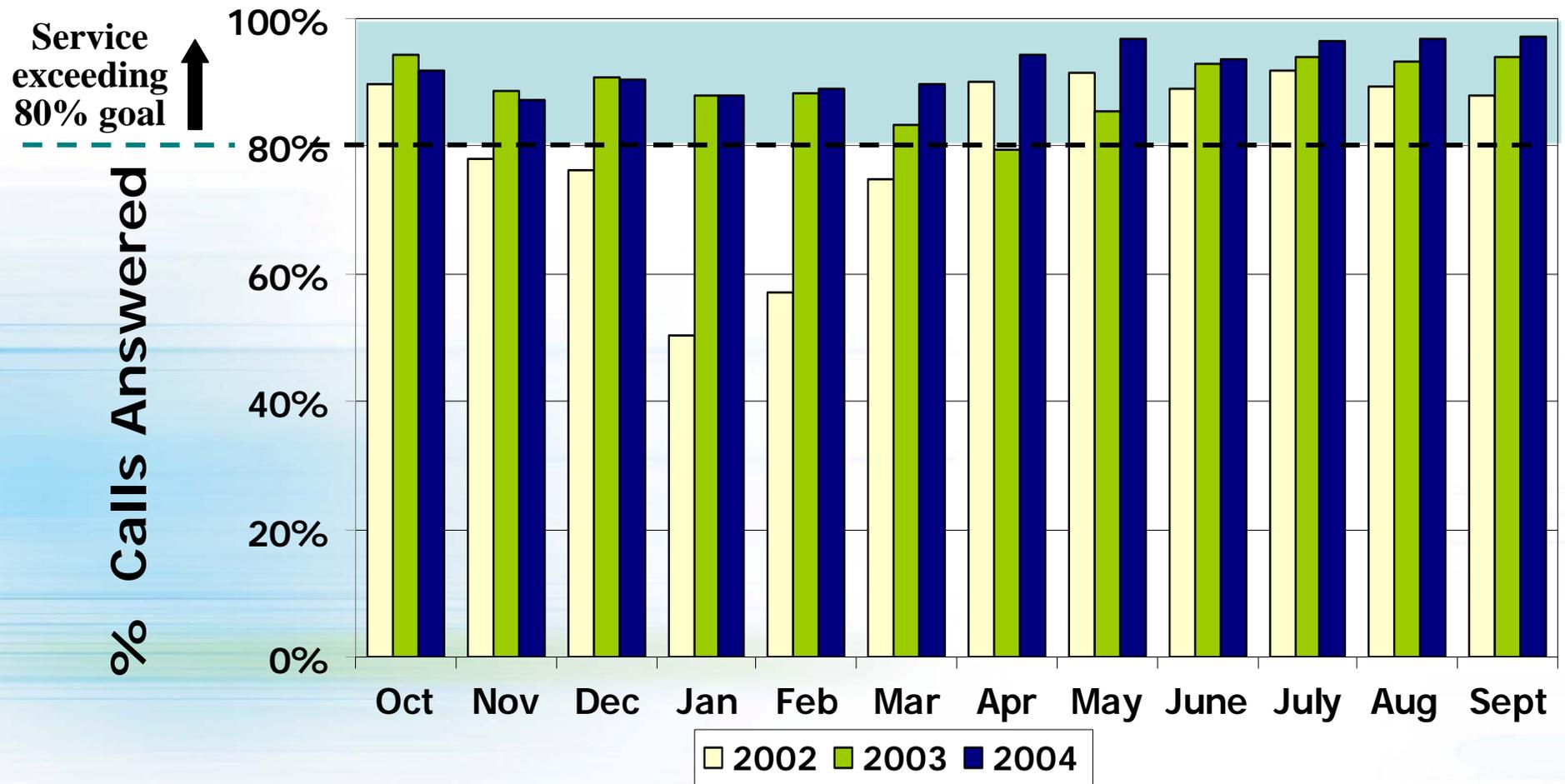


We exceeded our goals for answering calls in a timely manner for every month in 2004





Calls Answered Within 20 Seconds





Customer Satisfaction Survey

Our goal is to receive four or higher on a five-point scale in 85% of customer satisfaction surveys

Year	% Satisfaction Surveys Rated Four or Higher
2004	90%
2003	90%
2002	89%



- We exceeded our goals for customer satisfaction for every month in 2004*
- Implementing more robust survey tools*





Ongoing Feedback & Continuous Improvement

- FSAIC survey
- American Customer Satisfaction Index (ACSI)
- Customer comments
- Conferences
- Focus groups
- Employees
 - CSR focus groups
 - Input to managers
- Other federal agencies



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Quality of Call Response

Our quality goal is to provide complete and correct responses in at least 95% of monitored calls

