

# CUSTOMER SERVICE SKILLS TRAINING: CERTIFICATION FOR HIGHER EDUCATION PROFESSIONALS

March 18 - 20, 2019 | Denver, CO



## *Get certified in service excellence to boost student satisfaction on your campus.*

### OVERVIEW

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As competition in higher education intensifies, so do prospective students' appetites to shop for institutions that provide the best education, experience, and amenities for their tuition dollars. Embedding a culture of service excellence at all levels of an institution can directly enhance enrollment and improve student retention. More and more institutions are responding to the implicit connection between the quality of customer service and the success of the larger institutional mission.

Join us for this one-of-a-kind learning experience, unique to the higher education training space, specifically developed for both frontline customer service professionals and those who supervise them. Through a number of interactive, hands-on sessions and small-group activities, you will dive deep into:

- Critical competencies of good customer service in higher education
- Maintaining consistency across service channels
- The conversation cycle and scripting
- Assisting difficult customers
- Understanding the full spectrum of customer relationships - from students and their parents to internal stakeholders
- Measuring and assessing your customer service culture

You will leave this training with increased confidence in your customer service skills and a heightened ability to handle a wide variety of service scenarios.

### GET YOUR TEAM CERTIFIED

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This event culminates in a final, written exam. Upon demonstrating your mastery of the subject matter discussed throughout the conference, you will receive a certificate of completion for your time spent and knowledge gained at this event. Show that your campus is a leader in customer service by getting your entire frontline staff certified!

### UNLOCK SAVINGS BY BRINGING YOUR TEAM!

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**Register two colleagues from your institution and a third can attend for 50% off!**

## POST-CONFERENCE WORKSHOP: LEADING CULTURE CHANGE TO ENHANCE SERVICE EXCELLENCE

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This optional post-conference workshop will focus on how to lead a culture shift towards service excellence at your institution. Our expert facilitator will help those interested in starting a Service Excellence Initiative at their institution identify where to start, how to sustainably roll it out, and how to get buy-in to truly change the culture. You will also discuss how to leverage data to implement and lead new service excellence initiatives and on your campus.

### WHO SHOULD ATTEND

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This conference has been specifically designed for both managers and frontline staff across enrollment and student services in higher education. The program will especially benefit you if:

1. You are a **frontline service provider** looking to enhance your customer service skills.
2. You are a **manager or director supervising frontline service providers** and looking to bring training ideas back to your institution.
3. You are a **campus leader** looking to lead culture change and implement a service excellence program on your campus.

# AGENDA

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## *Day 1: The Service Paradigm*

**March 18, 2019**

### **Registration**

*12:30 - 1:00 p.m.*

### **Welcome and Introductions**

*1:00 - 1:30 p.m.*

### **Defining Service: How Does Customer Service Impact Higher Education?**

*1:30 - 2:30 p.m.*

What defines good vs. bad customer service? We'll dive into customer service models and research that will enhance your understanding of the role customer service plays within higher education. This interactive session will set the stage for the rest of this event and provide strategies to educate, lead, and empower others shift towards a culture of service excellence at your institution.

### **Visioning Exercise: Moving the Needle at Your Institution**

*2:30 - 3:00 p.m.*

This exercise will help you connect the conversation about what makes good customer service and root it firmly within your specific higher education service environment. You will be guided through an activity that will prompt you to think about what service currently looks like at your institution, what you would like it to look like, and what is most important to those to whom you currently serve. You will be asked to share your results with your tables and with the larger group.

### **Afternoon Break**

*3:00 - 3:15 p.m.*

### **Competencies for Service Excellence**

*3:15 - 4:30 p.m.*

This session will provide an in-depth, example-based overview of the various kinds of competencies that are needed to provide high-quality customer service to students in today's higher education environment. Types of competencies to be discussed are physical, emotional, knowledge-based, environmental, and cross-cultural.

### **Self-Assessment Activity**

*4:30 - 5:00 p.m.*

You will have the opportunity to conduct a self-assessment of your own customer service skills based on the service competencies presented. You will be able to be more effective in your role through understanding your own areas of strengths and opportunities for growth.

