Persona

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Customer Service Representative

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"Sometimes I have to wait 30 seconds before I get data I need to answer questions"

"Recently a student cycled back through the loop and said ...

Can you please help me... Ive talked to three other people already and now I'm here again... I just want know about an unusual charge on my accoount...."

Scenarios

The scenarios assume the Kuali suite is implemented and services are available for all applications. This would then support a consolidated student services customer service facility. This implies a higher level of integration of administrative systems and a higher level of training of the customer service representatives.

The scenarios do not differentiate between a customer service representative/student, parent or customer conversation made by telephone, online chat or exchange of email.

The assumed escalation process would be to a more experienced customer service representative and then to the administrative department.

Account status

A student could call and ask for balances of her student account and ask for activity for the last sixty days. The customer service representative would provide the balances and ask questions about recent activity. The historical activity would be sent to the account holder via email as an attached document. (Because any reference to student financial aid may require encryption, this assumes email exchanges are encrypted or the attachment is downloaded from a protected site).

A parent calls and asks for the balance in the students account. If the parent is authorized to access the student account, the information is provided. If not, an explanation of why the information is not available would be provided.

A customer invoiced for products or services may call for assistance.

Authentication would be required. The level of authentication would depend upon what the products and services might be. For example, the university may issue an invoice for copying and forwarding a document. In this case authentication would be done from knowledge of the transaction.

Payment of a specific charge / payment application

- A student could ask for confirmation that his health insurance was paid (assuming payment application is used). The customer service representative could answer that question and provide a payment application report via email. To provide health insurance, the customer service representative could manually adjust the payment application as requested.

Resolution of transactions that would be produced automatically

The student asks why the refund from dropping a physics class during the "add and drop" period has not been processed. With the student's permission the customer service representative accesses the student enrolment records and confirms the drop has been processed. Because the student is receiving financial aid, the customer service representative accesses the student's financial aid record and observes the student has not been repackaged since a financial aid adjustment may be required. The student is advised the administrative processes take two business days; the adjustment should show "tomorrow."

Change of billing address

A student wants to change the address used for billing. If the address is one of those available, the choice would be made. If the address is a new one, then the address would be entered, An email would be sent showing the change.

Objectives

- Improve service to student through more current, complete, and accessible information.
- Improve staff productivity by automating additional transaction types and providing information needed for staff work.
- Comply with laws, regulations, and practices providing student privacy.

Concerns

- Will the information arrive fast enough for customers not to get frustrated?
- Wil there be access to the information needed to service the customer?
- Will information be integrated or will there be multiple different applications running all with duplicate data?
- It is unclear the impact of regulations on the design and use of KSA.

KSA Rating: 3.2