

DISTINGUISHED EMPLOYEE LEADERSHIP AND TEAM AWARD (DELTA) PROJECT TEAM NOMINATION STATEMENT

Introduction (optional)

The USFSCO Customer Service team spent over a year working on a customer service outreach and satisfaction initiative. The initiative focused on two key areas:

- A. The team targeted outreach activities for their customers by delivering webinars, parent open houses, new services and a website redesign.
- B. The satisfaction focus of the initiative included specific updates to the payment plan. The combination of outreach and satisfaction activities was extremely successful and specific success metrics are noted in further sections of this nomination application.

1. How does this project team demonstrate or model the attributes of successful high performing teams?

The USFSCO Customer Service team is comprised of 11 staff members spread across the three UI campuses. The team approached the initiative very systematically. Meetings were held regularly to determine action items, prepare for next steps, and to ensure that deliverables were met. The team used effective project and meeting management techniques to start the initiative, thoroughly prepare for outreach and satisfaction activities, and execute the initiative with staff support.

2. What has the project team done to provide value added results?

The USFSCO Customer Service group worked on a very specific initiative with focused results. The outreach portion of the initiative included these specific deliverable categories:

WEBINARS & PARENT OPEN HOUSES The purpose of the webinars and the parent open houses was very similar: they introduced parents and new students to USFSCO staff and services. Students and parents also learned how to manage their university bill via the payment plan, authorized payer and direct deposit. Twelve online webinars and six parent open houses were held across the three universities on weeknights and on Saturday mornings to ensure participation. An archived recording of the webinar is also available 24/7 on the USFSCO website. A DVD copy of the webinar with instructions on how to sign up for direct deposit and authorized payer was given to parents and students who attended the open houses.

In addition, staff provided individual consultations in a personal one-on-one setting. The team conducted 160 consultations with freshman for the outreach initiative. This reduced the amount of phone calls in the department by 15% in August and 13% in September.

PAYMENT PLAN USFSCO received feedback from parents that they desired to have options to budget for their students educational costs without having to borrow additional funds. USFSCO went through the process of selecting a vendor and implementing a Payment Plan. It is a popular option, as enrollment doubled from the previous year (currently 1,887 participants paid a total of \$18,812,650).

In June 2009, USFSCO conducted a survey of the plan participants, and found that users had difficulty navigating the Payment Plan process. USFSCO partnered with the vendor to develop a more user-friendly Payment Plan. The changes were well received for the following academic year (5,744 participants paid a total of \$39,522,857.80 as of April 30, 2010). To more accurately estimate future tuition and fees, USFSCO also added a budget calculator.

WEBSITE REDESIGN The USFSCO website was completely renovated with the goals of making it easier to use, more aesthetically pleasing, and to make information more available to its customers. Students and parents are better served when they understand their university financial responsibilities and are knowledgeable about the tools available to meet them. It also reduced stressful interactions with staff, in-person payment traffic, and administrative costs.

3. How did this project team communicate and manage expectations around the project timing and expected results?

The team created a communications plan and used MS Outlook tools to create an activities calendar to plan, manage and track outreach activities including communications blasts, webinars, and open houses. These items helped to clearly identify who was responsible for what and when. The team also involved each university Financial Aid office and Registration office.

Team members were actively involved and provided input throughout the initiative to maximize engagement. For example, staff suggested changing the script of phone blasts to make them shorter and easier to understand. Their input was utilized and increased their level of engagement and commitment to the initiative.

4. How did the team engage stakeholders to provide the resources (talent, tools, and facilities) needed to complete the project team's engagement?

The major stakeholder resource responsibility was for USFSCO staff to accomplish the goals. There were a number of staff changes/moves during the initiative that presented a resource challenge. Several staff left or were promoted and other staff took on more duties as a result. USFSCO also hired three new front-line customer service representatives. Feedback loops and specific intentions to improve staff work experience also helped to encourage collaboration and engagement.

5. To what degree did the project team deliver results that at a minimum meet and potentially exceed expectations of the project team's stakeholders?

The team used customer feedback to ensure a targeted focus. They solicited input after each webinar and made a number of adjustments based on the feedback. Management also used feedback from staff to improve the initiative. The initiative was completed on time and with very little cost during an increased wave of staff movement.