



Financial Services Division Customer Service Standards

Touch Point Communications	Purpose: To provide consistency in telephone calls and emails		
<p>Telephone</p> <ol style="list-style-type: none"> 1. Answer calls promptly; avoid calls rolling over to voicemail. 2. Answer with a formal greeting. 3. Listen and repeat caller's request. 4. Allow callers to express their concerns without interrupting. 5. Inform caller of the extension and contact person's name when transferring. 6. Take messages when needed. 	<ol style="list-style-type: none"> 7. Ask callers if there is anything else you may assist them with and thank them for calling. 8. Return calls within 24 hours. 9. Maintain confidentiality and privacy. 	<p>Emails</p> <ol style="list-style-type: none"> 1. Return emails within 24 hours. 2. Encourage employees to use auto-reply feature in email when they are going to be unavailable for more than a day. The email should contain contact information for someone else for assistance. 3. Proofread all responses for spelling, grammar, clarity, completeness, and comprehension. 4. Include your contact information (signature) on new emails. 5. Maintain confidentiality and privacy. 	

Difficult Situations	Purpose: To help work through difficult situations with customers		
<ol style="list-style-type: none"> 1. Allow customers to express their concerns by listening before speaking. 2. Don't argue with the customer and maintain a professional demeanor. 	<ol style="list-style-type: none"> 3. Empathize with the customer. 4. Repeat and rephrase to make sure you understand the problem the customer may be having. 	<ol style="list-style-type: none"> 5. If you can't reach a resolution with the customer, escalate the matter to another level of authority. 6. Focus on options and alternatives. 7. Maintain confidentiality and privacy. 	

Colleagues as Customers	Purpose: To ensure appropriate discourse between colleagues and internal customers.
<ol style="list-style-type: none"> 1. Remember that students and staff are customers, too. 2. Speak respectfully to each other. 3. Remain courteous and respectful. 4. Treat each other the way you would want to be treated. 5. Maintain confidentiality and privacy. 	

Walk-Ins & Visitors	Purpose: To ensure a welcoming environment for all customers
<ol style="list-style-type: none"> 1. Greet each visitor with a smile. 2. Use a positive and professional greeting. 3. Treat all customers with respect and dignity. 4. Always remain courteous. 5. Maintain eye contact with customers. 6. Give visitors specific directions when referring them to other locations. 7. Treat each other the way you would want to be treated. 8. Maintain confidentiality and privacy. 	