MAINTAINING CUSTOMER SERVICE WITH LESS STAFF

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Create a Comfortable Space

- Bring out your personality
- Make it a fun environment
- Humor is always welcome
- Listen
- Ask questions to engage
- Paraphrase
- Empathize
MAKE A CONNECTION

Look for clues in what they're wearing
Finding a common interest instantly
Relaxes the situation
Keep it light
Helps get the student engaged

WE HAVE A LOT IN COMMON
Reassurance Goes a Long Way

- Remember YOU are the expert
- Think of simple solutions

Welcome!
Everything is fine.
Get Organized

- Create Procedures
  - Helps when it's time to delegate
  - Screenshots are your friend

- Cheat Sheets for Students
  - Keep it Simple
  - Work with Marketing if you have it
  - Canva is really easy to use

- Spreadsheets for EVERYTHING

IS THAT A SPREADSHEET?
Check in with the Boss

- Weekly check-in’s
- Helps to keep priorities aligned
  - The last thing you want to do is go off in a random direction when your boss has other priorities
  - Make sure they know about YOUR priorities and deadlines
- Believe it or not... Relieves some Pressure
  - They may be able to help delegate if you are met with resistance
DELEGATE

Figure out who can help
Think outside the box
Don't forget about FERPA!
I CAME... I SAW...

I OUTSOURCED!

OUTSOURCING ISN'T ALWAYS BAD

Default Management
Verification
R2T4
Know who to contact

- Systems Contact(s)
- IT procedures
  - Help Ticket
  - Phone a Friend
- SAIG Helpline
- COD Helpline
- Colleagues at other institutions

WHO YOU GONNA CALL?
Make Friends Around Campus

- Connections with Departments
  - Business Office
    - Disbursement speed and consistency
  - Advising/Outreach
    - SAP and FAFSA Nights
  - Admissions
    - Cross train to help with customer service
- Cross training goes a LONG way!
- Helps cut down on misinformation
MAKE FRIENDS AT OASFAA

• Like-minded individuals who get it!
• Build connections and learn from seasoned professionals.
• Add tools to your toolbox!
Contact

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