



CONFERENCE

OUT OF THE BOX: CUSTOMER SERVICE TRAINING FOR HIGHER EDUCATION

March 18-20, 2013
Dallas, TX



ai ACADEMIC
IMPRESSIONS



OVERVIEW

The interactions a student has with your admissions staff, accounts office, bursar, financial aid counselors, registrar, student services division, and other front-line staff members are crucial to engagement and retention. This conference is designed especially for managers and team members working in any of these areas who want to learn ways to improve customer service for students and parents over the phone, in person, and by email.

Through a mix of instructive, interactive, and working sessions, our expert instructors will help you better understand:

- The four service standards that matter most: comprehensive responsiveness, efficiency, listening and clear communication, and empathy and conflict management
- What your leadership style is and how to deal with conflict based on your style
- Techniques for managing angry or frustrated customers
- Methods for de-escalating conversations and not getting pulled into emotional confrontations

LEARNING OUTCOME

After participating in this program, you will be able to use an out-of-the-box customer service training with your own staff on campus.

WHO SHOULD ATTEND

Managers and training leads in enrollment management related offices (financial aid, bursar, admissions, card offices) and other student services. Front line employees delivering customer service to students and parents in any of these offices should also attend.

CUSTOMER SERVICE TOOL KIT

Included with your registration is a toolkit of training materials and activities you can share with the rest of your team. As you go through these activities during the course of the conference, you will learn how to facilitate customer service training as part of new staff development, as an annual training refresher, or as individual modules used whenever needed.



See the conference agenda for more details about the content of the training toolkit.

*Join us for
a train-the-
trainer event
designed
to improve
customer
service for all of
your front-line
staff.*



**Attend as a
Team and Save!**

We know that critical issues and challenges require the input and support of many campus stakeholders. To help make it possible for your team to attend, for every two registrants that pay full price, the third registrant is 50% off!



AGENDA

MONDAY, MARCH 18, 2013

12:00 - 1:00 p.m. Conference registration

1:00 - 1:30 p.m. Opening comments

1:30 - 2:30 p.m. Service Standards

Customer service draws on a variety of areas and competencies. This out-of-the-box customer service training focuses on building the following skill areas:

- Comprehensive responsiveness
- Efficiency
- Listening and clear communication
- Empathy and conflict management

In this session, we will offer an orientation to the training and define the specific learning outcomes of the training within each skill area.



Training Kit items:

- Self test - Pre-assessment of skills test sheet
- List of service standards addressed in each module
- Service scorecards for staff members

2:30 - 2:45 p.m. Afternoon break

2:45 - 4:00 p.m. In the Shoes of the Customer

Students today have elevated expectations around wait/call times, technology, and treatment in customer service, and those expectations are not curtailed when they set foot on campus, visit an institution's website, or seek one-on-one assistance. In this exercise, you will draw on your own customer service experiences and expectations to outline what expectations and needs customers have, and together we will develop an initial list of customer service needs. This orientation to customer expectations and experiences will drive the rest of the course.



Training Kit items:

- Facilitation guide for this activity
- Examples of service experiences
- Examples of expectations



AGENDA

MONDAY, MARCH 18, 2013 (CONTINUED)

4:00 - 4:45 p.m.

Identifying Your Communication Strengths and Weaknesses

So much of what happens with the customer experience is transactional - that is two parties are bringing something to the conversation or meeting. Experienced customer service representatives know that they can't control what the other person brings to the table, but they can manage and adapt how they respond to it by understanding themselves first. In this exercise, participants will identify their thinking and communication preferences and those of others and begin to develop strategies to better work with student-customers with a diversity of communication and thinking styles.



Training Kit items:

- Facilitation guide for this activity
- Assessment tools
- Activity instructions

4:45 - 5:15 p.m.

Training Check-in

At the end of day one, we will use this discussion to identify the meta-training techniques that are essential in guiding the training and specifically the day one activities.

5:30 - 6:30 p.m.

Networking reception (included in registration fee)

TUESDAY MARCH 19, 2013

8:00 - 9:00 a.m.

Continental breakfast (included in registration fee) roundtable

While you enjoy breakfast, visit with others that do similar work to discuss information shared during the conference.

9:00 - 10:00 a.m.

Conversation Cycle

Good customer service providers generally ask you, "Is there anything else I can help you with?" before ending a conversation. This technique is a part of an intentional conversation cycle. In this session, you will learn and practice techniques in the conversation cycle to improve your customer service communications verbally and online.



Training Kit items:

- Facilitation guide for this activity
- Sample script
- Conversation cycle descriptions
- Conversation topics list
- Powerpoint slides to introduce each part of the conversation cycle



AGENDA

TUESDAY MARCH 19, 2013 (CONTINUED)

10:00 - 10:45 a.m.

