



CUSTOMER SERVICE TRAINING FOR FINANCIAL AID STAFF

September 23, 2016 :: 1:00 - 2:30 p.m. EDT

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Engage your financial aid staff in a conversation about customer service.

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OVERVIEW

Learn how to improve your student and parent-facing customer service skills in the financial aid office. Designed specifically for financial aid professionals, this training will walk you through the fundamentals of how to approach your day-to-day work through a customer service lens and will equip you with techniques for navigating the more difficult conversations that also arise in financial aid counseling.

GROUP DISCUSSION AND HANDS-ON PRACTICE

Because this webcast is intended to be a skill-building opportunity, you will be asked to participate in a handful of group discussions and scenarios throughout the program. Please come to the webcast with your thoughts and ideas and be prepared to engage, share, and participate!

[VISIT EVENT PAGE](#)

<https://www.academicimpressions.com/webcast/customer-service-training-financial-aid-staff>



WHO SHOULD ATTEND

This webcast has been designed for financial aid professionals who would like to improve their customer service skills, both in the everyday context and when delivering difficult news to students and families.

This webcast is also suitable for Directors of Financial Aid and Enrollment Managers who wish to implement or improve customer service training among their financial aid staff.

Financial aid teams, consisting of Enrollment Managers, Directors, and groups of financial aid staff, are encouraged to attend this webcast together and use it as a starting point to discuss and workshop their own customer service practices in the financial aid office.

LEARNING OUTCOME

After participating in this online training, you will be able to improve your frontline customer service skills in the financial aid office.

CONTACT US FOR MORE INFORMATION

Contact Sarah Seigle, Conference Director at Sarah@academicimpressions.com or 720-988-1216 if you'd like additional information about the program.



AGENDA

Friday, September 23, 2016 :: 1:00 - 2:30 p.m. EDT

➔ **Approaching Financial Aid Through a Customer Service Lens**

- Group discussion: what does providing good customer service in financial aid mean?
- Do's and Don'ts
- Group discussion: ethical considerations
- Streamlining policies and procedures
- Internal branding: positioning your office as a resource
- Institutional examples

➔ **Techniques for Difficult Conversations and Delivering Bad News**

- Group discussion: your experiences with delivering bad news in financial aid counseling
- Navigating difficult conversations via phone
- Delivering bad news in an in-person counseling setting
- FERPA considerations
- Hands-on practice: Scenarios

INSTRUCTOR

Chandra Owen, Office of Financial Aid Training Coordinator, Michigan State University

Prior to working in her current role as the training coordinator/social media liaison, Chandra served as a financial aid advisor, scholarship coordinator, and in financial aid application processing.

Chandra has volunteered on several committees for the Michigan Student Financial Aid Association (MSFAA) and the Midwest Association of Student Financial Aid Administrators (MASFAA), often presenting on social media and student communication at regional conferences. She is currently serving as Co-Chair of the MSFAA Communications and Electronic Initiatives Committee. She was selected to speak at the 2016 National Association of Student Financial Aid Administrators (NASFAA) conference on "Financial Aid in a Hashtag World" regarding the topic of social media in the financial aid office. Chandra has produced instructional videos for the Michigan State University office of financial aid that were recognized through a NASFAA Gold Star Award Honorable Mention in 2014. Chandra holds a MA in Educational Technology.



PLEASE FAX ALL REGISTRATION PAGES TO: 303.221.2259

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EARLY BIRD PRICING

Postmarked on or before September 16, 2016. After September 16, 2016, an additional \$75.00 fee for the first connection and \$50.00 fee for each additional connection applies.

[REGISTER ONLINE](#) or below.

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.

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