### **Networking Reception (included in registration fee)**

*5:00 - 6:00 p.m.*

# AGENDA

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## *Day 2: Foundational Skills for High-Quality Service*

**March 19, 2019**

### **Continental Breakfast (included in registration fee)**

*8:00 - 8:30 a.m.*

### **Enhancing Communications through Scripting**

*8:30 - 9:30 a.m.*

Our second day will open with a session focused on the art of scripting as a means of ensuring consistency across service channels. You will be given time at the end of the session to write your own scripts for phone conversations including greetings, closings, and apologies.

### **The Conversation Cycle**

*9:30 - 10:00 a.m.*

In this session, you will build upon your knowledge of scripting to look more holistically at the four key phases of the conversation cycle. You will learn how to help navigate through unclear student requests and questions, and how to avoid using jargon in your interactions with students.

### **Practice: Role Playing**

*10:00 - 10:45 a.m.*

During this role-playing activity, you will break into groups based upon your role as a manager or frontline employee at your institution. You will then work with a partner to practice and apply the scripting and conversation cycle techniques you learned in the previous session.

### **Morning Break**

*10:45 - 11:00 a.m.*

### **Policies and Practices that Impact Service**

*11:00 - 11:45 a.m.*

Higher education is a place where policies (both formal and informal) proliferate. This presentation will provide examples of formal policies you need to be aware of that have implications for the way you provide service. It will also challenge you to think about informal policies or practices that may be creating service barriers.

### **Lunch (Included in registration fee)**

*11:45 a.m. - 12:45 p.m.*

### **Accounting for Diversity in Higher Ed Customer Service**

*12:45 - 2:00 p.m.*

Diversity must be taken into account in the service you provide. You will learn how to adjust your service practices and style based on the specific characteristics of the students you encounter. The importance of cultural sensitivity, awareness, empathy, and listening will be emphasized.

# AGENDA

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## **March 19, 2019 (CONTINUED)**

### **Afternoon Break**

2:00 - 2:15 p.m.

### **Measuring and Assessing Your Customer Service Culture**

2:15 - 3:45 p.m.

During this session, we will explore a variety of measurement and assessment tools and techniques that can be used to gauge the quality of customer service your department, unit, or campus currently provides. You will be given time during the workshop to begin to formulate and adapt some of these tools to your own context.

### **Your Service Excellence Action Plan (Working Session)**

3:45 - 4:30 p.m.

Whether you are a frontline professional or a campus leader, it is critical to build out an action plan to maintain momentum when you return to your institution. This interactive working session will provide space for you to identify barriers you will likely encounter, champions to get buy-in from, and your next steps when you return to campus. Our expert instructors will be on-hand to help you build out your plans.

### **Time for Q&A and Handing out Final Exam Study Guides**

4:30 - 4:45 p.m.

As we close Day 2 of the conference, we will have time to debrief about what we have learned so far. You will also receive a study guide for the final exam during this time.

## **Day 3: "The Tricky Stuff"**

## **March 20, 2019**

### **Continental Breakfast (included in registration fee)**

8:00 - 8:30 a.m.

### **Leading and Supporting Frontline Service**

8:30 - 9:15 a.m.

Our final day will open with an interactive session in which we will share tips and techniques for managing stress in the higher education frontline service environment. You will gain insights into your stress-handling personality and will think about ways you could improve your own stress management techniques.

### **Delivering No and Other Bad News**

9:15 - 10:30 a.m.

As much as we might like to always deliver good news to our students, sometimes the answer is just not what they will want to hear. We will teach you how to properly say no and deliver bad news by managing emotions, moderating expectations, and maintaining control over the situation. You will be given time at the end of the session to role-play with a partner and practice the techniques you learned.

## AGENDA

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### ***March 20, 2019 (CONTINUED)***

#### **Morning Break**

*10:30 - 10:45 a.m.*

#### **Assisting with Difficult Customers**

*10:45 a.m. - 12:00 p.m.*

From students to colleagues, to parents and alumni, you are likely to come across a variety of stakeholders that can be challenging to assist. Our final instructional session will focus on how to manage the occasional difficult and/or potentially volatile situations that you may find yourself in within your institution. Best practices for ensuring safety, escalating the situation and asking for help, and adhering to your service standards will be discussed.

#### **Conference Close: Final Exam and Evaluations**

*12:00 - 1:00 p.m.*

In order to receive your service excellence certification, you must successfully complete a written exam that will help you solidify and demonstrate everything you have learned. The exam should only take about 30 minutes to complete, but you will have the full hour to work on it.