Do's and Don'ts on the Frontline

Within the customer service conversation cycle, there are specific phrases to avoid, and certain language that you should use to clearly and efficiently provide customer service. In this session, participants will watch a series of role played interactions and identify the best practices and pitfalls in those interactions as a group.



Training Kit items:

- Facilitation guide for this activity
- Role play script
- List of forbidden phrases and replacement phrases, including a job aid
- Powerpoint slides to introduce the phrases

10:45 - 11:00 a.m.

Morning break

11:00 a.m. - 12:30 p.m. **Dealing with Difficult Customers**

Although hopefully it doesn't happen that often, one of the most challenging aspects of customer service is dealing with difficult customers, including those who are concerned, upset, angry, and/or frustrated. In this session, you will learn techniques for conflict management and addressing difficult situations. You will then be confronted with several scenarios with a variety of difficult customers, where you will apply the skills learned to resolve the situation and provide excellent and appropriate customer service.



Training Kit items:

- Facilitation guide for this activity
- Practice scenarios
- Best practices for diffusing difficult scenarios resource

12:30 - 1:45 p.m.

Lunch (included in registration fee)

1:45 - 2:15 p.m.

Training Check-in

In this second check-in, we will use the discussion to identify the meta-training techniques that are essential in guiding the training and specifically the day two activities and answer any questions you have about facilitating the training on your campus.

2:15 - 2:30 p.m.

Afternoon break



AGENDA

TUESDAY MARCH 19, 2013 (CONTINUED)

2:30 - 4:00 p.m.

Speed and Efficiency

During this session, you will learn techniques for handling customer service interactions quickly and efficiently. You will then work with a partner to practice handling customer service interactions quickly and efficiently and offer and accept feedback on where you can improve. The sessions will close with the group as a whole identifying a list of best practices that developed in the exercise and feedback.



Training Kit items:

- Facilitation guide for this activity
- Cards with roles for simulation
- Technique definition resource
- Feedback worksheet

4:00 - 4:30 p.m.

Simulation Preparation

The simulation in day three is the capstone of the customer service training and will serve to give you an individual assessment of your customer service skills in the identified areas. During this time, you will have time to ask questions about the skills covered in the training and will receive guidance on how to prepare for the simulation.

WEDNESDAY, MARCH 20, 2013

8:00 - 9:00 a.m.

Continental breakfast (included in registration fee) roundtable

While you enjoy breakfast, visit with others who do similar work to discuss information shared during the conference

9:00 - 10:45 a.m.

Simulation

In this simulation, you will work with a small group of your colleagues to put all of the skills covered in the training to use. You will be asked to role play different customer service scenarios and to apply the best practices and techniques you have learned. You will be assessed in the skill areas identified by your colleagues, and will in turn, assess and offer feedback to fellow participants as they also apply the skills learned.



Training Kit items:

- Facilitation guide for this activity
- Simulation scenarios
- Assessment tool
- Game to help you practice

10:45 - 11:00 a.m.

Morning break



AGENDA

WEDNESDAY MARCH 20, 2013 (CONTINUED)

11:00 - 11:30 a.m.

Self-Improvement Planning

As mentioned, during the simulation, your colleagues will assess your performance in the various skill areas and you will receive a scorecard on your performance with areas of strength and recommendations for improvement. Based on your scorecard, you will use this time to develop a self-improvement plan to continue building your customer service skills in the following months.



Training Kit items:

- Facilitation guide for this activity
- Scorecard worksheet
- Self-improvement plan template

11:30 a.m. - 12:00 p.m.

Final Training Check-in

The self-improvement planning is the last module in the out-of-the-box training. In this final check-in, you will reflect on the experience and identify how you will implement the training back on your campus. You will be encouraged to ask any remaining questions of the facilitators.

12:00 - 1:15 p.m.

Lunch for post- conference workshop attendees (included in workshop registration fee)

OPTIONAL POST-CONFERENCE WORKSHOP

1:15 - 4:15 p.m.

Optional Post-Conference Workshop: Customer Service Metrics

Customer Service is more than just front-line interactions. Your systems, data, and office culture all have an impact on the customer experience. The trouble is that when it comes to customer service, most shops aren't sure where they're doing well, where they're falling down, and why. In this post-conference workshop, you will be guided through a process and techniques for assessing your shop in terms of customer service, including: key metrics, how to gather them, analyze them, and make decisions based on them. You will leave with a high-level customer-service assessment plan for your shop.



INSTRUCTORS



SUSAN LEIGH / Associate Vice President, Enrollment Management and Marketing

DePaul University

Susan Leigh joined DePaul University in 1992. With more than 30 years in higher education, as a faculty member and as an administrator, Susan oversees Student Records, which is responsible for all academic enrollment records, placement testing, registration, grading, graduation, transcripts, diplomas, immunization and advising reports such as the course history and degree progress reports. She is also responsible for DePaul Central, comprised of two in-person offices and one contact center that offer one-stop integrated services for student records, financial aid, and student account services. Susan presents frequently on topics related to one-stop development and customer service in higher education.