Year	% Correct Responses during Monitoring
2004	99.7%
2003	99.6%
2002	99.5%

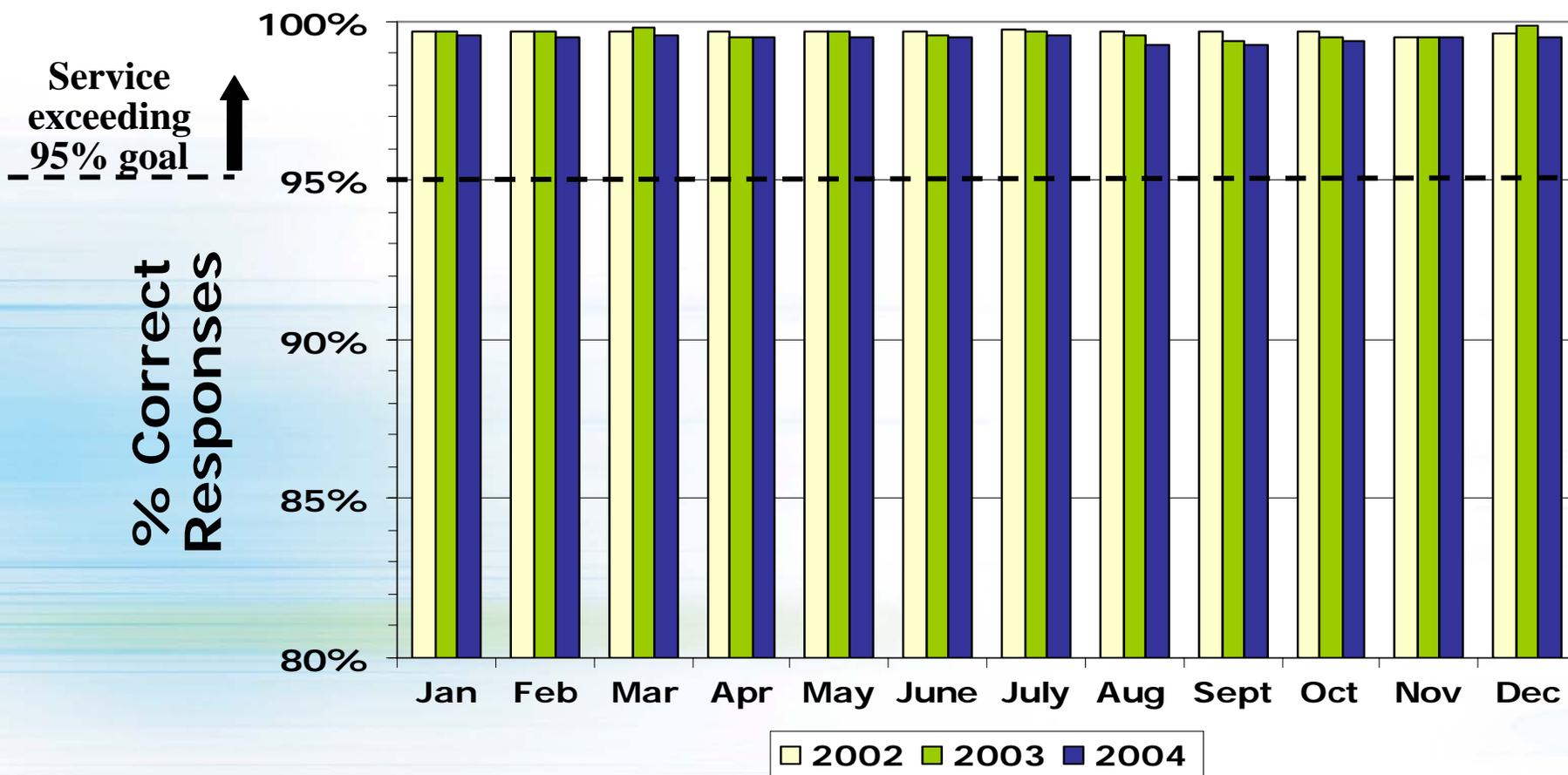


We exceeded our goals for quality of response every month in 2004 as measured by call monitoring



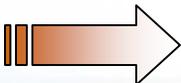
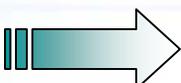


Quality of Call Response





Customer Service Expectations

Customer Service Attribute	Examples
Phone and people skills 	<ul style="list-style-type: none">• Tone• Grammar• Attitude
Adherence to required procedures 	<ul style="list-style-type: none">• Standard greeting• Privacy Act• Standard responses
Problem solving skills and knowledge 	<ul style="list-style-type: none">• Probing questions• Clear resolutions• Appropriate options
General call expectations 	<ul style="list-style-type: none">• Verify school year• Verify address• Create phone log