#### **Lunch for Post-Conference Workshop Attendees (included in workshop registration fee)**

*1:00 - 2:00 p.m.*

#### **Post-Conference Workshop: Leading Culture Change to Enhance Service Excellence**

*2:00 - 5:00 p.m.*

Customer Service is still a new concept for many within the realm of higher education. This post-conference workshop will focus on how to lead a culture shift towards service excellence at your institution. Our expert facilitator will help those interested in starting a Service Excellence Initiative at their institution identify where to start, how to sustainably roll it out, and how to get buy-in to truly change the culture. You will also discuss how to leverage data to implement and lead new service excellence initiatives and on your campus.

## INSTRUCTORS

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### Heath Boice-Pardee

#### Associate Vice President for Student Affairs, Rochester Institute of Technology

Dr. Heath Boice-Pardee has worked as an administrator in higher education for nearly twenty-five years in a variety of administrative and teaching roles. Heath is currently the Associate Vice President for Student Affairs and has served as Interim Senior Vice President for Student Affairs, at Rochester Institute of Technology. Additionally, he is an Instructor in the College of Applied Science and Technology at RIT and has developed a higher education administration Master's concentration focusing on service leadership, customer service, and the student experience. This is a one of a kind program in the world.

Additionally, Heath holds an appointment as an associate faculty member with the School for Advanced Studies at the University of Phoenix and was chosen as one of three faculty members to serve on an academic program council to develop a PhD in higher education program. Most recently, Heath has been awarded a prestigious research fellowship from the Center for Leadership Studies and Educational Research on the topic Identifying Value in Higher Education: A Practitioner's Perspective.

### Emily Richardson

#### Director of the Hayworth Center for Online Learning, Queens University of Charlotte

Since July 2014, Emily Richardson has been responsible for the adult learning population in both online and seated modalities, as well as summer school. Prior to this position, she was the associate vice president for Boundless Learning at Stetson University for two years. She began her education career at Widener University where she spent twenty-one years, initially teaching in the School of Hospitality Management. She also served as dean of the University College, a home for non-traditional students, prior to her departure.

Richardson started her career in the hotel management industry, where she spent time in multiple positions throughout the United States and worked for companies such as Hyatt Hotels, Harvey House Hotels, and RockResorts. Her emphasis during most of her hospitality career was on training for customer service employees.

Since 2002, Richardson has been a member of the University Professional and Continuing Education Association, has served on their board as regional and cabinet chair, and currently is working on their network for small and specialized institutions.

### Eileen Soisson

#### Executive Director of Training, Development and Service Excellence, Coastal Carolina University

Since July 2011, Eileen Soisson has been leading Coastal Carolina University's service excellence initiative, Feel the Teal®, created to enhance the university's culture and become more service-oriented and focused on student success. Soisson designed the service excellence program into eight training modules and oversees all operations within the initiative. She teaches university employees and others how to deliver better service within higher education. This past year, she led 262 customer service trainings for Coastal Carolina University employees, student workers, affiliate groups and other university stakeholders. She also oversees the Feel the Teal® Steering Committee and Feel the Teal® Leadership Team at Coastal Carolina University.

Eileen began her career in the hospitality industry and worked with the American Hospitality Academy for more than 10 years before starting her own business, The Meeting Institute, in 2004, which provides various training and development programs in the areas of leadership and customer service within the private sector. Her clients included the U.S. Army, Audi of America, the Myrtle Beach Area Chamber of Commerce Leadership Grand Strand Program, National Recreation Parks Association, and others.



## LOCATION

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***March 18 - 20, 2019 | Denver, CO***

***Hotel:***

JW Marriott Cherry Creek  
150 Clayton Lane  
Denver, CO 80206  
303.316.2700

**Room rate:**

\$199 + tax

**Room block dates:**

The nights of March 17, 18 and 19, 2019.

**Room block cutoff date:**

February 25, 2019.

Reserve Your Room: Please call 303.316.2700 and indicate that you are with the Academic Impressions group to receive the group rate. Please book early - rooms are limited and subject to availability.

# The Academic Impressions Experience



Intimate, workshop-style trainings with personalized attention



Trainings are practical and action oriented so you can hit the ground running



Carefully-vetted expert instructors who are also practitioners in the field



Learner-centric and designed for interaction and collaboration



Highly recommended:  
9 out of 10 participants recommend our trainings to colleagues