



CONFERENCE

# ReENVISION CUSTOMER SERVICE: CERTIFICATION TRAINING FOR HIGHER EDUCATION PROFESSIONALS

October 13 - 15, 2014  
Denver, CO



**ai** ACADEMIC  
IMPRESSIONS



*Get certified to show you can provide professional service that keeps students loyal.*

## OVERVIEW

Delivering great student service has become a competitive advantage and expectation for colleges and universities. Students who don't have a seamless experience on your campus vote with their feet and leave for institutions that have made investments in student systems and staff training.

Re-envision the service excellence you can provide by training of your front-line service professionals to meet today's students demands for efficiency and accuracy.



### GET YOUR CERTIFICATION

Throughout this program, there are a series of skill assessments that measure your proficiency in the customer service skills being taught. Full participation and successful completion of each customer service module is required for certification. The certification process will be rigorous, and more than simple seat time is required, but the rewards will prove invaluable to you!

This event will provide you personal and professional skill and resume building. You will walk away with the certificate that proves you have a personal tool kit and the confidence of a truly trained customer service expert. This is the only higher education customer service certification of its kind.

#### Certification Learning Outcomes:

- Service skills and demonstrated proficiencies
- Critical thinking for service triage efficiency
- Intercultural and intergenerational impacts
- FERPA's role in student service
- Professional Core Competencies
- Efficiency as Speed vs. accuracy

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<http://www.academicimpressions.com/conference/reenvision-customer-service-certification-training-higher-education-professionals-october-2014>



## GET YOUR TEAM CERTIFIED

Show that your campus is a leader in customer service. Certification training replaces outdated mental models of who our students are with SEM (Strategic Enrollment Management) infused core concepts of who our students can become with our support. Managers and front-line staff in enrollment management and other student service office can learn together to improve customer service, and then bring it back to your institution. They become your on campus leadership team for student service improvement!

Get your entire front-line staff certified. To encourage team participation, when you **send 2 staff members a 3rd can attend for 50% off**. If you have more than three staff members who need to be certified, call Marla Whipple at **720-988-1218** to talk about additional team discounts.

## SUGGESTED READING

### [Improving Customer Service in Higher Education](#)

We asked past and current presidents, vice presidents, and department heads in student services and enrollment management to speak to the major barriers to improving customer service and how these barriers can best be addressed.

## LEARNING OUTCOME

After participating in this conference and certification, you will be prepared to provide customer service to all stakeholders while supporting your students in their enrollment goals.

## CONTACT US FOR MORE INFORMATION

Contact **Marla P. Whipple**, Senior Conference Director at [marla@academicimpressions.com](mailto:marla@academicimpressions.com) or 720-988-1213 if you'd like additional information about the program.

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# AGENDA

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MONDAY, OCTOBER 13, 2014

- 12:30 - 1:00 p.m.** Registration
- 1:00 - 1:45 p.m.** Defining “Service”
- A task is what I do, while the “service” is how I perform that task.
  - What makes good service, no matter the environment?
  - Open discussion: What are external examples of service?
- 1:45 - 3:30 p.m.  
(includes break)** Service Etiquette; Changes Per Service Channel
- In-Person service standards, appearance and smile
  - Voice of the company over the phone
  - Email or forms: Writing competencies
  - Online chat: Meeting the challenges
  - Assessment: How will you get experience across channels?
- 3:30 - 4:30 p.m.** The Service Personality
- Myers-Briggs Type Indicator (MBTI) personality preference assessment
  - How personality preferences impact service
  - Strengths and weaknesses for service professionals
  - Assessment: Who will help you develop your service style?
- 4:30 - 5:15 p.m.** Competencies Required for Service Professionals
- Content plus service competencies
  - Pros and cons of multilingualism
  - Efficiency defined in personal terms
  - Smiling alone will never work
  - Accuracy vs. speed
  - Taking responsibility
  - Keeping a promise, delivering an SLA
  - Assessment worksheet: Competencies you need to improve?
- 5:15 - 6:15 p.m.** Networking/Working reception (included in registration fee)



