

Service Excellence Action Plan for Office of the Controller - Student Financial Services

Dimension	Action Step	Timeframe
Communication	Student Financial Services will be piloting and beta testing a new ticketing system to track timely customer service responses (within 1 business day) and follow-up with customers if resolutions are taking longer than anticipated.	Contract should be signed in July, and estimated 6-8 months completion from signed contract.
Process Improvement	Student Financial Services will be piloting and beta testing a new ticketing system to track timely customer service responses (within 1 business day) and follow-up with customers if resolutions are taking longer than anticipated.	Contract should be signed in July, and estimated 6-8 months completion from signed contract.
Attitude	Create a passoff protocol to ensure that students who were passed to a different department has had their needs met, and follow-up if they have not received a response from the appropriate department.	To be implemented with ticketing system, ~6-8 months
Ownership & Accountability	Adding a resource section to our webpage for the frequent departments we need to passoff to, providing consistent content we can rely on when passing students to a different department for assistance. Honing in on passoff responses in a customer friendly way, while keeping ourselves "in the loop" to ensure customer needs are met.	2 months
	The next phase of our website redesign is to make the language on the webpage more consumable for a student, and less wordy. This will assist in ensuring their questions are answered easily upon visiting the webpage, and allowing a follow-up if they need additional information.	6-8 months
	Create a "resource checklist" for new and returning students of action items that need to be completed each academic year that we can publish to our webpage.	2-3 months
	Create a working group to prepare common email responses as we implement the ticketing system to ensure responses are providing accurate and up-to-date information, along with being customer friendly.	3-4 months
	Create a Qualtrics survey that will be included in the standard SFS email signature to receive feedback and ensure all customer needs are met.	1 month

Following negative feedback from the Qualtrics survey, we can ensure we are following up with students to ensure their needs were addressed and who they can escalate complaints to so they feel heard and valued.

1 month