Customer Relationship Management / Call Centers
Integrated Product Team

NASFAA Conference
July 9, 2000
4:00 - 5:15 pm

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Introduction

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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
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
Denise Hill

Senior Architect
Chief Information Officer (CIO)
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.

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What is Needed to Implement a successful CRM Solution?

★ Qualified professional people
★ Well-designed processes
★ Leading-edge technology
★ Input and cooperation from various stakeholders
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”
# What are some CRM Best Practices?

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

Total Calls - Public Inquiry Contract*

*Call Volume consists of 18004FED, TDD, Interactive Voice, Toll Calls, Ombudsman, Debt Collection Service
What are we doing today? - Call Centers

Total Calls - Direct Loan Servicing System

Volume

Year

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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
Where are we today?

4/21 Sub-Team Determination
5/19 Inventory Development
5/26 Solution Generation
6/2 Action Planning
8/11 Charter Team Launch
9/1 Team Assembly
9/29 GAP Analysis
10/20 Solution Selection
11/3 Evaluation
11/10 Begin Phase II

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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
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
Questions?

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