

## Approaching Student Support from a Customer Service Lens

Transformation Lab

# Meet Your Presenters



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## Introduction – Customer Service Landscape

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Customized Onboarding

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Frictionless Service

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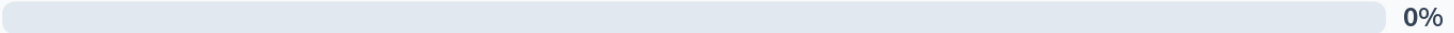
Worksheet

5

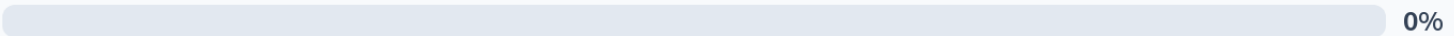
Takeaways and Action Steps

## How often do you use the term "customer service" on campus?

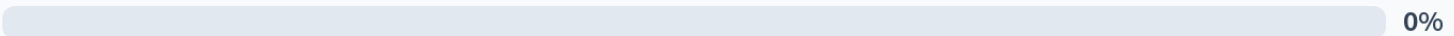
Very often



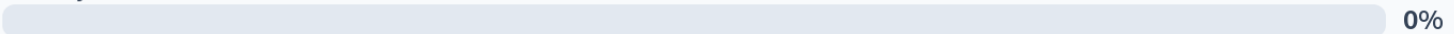
Often



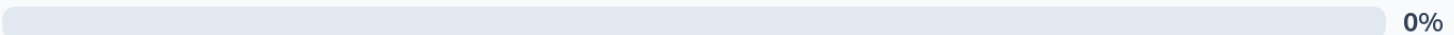
Sometimes



Rarely



Never



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# Adopting a Customer Service Lens



**Student Customer Service:** helping students solve problems, teaching them how to use college resources, and answering questions.\*

... the fact is **our students are consumers**, and the level of customer service from enrollment management and student service offices, as well as faculty, **sends a direct message to students about how much we support their success.**

*-Community College Survey Respondent*

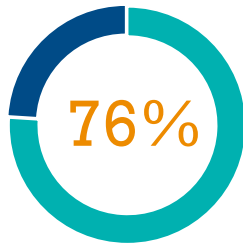
# Students Expect to Be Served Well—and Fast

Customer Service Is Critical to Every Interaction

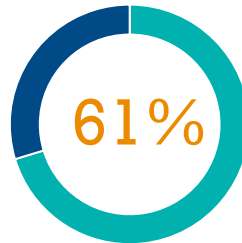
“Student consumer preferences” identified as the greatest threat to institutional business models across all higher ed segments

--EAB's Business Transformation Survey

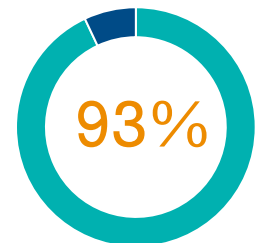
## *Expectations shaped by the consumer market:*



*Expect immediate engagement*



*Would switch to a competitor after only one negative customer service experience*



*Willing to spend more on companies that don't make them repeat themselves*

## When was the last time you went online to view customer service feedback?

Recently

0%

I have in the past, but not recently

0%

Never

0%

Start the presentation to see live content. For screen share software, share the entire screen. Get help at [pollev.com/app](https://pollev.com/app)

# Student Feedback Is Visible

Yelp

16 reviews of [redacted] "I started at [redacted] in 2006 as a part time student and graduated in 2011. I didn't have to take out a single loan while I was at [redacted]. Everything was covered by grants.

It was wise of me to go to [redacted] and save myself thousands of dollars. The campus is well maintained and the professors are hard working and approachable. My biology professor always had kinds words of encouragement for me.

One negative would be the incredibly long wait time to meet with an adviser to registrar for classes. There were times when the whole process took over an hour. Besides that, I really can find no fault with this college.

Going to [redacted] was one of the best decisions I've ever made a... [Show more](#)



On paper, they seem to have wonderful support for students. In actuality, this was not the case at all. I tried many times to get support from campus departments such as student counseling services and academic support. No one provided any support but rather just passed me on to the next service.