# AGENDA

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TUESDAY, OCTOBER 14, 2014

- 8:00 - 8:30 a.m.** Continental breakfast (included in registration fee)
- 8:30 - 9:30 a.m.** In the Shoes of the Student as Customer
- Calendars across the university
  - Cultural literacies
  - Generational differences
  - Assessment: What students worry about when
- 9:30 - 10:15 a.m.** Family Education Rights and Privacy Act (FERPA)
- History overview of the legislation
  - What it means at your institution
  - How does it impact good service?
  - Assessment: What role will it play in your office?
- 10:15 - 10:30 a.m.** Break
- 10:30 a.m. - 12:00 p.m.** Look and Sound of the Service Professional
- Voice of the company: Speaking for the institution
  - Tone says more than content
  - Be heard the first time with good diction
  - Body language as unspoken messaging
  - Matching physical and verbal communications
  - Assessment: Voice and body awareness over time: Your next steps
- 12:00 - 1:00 p.m.** Lunch (included in registration fee)
- 1:00 - 2:00 p.m.** Service Roles and Responsibilities Defined
- What you can do vs. should do for the customer
  - Going above and beyond, what does it look like?
  - Reporting to manager when something is broken
  - Open discussion on roles and responsibilities



# AGENDA

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- 2:00 - 3:00 p.m.** Using SLA's (Service Level Agreements)
- Controlling realistic student expectations
  - Ensuring follow-up
  - Never blaming the "system"
  - Explain only what they "need to know"
  - Assessment: Worksheet with partner
- 3:00 - 3:15 p.m.** Afternoon break
- 3:15- 3:45 p.m.** Scripting: Greetings, Asking Questions, Saying Goodbye, etc.
- Types of greetings (two-four step, etc.)
  - Why your name is so important
  - Using their name is important, too
  - Asking polite but critical questions
  - Goodbye needs to ensure student success
  - Worksheet: Working alone to write your script
- 3:45 - 4:45 p.m.** Triage: How to Help the Student Determine What They Need
- The destructive role of jargon in good service
  - Helping to determine what is wrong
  - Getting facts within the emotion
  - Making the best next step happen
  - Role play: Working with a partner on triage
- 4:45 - 5:30 p.m.** Efficiency vs. Accuracy vs. Thoroughness
- Why bother with going fast?
  - Efficiency defined
  - Accuracy defined
  - Thoroughness redefined
  - Bringing them all together
  - Role play with deck of cards



# AGENDA

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WEDNESDAY, OCTOBER 15, 2014

- 8:00 - 8:30 a.m.** Continental breakfast (included in registration fee)
- 8:30 - 9:15 a.m.** Delivering “No” and Other Bad News
- Taking charge of the exchange
  - Making them know you care
  - Explaining what you can do instead
  - Getting agreement on a plan
  - Role play with deck of cards
- 9:15 - 9:30 a.m.** Break
- 9:30 - 10:15 a.m.** Dealing with Difficult Student Customers
- Keeping your service levels in tact
  - What never to say, no matter what
  - Emotional intelligence and awareness
  - Escalation, or knowing when you need help
  - Having a safety plan “just in case”
  - Role play with deck of cards
- 10:15 - 11:00 a.m.** Dealing with Front-Line Stresses as Professionals
- In the moment, keep breathing
  - What to do right after the exchange
  - Repairing your day, make a plan!
  - Keeping watch over long term stress
  - Group exercise: Meditation as one way.
  - Discussion to explore and share personal tips
- 11:00 - 11:30 a.m.** Final review, Q&A and next steps
- 11:30 a.m. - 1:00 p.m.** Final role play video recorded
- \* Both the online test and recorded video are required to complete the certificate.