JULIE A. SELANDER / Director, One Stop Student Services Office and University Veterans Services

University of Minnesota

Julie Selander has worked in higher education administration and finance for over 24 years. Prior to Julie’s current role as the director of the one stop student services office and university veterans services at the University of Minnesota, she collaborated with her colleagues to develop the “One Stop” model, providing seamless and integrated student services in the areas of enrollment, registration, financial aid, billing, and student accounts receivable. She is also a part-time instructor in the organizational leadership, policy, and development department at the University of Minnesota and has taught strategic customer relationship management and customer service training for the past three years.

Julie presents frequently on various topics related to higher education student services and has written several articles for publication, including a chapter for NACUBO’s *Student-Centered Financial Services: Innovations That Succeed*. Julie has also consulted with other colleges and universities assisting them with realizing their goals related to organizational development and planning for an integrated student services model and customer service training for student services professionals.

TESTIMONIALS

“The Academic Impressions team helped me to create an excellent model for me to take back to my campus.”

-Lori Schoonmaker, Interim Associate Director, Recruitment, Fairmont State University

“Great presenters and content was delivered in a fun environment. I am excited to return and share the information with my colleagues!”

-Christina Wilson, Program Coordinator, Northern Arizona University



HOTEL RESERVATIONS

The conference will be held at:

The Westin Galleria Dallas
13340 Dallas Parkway
Dallas, TX 75240



To reserve your room, call 1-888-627-8536. Please indicate that you are with the Academic Impressions group to receive the room rate of \$159 for single or double occupancy, plus applicable tax.

A room block has been reserved for the nights of March 17 - 19, 2013. Reservations must be made by February 25, 2013. There are a limited number of rooms available at the conference rate. Please make your reservations early.

The Westin Galleria Dallas is connected to the lavish Galleria Complex which features a variety of dining, shopping, and entertainment.

The hotel is located just 20 minutes from Dallas/Fort Worth International Airport (DFW), which serves 135 domestic markets and 38 international markets. Close to downtown and just 15 minutes from the hotel, Dallas Love Field (DAL) is home to Southwest Airlines, offering over 130 direct and connecting flights daily to destinations across the country. In addition to Southwest, Continental Express and American Airlines also serve the airport.

LOVE FIELD (DAL)

Travel Distance: Approximately 14.48 km/9.0 miles

Options for getting to and from the hotel include:

- Taxi
 - Fee: \$45; Fee is estimate and does not include gratuity.
- GO Yellow Checker
 - Fee: \$17 one way
 - Contact: (214) 841-1900
 - Reservations are recommended, though unreserved vans are available in the ground transportation areas.

DALLAS/FT. WORTH INTERNATIONAL AIRPORT (DFW)

Travel Distance: Approximately 28.97 km/18.0 miles

Options for getting to and from the hotel include:

- Taxi
 - Fee: \$55; Fee amount is approximate and does not include gratuity. Actual fee will depend on the departure point/terminal.
 - Travel Time: 18 - 20 minutes
- GO Yellow Checker
 - Fee: \$17 one way
 - Contact: (214) 841-1900
 - Reservations are recommended, though unreserved vans are available in the ground transportation areas.



PLEASE FAX ALL REGISTRATION PAGES TO: 303.221.2259

Questions about the event? Call us at 720.488.6800 to help determine if this event is right for you.

Register online at www.academicimpressions.com

REGISTRATION FEES

Your registration fee includes: Full access to all conference sessions and materials, access to the networking reception on Monday, breakfast and lunch on Tuesday, and breakfast on Wednesday, as well as refreshments and snacks throughout the conference.



Out of the Box Customer Service Training Kit - \$500

__ # of kits

Best Value

Conference + Post-Conference Workshop - \$1395 USD

__ # of attendees

Total _____

Conference

Conference only - \$1095 USD

__ # of attendees

Total _____

Workshop

Post-Conference Workshop only - \$395 USD

__ # of attendees

Total _____



ATTEND AS A TEAM - remember, if you register as a group, every third registrant is 50% off.

EARLY BIRD PRICING

Postmarked on or before March 1, 2013. For registrations postmarked after March 1, 2013, an additional \$100 fee per registrant applies.

REFUND/CANCELLATION POLICY

Refunds will be issued only if cancellations are received in writing by December 21, 2012 . A \$100 processing fee will be assessed. After December 21, 2012 a credit (less \$100 processing fee) will be issued. The credit will be valid for 12 months and can be used toward any future conferences, Web conferences, audio proceedings, or Web conference archives. In case this event is cancelled, Academic Impressions' liability is limited to a refund of this registration fee only.