Freshman · a month ago · [Overall Experience](#)

[Report](#)

Nov 20, 2019

First to Review

This school is just money hungry and does not care about your education. I signed up online for my next semester classes and was waiting for my financial aid to come through. I had already filed everything needed to be filed. I called the school 4 different times, had to leave a voice mail each time. No one ever called back. I called begging for someone to call me or to send me to someone else to assist me and they just kept giving me the run around. Finally classes had started and I was made to drop my classes because no one called back and my financial aid was still not showing. I



I had full intention of attending grad school but this school has ruined the entire college experience for me. I no longer want to pursue any [more] higher education. I struggled to register for classes but even more so classes I needed to graduate. When I finally finished classes, I asked my academic advisor about the graduation process where they replied, "I'm not in charge of that."

Senior · 2 months ago · [Overall Experience](#)

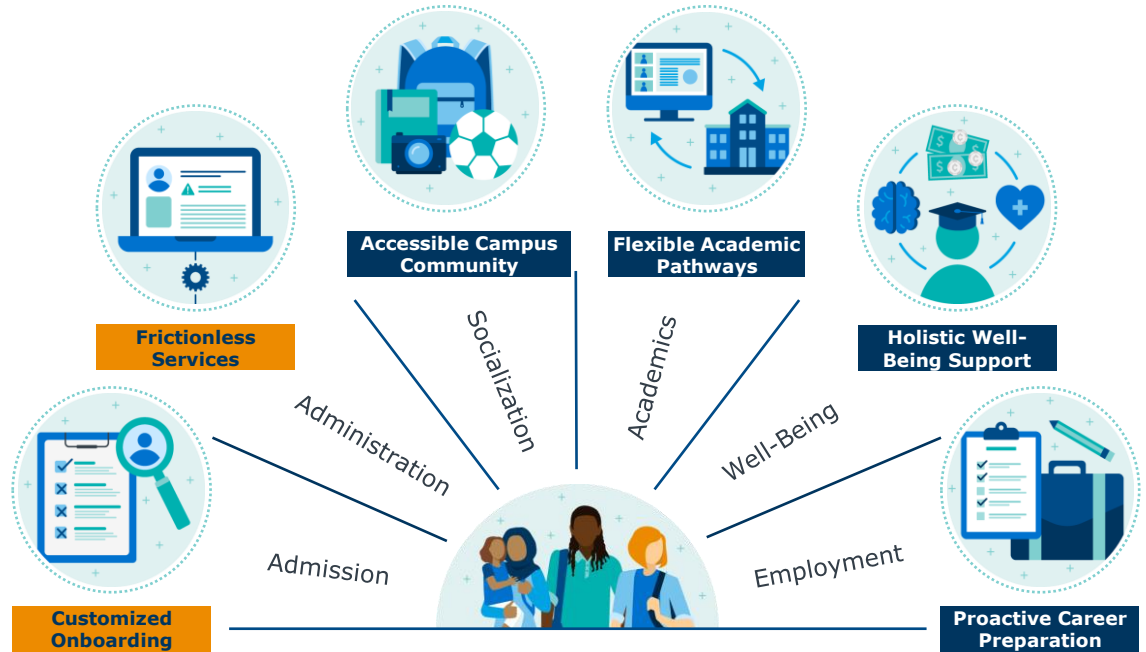
[Report](#)



# Delivering a Modern Student Experience

## What Do Today's Students Expect, and How Can You Deliver It?

*Six hallmarks of a modern student experience*



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Takeaways and Action Steps



# Missing the Mark on Early Interactions

## No Room for Error as Enrollment Competition Increases



### Lack of Insight

71%

Are **not capturing prospective student information** in one easy-to-access place



### Slow-Moving Inquiries

56%

Are taking **more than a day to respond** to prospective student inquiries



### Confusing Onboarding

81%

Think confusing onboarding steps **cause students to leave**

*Poor prospect management leads to less personalized interactions*

*Private sector trends impact speed-to-contact expectations*

*Manual or complex onboarding can lead to momentum loss*

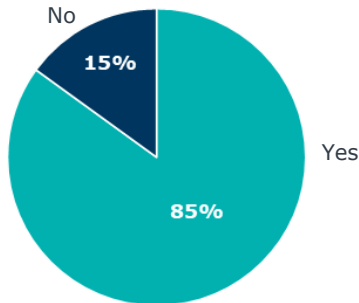


# Students Need Guidance and a Clear Path Forward

## A Customer Service Approach Is Critical to Removing Enrollment Barriers

**Do you think students' customer service expectations have increased since before the pandemic?**

n=164



**What barriers do you think cause new students to stop the enrollment process?**

n=164

**81%** Understanding which steps are needed, and in what order

**59%** Difficulty finding the right person to answer their question

### What Practitioners Shared:



"...the language we use may be not as clear as we want [or like] to admit"



"Information is siloed by department and is not translated well on webpages nor to key advising and enrollment staff"



"...filling out excessive paperwork and electronic forms, rude and unsympathetic faculty and staff"

# Recommendations for Customized Onboarding



## Customer Service Training

Investing in customer service training, including trainings used in the private sector, can help set the foundation for a strong customer service practice.