Our Commitment to Quality Call Monitoring

- Peer monitoring
- Joint monitoring sessions with staff and management
- Calibration between contact centers ensures consistency
- 1% of FSAIC calls
- Scorecard





Our Commitment to Quality Call Monitoring

- Methods
 - in-person
 - remote
 - recorded calls
- Results
 - quality control
 - feedback, coaching and counseling
 - evaluation of CSR support mechanisms

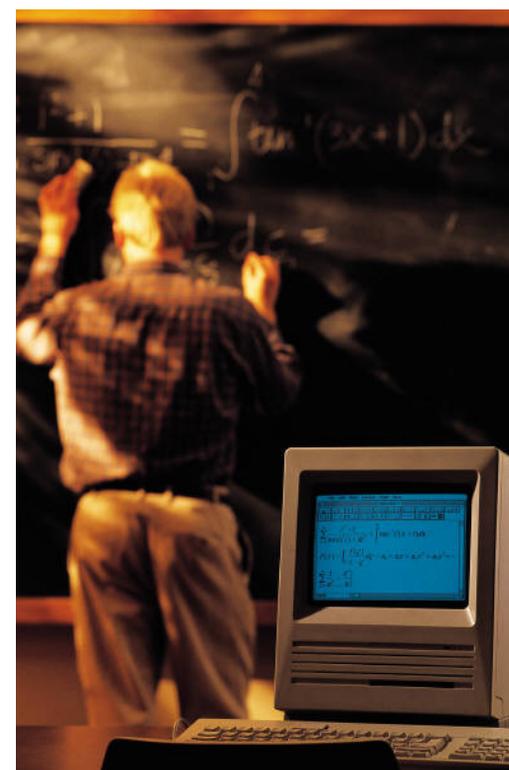




Emphasis on Training

Our Commitment to Quality

- Train-the-trainer
- Initial employee training
- Refresher training
- Annual update training
- Annual in-service
- Supervisor training



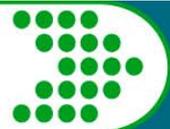


Contact Us

We appreciate your feedback and comments.

- Michele Brown
 - Phone: 202-377-3203
 - Email: michele.brown@ed.gov
- Rebecca Alcorn
 - Phone: 202-377-3275
 - Email: rebecca.alcorn@ed.gov
- Victor Janey
 - Phone: 319-665-7633
 - Email: victor.janey@pearson.com



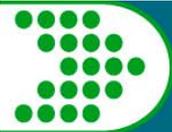


Experience Our World

Recorded Calls and Discussion

- Phoenix Contact Center
 - Michele Barreras
- Coralville Contact Center
 - Kenton Stolley
- Lawrence Contact Center
 - Mark Lohrenz



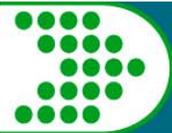


Experience Our World

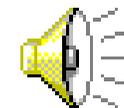
Recorded Calls and Discussion

- Phoenix Contact Center
LaToya Walker
- Coralville Contact Center
Victoria Solomon
- Lawrence Contact Center
Lynda Riley





Experience Our World Recorded Calls and Discussion



You sent back a green copy of my SAR ...it says - you must give us more information to calculate my EFC...

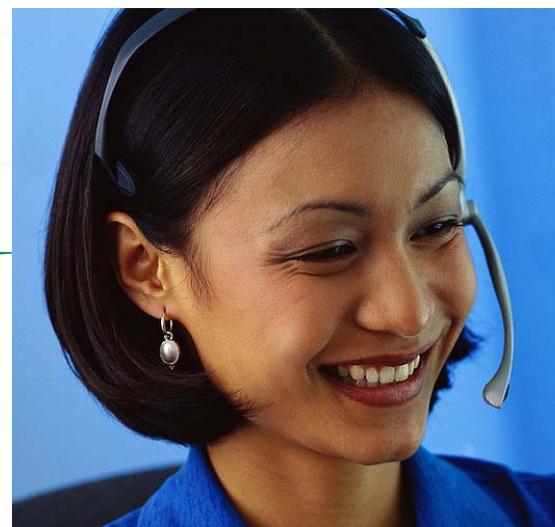


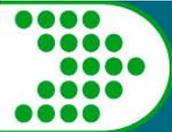


Experience Our World Recorded Calls and Discussion



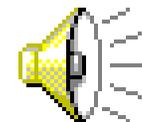
I am confused. When I got married in 2000, I never switched my Social Security card over...





Experience Our World

Recorded Calls and Discussion



I am an enrollment counselor...we ran into a challenge on her FAFSA application ... the AGI...