By submitting this registration form, you agree to the terms and conditions of the above cancellation policy.

Visit our website to register online:

<http://www.academicimpressions.com/conference/out-box-customer-service-training-higher-education>



ACADEMIC IMPRESSIONS CANCELLATION AND REFUND POLICIES



SATISFACTION PROMISE

We want you to be satisfied with your Academic Impressions learning experience. If the program you purchased fails to meet your expectations, please contact us within 30 days and let us know. We'll credit the full amount you paid toward another AI program that may better fit your needs.

CONFERENCES

For in-person conferences, substitute registrants are welcome and may be named free of charge at any time. If you cancel 8 weeks or more prior to the first date of the conference, you will receive a full refund, less a \$100.00 service charge per attendee.

If you cancel within 8 weeks of the first date of the conference, you are not entitled to a refund. However, as a courtesy, we will allow you to apply your payment, less the service charge, toward a future purchase within one year from the date you cancel. Your payment is transferable to another person from your institution if you wish.

Please note that if you do not attend and you do not contact us in advance to cancel as described above, you are responsible for the entire payment. In case this event is cancelled, Academic Impressions' liability is limited to a refund of the registration fee only.

WEBCASTS

For webcasts, substitute registrants are welcome and may be named free of charge at any time prior to the day of the webcast. You may also switch your webcast order from a live connection to an on-demand download or CD recording (and vice versa) at no additional cost (shipping charges will apply to CD Recording orders outside the U.S. or Canada).

If you cancel 8 weeks or more prior to the webcast date, you will receive a full refund, less a \$75.00 service charge. If you cancel within 8 weeks of the webcast date, you are not entitled to a refund. However, as a courtesy, we will allow you to apply your payment, less the service charge, toward a future purchase within one year from the date you cancel. Your payment is transferable to another person from your institution if you wish.

Please note that if you do not login to view the webcast and you do not contact us in advance to cancel as described above, you are responsible for the entire payment. In case this event is cancelled, Academic Impressions' liability is limited to a refund of the registration fee only.

RECORDINGS, ON-DEMAND DOWNLOADS, MONOGRAPHS AND OTHER PUBLICATIONS

All sales are final. No cancellations or refunds provided.



PLEASE FAX ALL REGISTRATION PAGES TO: 303.221.2259

CONFERENCE REGISTRATION INFORMATION

Print Name

Job Title

Institution/Organization

What name do you prefer on your name badge?

Address

City

State/Province

Zip/Postal Code

Country

Telephone

Email

IF THIS CONFERENCE PARTICIPANT HAS ANY DIETARY OR ACCESSIBILITY NEEDS, PLEASE LIST THEM IN THE SPACE BELOW. WE WILL DO OUR BEST TO ACCOMMODATE THESE NEEDS.

How did you hear about this event? (email from AI, colleague forwarded email, *The Chronicle*, etc.) _____

If you would like us to send a copy of your registration confirmation or receipt to someone else, please complete this section

ADDITIONAL CONTACT INFORMATION

Additional Contact Name

Contact Phone

Additional Contact Email

Additional Contact Title

EMERGENCY CONTACT INFORMATION

Emergency Contact Name

Emergency Contact Phone



PLEASE FAX ALL REGISTRATION PAGES TO: 303.221.2259

PAYMENT METHOD

We accept Visa, MasterCard, and American Express credit cards. To pay by check, include the check with this form or select the "invoice me" option. Fax form to 303.221.2259 or mail form along with payment to: Academic Impressions, 4601 DTC Blvd., Ste. 800, Denver, CO 80237

CREDIT CARD



Name on Card		Account Number	
Billing Address		Billing City	Billing State
Billing Zip Code/Postal Code	Exp. Date	Security Code (last 3 digits on the back of Visa and MC or 4 digits on front of AmEx)	



Remember, if you register as a group, every third registrant is 50%

AMOUNT TO CHARGE: _____

CHECK/INVOICE

- My check is included and covers _____ registration(s) Check # _____
- Please invoice me, Purchase Order # _____ (PO # not required to receive invoice)



FREE HIGHER ED NEWS AND ANALYSIS

Each conference registration includes a subscription to *Higher Ed Impact*, a free industry scan of news, trends, and research on higher education, delivered in an easy-to-scan email. *Higher Ed Impact* (HEI) includes:
(Check the boxes for the editions you would like to sign up for)

- HEI: Daily Pulse** - impactful news, trends, and practices, sent daily
- HEI: Weekly Scan** - the week's most critical news, with analysis of top stories and trends, sent on Fridays
- HEI: Monthly Diagnostic** - practical takeaways addressing a strategic challenge facing institutions of higher ed, sent 9-12 times/year

List the names of the registrants you'd like to sign up:

Note if you do not provide any names in the above space, all attendees will be signed up for the options selected.