SF: Degree Planner

Nav: [Training Toolkits](#)



## Examine Service Hours

Evaluate when students are best able to connect with the institution, which might include evenings, weekends, and over historical "breaks."

SF: Meetings Report, Services Report

Nav: [Availabilities Report](#), [Activity Dashboard](#), [Surveys](#)



## Unify Prospective Student Information with Tech

It's easier to provide tailored service if we understand a student's needs, preferences, and past interactions with the institution.

SF: Email, Appointments, Meeting Outcomes (Speed Notes)

Nav: [Recruitment Management](#)



## Optimize Self-Guidance

Robust self-guidance tools, such as well-organized websites, chat bots, and mobile apps, make it easier for students to access information without needing to email or call the institution.

SF: Success Network, Degree Planner, Raise Your Hand

Nav: [To-dos](#), [Resources](#), [Academic Planner](#), [Hand Raise](#)

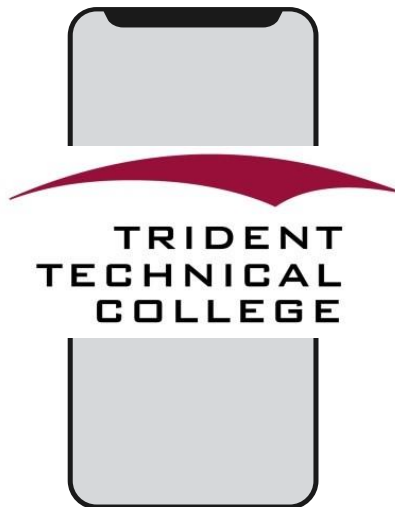
# Customized Onboarding

## Inspiration from the Collaborative



### Starfish

- **Goal:** Assist students post-pandemic who were unfamiliar with on-campus processes and resources
- **Solution:**
  - Deans texted students broken out by cohort (first-year, transfer, not registered)
  - Texts asked what help students needed and provided key dates, registration assistance, advisor details, and encouragement
- **Results:**
  - Healthy response rates
  - Improved sense of care
  - Improved sense of belongingness



### Navigate360

- **Goal:** Increase awareness of Summer Orientation
- **Solution:** Sent emails and text messages to newly accepted students along with a "Next Steps to Enrollment" text message after orientation
- **Results:**
  - 15% increase in students completing orientation
  - Greater student adoption of appointment scheduling

# Customized Onboarding

## Inspiration from the Collaborative

### Navigate360



WICHITA STATE  
UNIVERSITY

#### Goal:

Decided to simplify advising during the orientation process by:

- Moving walk-ins to optional appointments
- Allowing last-minute scheduling
- Launching **campaigns** for 15-min appointments



#### Solution:

- Sent student satisfaction surveys via **text message**
- Evaluated service hours



#### Results:

- Reduced wait times and traffic in Advising Center during orientation
- Improved student and family satisfaction

### Navigate360



Set out to create a virtual First Year Success passport to:

- Encourage completion of onboarding tasks
- Optimize self-guidance



Students earned stamps by:

- Downloading **Navigate360 student app**
- Creating **Academic Plan**
- Visiting support offices
- Etc.



- Large data set of engagement data to analyze for correlation with grad/retention rates
- Self-guided tools and resources
- Incentivized onboarding tasks

# Staff Onboarding and Training

## Enhancing Training in Key Areas to Improve Onboarding

24%

Said their institution does not offer training to help faculty and staff **create supportive and inclusive interactions with students**

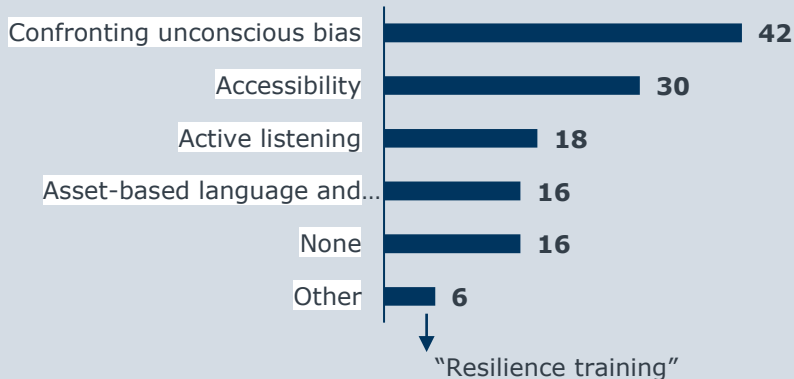


### Inconsistent Training

Respondents noted these trainings are often optional or offered only to certain groups