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# INSTRUCTOR



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**SUSAN LEIGH / President***Susan Leigh Consulting LLC*

Combining successful careers in both professional theatre and higher education spanning over thirty-four years, professor Susan Leigh recently retired as associate vice president for enrollment management and marketing after twenty-two years at DePaul University in Chicago to consult full time in higher education. While at DePaul, Susan made significant contributions to the advancement of student service standards by leveraging technologies along with “big data” resident within the PeopleSoft student information system to accomplish customer-centric business process redesign. Susan led the creation of DePaul Central in 2006, an award-winning one-stop cooperative model with two onsite campus locations.

Drawing on her expertise in the university classroom, Susan developed ReEnvision Customer Service: Certification Training for Higher Education Professionals with beginner, advanced, and “train the trainer” levels. The new training curriculum that debuted in October in Denver with Academic Impressions for both national and international trainees can also be tailored and branded as campus specific upon request. A frequent speaker at conferences nationally, Susan’s ideas have been published in many journals; her most recent article appeared in the AACRAO *SEM Quarterly*, July edition.

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# HOTEL RESERVATIONS

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The conference will be held at:

Grand Hyatt Denver  
1750 Welton Street  
Denver, CO 80202

To reserve your room, call (303) 295-1234. Please indicate that you are with the Academic Impressions group to receive the room rate of \$189 for single or double occupancy, plus applicable tax.

A room block has been reserved for the nights of October 12-14, 2014. Reservations must be made by September 22, 2014. There are a limited number of rooms available at the conference rate. Please make your reservations early.

Treat yourself to the exceptional at Grand Hyatt Denver. Fresh from a \$28 million renovation, the AAA Four Diamond hotel welcomes you with newly appointed guestrooms and a smartly redesigned lobby in a stylish, modern setting.

Ideally situated in the central business district, Grand Hyatt Denver places you in the heart of the city's commerce, finance, and entertainment centers. The hotel is located a few blocks from the Colorado Convention Center, and one block from the 16th Street Mall.

Grand Hyatt Denver is located 23 miles / 31 minutes from Denver International Airport. We recommend allowing an hour for transportation from Denver International Airport to Grand Hyatt Denver. Yellow Cab Taxi is available, and fare is approximately \$50-60 one way. All ground transportation services at Denver International Airport are located in Jeppesen Terminal, level 5. For information, call 303.342.2000 or visit <http://www.flydenver.com/parkinggt>.





**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.

# 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.

Conference
Conference - \$1295 USD
<input type="checkbox"/> __ # of attendees

Total \_\_\_\_\_



**ATTEND AS A TEAM** - remember, when 2 members of the same institution register, a 3rd registration is 50% off.

### EARLY BIRD PRICING

Postmarked on or before September 26, 2014. For registrations postmarked after September 26, 2014, an additional \$100 fee per registrant applies.

Visit our website to register online:

<http://www.academicimpressions.com/conference/reenvision-customer-service-certification-training-higher-education-professionals-october-2014>



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## 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, ACPA, 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



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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



Form fields for credit card information: Name on Card, Account Number, Billing Address, Billing City, Billing State, Billing Zip Code/Postal Code, Exp. Date, Security Code.

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.



# 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.

## ONLINE TRAININGS CONSISTING OF AT LEAST ONE LIVE TRAINING DATE

You will receive a full refund (less a \$75 service charge) if you cancel 8 weeks or more prior to the first live training date. If you cancel within 8 weeks of the first live training date, you are not entitled to a refund. But as a courtesy, we will apply your payment (less a \$75 service charge) towards a future purchase within one year from the date you cancel. Your payment is transferable to another person from your institution if you wish. You may name a substitute primary participant free of charge at any time prior to the first live training date. If available, you may switch the live training format to a self-paced format (such as a CD-ROM Recording or On-Demand Download) free of charge. (Shipping charges will apply to CD-ROM Recording orders outside the U.S. or Canada.)

## ONLINE TRAININGS WHICH ARE PURELY SELF-PACED

All sales are final. No cancellations or refunds are provided.

## RECORDINGS, ON-DEMAND DOWNLOADS, MONOGRAPHS AND OTHER PUBLICATIONS

All sales are final. No cancellations or refunds provided.