**Which of the following trainings does your institution offer to help faculty and staff create welcoming, supportive, inclusive, and strengths/asset-based interactions with students?**

*n=68; respondents could choose multiple options*



Invest in customer service professional development



Audit your process for workflow bottlenecks



Create a micro-site or central hub for training resources



Check in with students about their experiences



# Staff Onboarding and Training

Enhancing Training in Key Areas to Improve Onboarding

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## Inconsistent Training

Respondents noted these trainings are often optional or offered only to certain groups

Navigate360



- Expanded training to support Administrative Assistants
- Allowed for increased use of Navigate360 during onboarding and orientation to support academic advising and communication between offices, expanding access to data
- Delivered training to New Student Recruitment team on **referrals/alerts** to support incoming students and reduce communication bottlenecks

 Invest in customer service professional development

 Create a micro-site or central hub for training resources

 Audit your process for workflow bottlenecks

 Check in with students about their experiences

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# Administrative Processes Anything but Frictionless

Disconnection Disrupts the Student Experience and Causes Attrition



## Missed Connections

81%

Think current students have **difficulty connecting with the right people or resources** at least some of the time

*Students may abandon tasks if they can't connect*



## Retention Threats

38%

Think difficulty connecting to staff or tools **contributes to students leaving the institution**

*Accumulation of small inconveniences erodes trust*



## The "Runaround"

44%

Think students needing to **repeat their stories multiple times** hurts retention

*Uncoordinated care impacts persistence*

# Recommendations for Frictionless Service



## Reduce Handoffs

Having a holistic student snapshot available can reduce students receiving "the runaround" and reduce their need to repeat their story, allowing frontline staff to work faster to resolve questions.

SF: Student Profile, Appointments, Success Plans

Nav: [Appointment Summaries + Notes](#)



## Coordinated Care

Developing assigned coordinated care teams comprised of faculty, advisors, and student success professionals makes it easier for students to know whom to connect with and how to reach them.

SF: Success Network

Nav: [Relationship Types](#)



## Proactive Outreach

Anticipating student needs, barriers, and questions early can reduce inbound requests, especially during peak times.

SF: Student Survey, Email + Text, System Flags

Nav: [Messaging Campaigns + Automated Actions](#)



## Tech-Enabled Queuing

Integrating kiosk and virtual check-in system for high foot-traffic areas to streamline the student experience during peak times.

SF: Kiosk (physical + virtual), Service Calendars

Nav: [Kiosk, Appointment Center](#)

# Technology-Enabled Support and Workflows

## Inspiration from the Collaborative

### Navigate360



**COLORADO STATE  
UNIVERSITY**

### Personal Availability Links

- Moved from students needing to email advisors to schedule to using Personal Availability links
- Created two new services for students to schedule directly with advisors for orientation
- Improved student experience and saved time for advisors

### Starfish



**Stark State  
COLLEGE**

### Flags

- Set up transition flags to notify faculty when a student has moved from a professional advisor into the faculty advisor's caseload
- 100% participation in full-time faculty sending new advisees an introductory message
- Also added faculty office hours scheduling links in email signatures

### Navigate360



### Relationship Types

- Expanded to Financial Aid, Faculty Mentors, and Information Services
- Better communication with students and better support data
- Increased appointments made
- Improved retention

### Navigate360



### Kiosks

- Expanded use of kiosks to include supplemental instruction, physics help center, international education
- Easy check-in/checkout for students
- Increased reporting to demonstrate ROI
- Better faculty/staff buy-in and training

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Takeaways and Action Steps

# Modern Student Experience Diagnostic: *Customized Onboarding*

Design Element:	1-5 Score
1. Applicants can easily find out all the required steps to apply and enroll at our school.	
2. Applicants receive nudges throughout the onboarding process reminding them of key deadlines.	
3. We can easily collect important interest and preference data each time we interact with a prospective student and share it with relevant campus staff.	
4. Our website offers tools and resources to help undecided students explore majors and find best-fit options.	
5. We send targeted outreach to prospects, applicants, and current students using multimodal communication (e.g., email, text, mobile app).	
6. We can search our records for applicants who may be struggling to complete their application and quickly get them back on track.	
7. We use web-to-lead ("request for information") forms to collect prospective student information on our website.	
8. Students can make appointments with advising and support services staff using an online system.	
9. We're able to analyze prospective and current student enrollment KPIs from one centralized, easy-to-interpret dashboard	

- Score your institution's progress toward this goal, where "1" means you have not started it, and "5" means it is complete
- When you are done, talk to your neighbors about what customer service gaps may exist in your current onboarding strategies

# Modern Student Experience Diagnostic: *Customized Onboarding*

Design Element:	Tech	Practices
1. Applicants can easily find out all the required steps to apply and enroll at our school.		Clear steps based on persona, within two clicks on website
2. Applicants receive nudges throughout the onboarding process reminding them of key deadlines.	Email, texting, to-dos	Applicants assigned to a recruiter or enrollment navigator
3. We can easily collect important interest and preference data each time we interact with a prospective student and share it with relevant campus staff.	Recruitment Management/Prospective Student	Reference interests and preferences when interacting with prospective students
4. Our website offers tools and resources to help undecided students explore majors and find best-fit options.	Major Explorer/Success Plans	Incorporate career exploration into advising workflows
5. We send targeted outreach to prospects, applicants, and current students using multimodal communication (e.g., email, text, mobile app).	Recruitment Management/Prospective Student	Create targeted messaging templates for different students and scenarios
6. We can search our records for applicants who may be struggling to complete their application and quickly get them back on track.	Recruitment Management	Create a standard KPI for how long applicant conversion should take
7. We use web-to-lead ("request for information") forms to collect prospective student information on our website.		Ensure this form is easy to find; ideally from any page on your website
8. Students can make appointments with advising and support services staff using an online system.	Appointment Scheduling, Personal Availability Links	Tutorials for appointment scheduling
9. We're able to analyze prospective and current student enrollment KPIs from one centralized, easy-to-interpret dashboard.	Population Health/Strategic Analytics	Prioritize students who seem "stuck" with 1 on 1 outreach



## Modern Student Experience Diagnostic: *Frictionless Service*

Design Element:	1-5 Score
1. A student's administrative tasks are user-friendly and digital-first; they can complete almost all their procedural to-dos within one online system.	
2. If a student has a hold on their account, they receive automatic alerts and timely follow-up from a staff member until the hold is resolved.	
3. Students can fill out information online without having to re-key the same information multiple times on a variety of forms.	
4. If a student has a question during the enrollment or registration process, they can easily connect with a person via chat or phone during regular business hours.	
5. When completing state or federal student reporting, we pull our student data from one central database.	
6. Students can access on-demand financial planning resources and tools that provide a personalized cost estimate.	
7. Students know exactly who the members of their assigned support team are and how to contact them.	

- Score your institution's progress toward this goal, where "1" means you have not started it, and "5" means it is complete
- When you are done, talk to your neighbors about what customer service gaps may exist in how you serve current students

# Modern Student Experience Diagnostic: *Frictionless Service*

Design Element:	Navigate360	Starfish
1. A student's administrative tasks are user-friendly and digital-first; students can complete almost all their procedural to-dos within one online system.	To-Dos (mobile app or staff-initiated)	Success Plans + Student Closeable To-Dos
2. If a student has a hold on their account, they receive automatic alerts and timely follow-up from a staff member until the hold is resolved.	Holds	Tracking Items
3. Students can fill out information online without having to re-key the same information multiple times on a variety of forms.	Survey	Student Surveys
4. If a student has a question during the enrollment or registration process, they can easily connect with a person via chat or phone during regular business hours.	Personal availability links, appointment scheduling, drop-ins	Services and Appointments
5. When completing state or federal student reporting, we pull our student data from one central database.	Saved reports, Population Health Dashboard	Reporting, Strategic Analytics
6. Students can access on-demand financial planning resources and tools that provide a personalized cost estimate.	Financial Planner, Resources	Success Plans + Messaging
7. Students know exactly who the members of their assigned support team are and how to contact them.	Success Team	Relationships + Messaging

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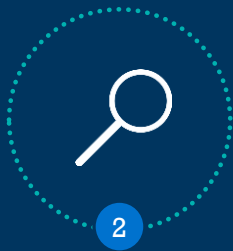
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**Takeaways and Action Steps**

## When You Return to Campus:



Share the diagnostic tools with your team



Identify 1-2 areas for improvement. Use our case study examples as inspiration.



Work with your Strategic Leader to identify Navigate360 and Starfish tools that match your goals.

Whether your results indicated that your student experience is highly modernized or that it still needs work, we have the resources to support you.

## Customized Onboarding

Ensure your students' onboarding experience is seamless, supportive, and personalized.

- [The Modern Student Experience](#) (*resource center*)
- [How to Optimize Your Student Communications Strategy](#) (*toolkit*)

## Frictionless Services

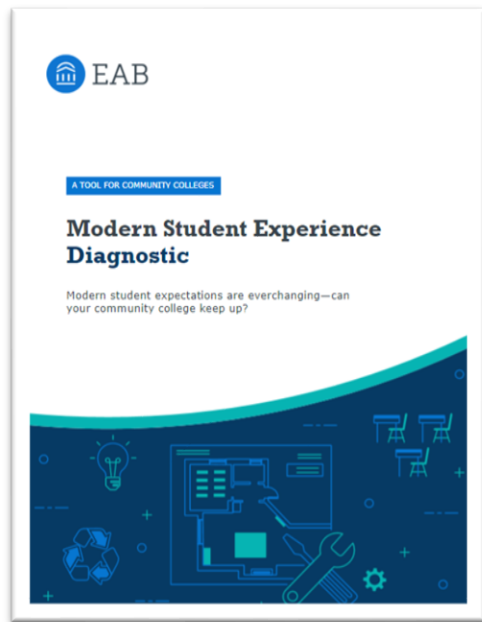
Streamline your services and meet the needs of your students more intentionally.

- [How to Build a Student-Centric Community College](#) (*video*)
- [Are Your Early Alerts Helping or Triggering?](#) (*podcast*)

## Customer Service Research

Streamline your services and meet the needs of your students more intentionally.

- [How to Build a Student-Centric Community College](#) (*video*)
- [Are Your Early Alerts Helping or Triggering?](#) (*podcast*)



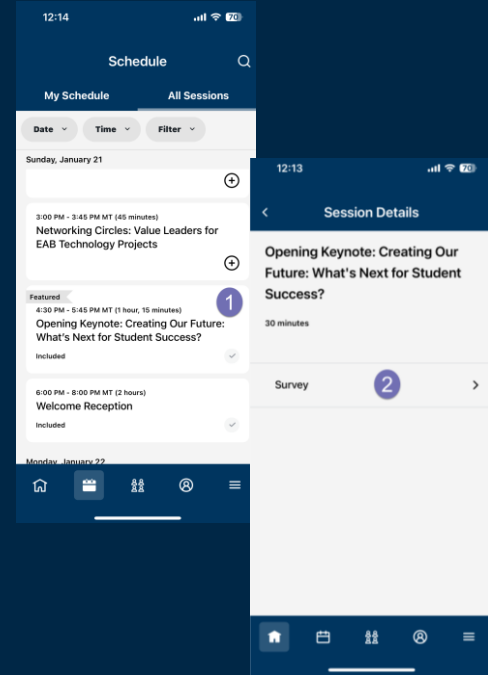
# Complete Session Evaluations

Your feedback is important to us, please take a few moments to **tell us about your CONNECTED experience.**

Evaluations are available in the event app by clicking on a session and then clicking **Survey**.

**Need help with the app?**

Stop by the **information desk!**

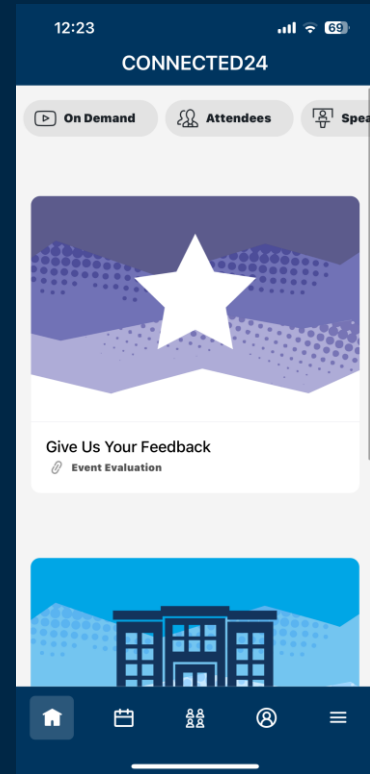


# Complete the Event Feedback Survey

From the front page of the app, click the Give Us Your Feedback box.

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