

A hand holding a CD-ROM is the central focus, set against a vibrant, orange and yellow background. The background features a blurred keyboard in the lower-left corner and vertical columns of binary code (0s and 1s) on the left side. The overall aesthetic is that of early 2000s digital technology.

# Software Developers Conference

August 9-10, 2001  
Arlington, VA

The background of the slide is a composite image. On the left, a hand holds a CD-ROM against a bright, glowing orange and yellow background with a grid pattern. On the right, a city skyline is visible in the distance, with a large waterfall in the foreground. The text is overlaid on a semi-transparent grey rectangle in the center.

# Common Origination and Disbursement Customer Service August 10, 2001



# Agenda

- The Customer Service Role
- COD Customer Service – Getting There
- Customer Service and the End State



# The Customer Service Role

## What is it about?

Ensuring Students receive funds timely!

## Primary Roles:

- Provide answer center support
- Provide proactive services
  - Trending
  - Reject Transaction processing
  - Reconciliation support

A hand holding a CD-ROM against a background of a keyboard and a sunset. The image is a composite of a hand holding a CD-ROM, a keyboard, and a sunset. The hand is on the left, holding the CD-ROM. The keyboard is at the bottom, and the sunset is in the background. The overall color scheme is warm, with oranges, yellows, and reds.

# Getting There

- The Build
- Transition
- End State



# Today

Direct Loan  
Origination

Pell - RFMS



COD

# Time-line

**Aug 2001 – Feb 2002**  
Call SFA Customer Service for assistance  
1-800-433-7327  
• Technical/  
• Functional

**Feb 2002**  
All Calls routed to COD Customer Service  
• Technical  
• Functional  
• Operational

**After Feb 2002**  
Call COD center for assistance with Pell and Direct inquiries  
1-800-4PGRANTS  
or  
1-800-848-0978



Aug 2001

Feb 2002

Dec 2002

Feb/ Mar 2003

**February 2002**  
**COD center opens** – 02/03 data accepted by COD, prior data accepted by RFMS & LOS. Applicant services calls & appeal processing continue to be resolved at LOC. COD, LOC, & Pell websites coexist. LOC processes Direct p-notes, mail, and fulfillment



**Dec 2002**  
RFMS data migrates into COD system



**March 2003**  
Borrower Services calls (1-800-557-7394) begin being answered by COD representatives - ALL school services calls are answered by COD representatives - COD processes credit appeals & incoming correspondence





# The Build

*August 2001 – February 2002*

## **Dedicated Technical Support Team**

- Development Staff
  - Main database
  - WEB/On-line Access
  - EAI Team
- COD Functional Experts
- SFA Personnel
- Test Team Members
- All calls routed through Customer Service to allow for issue tracking



# The Build

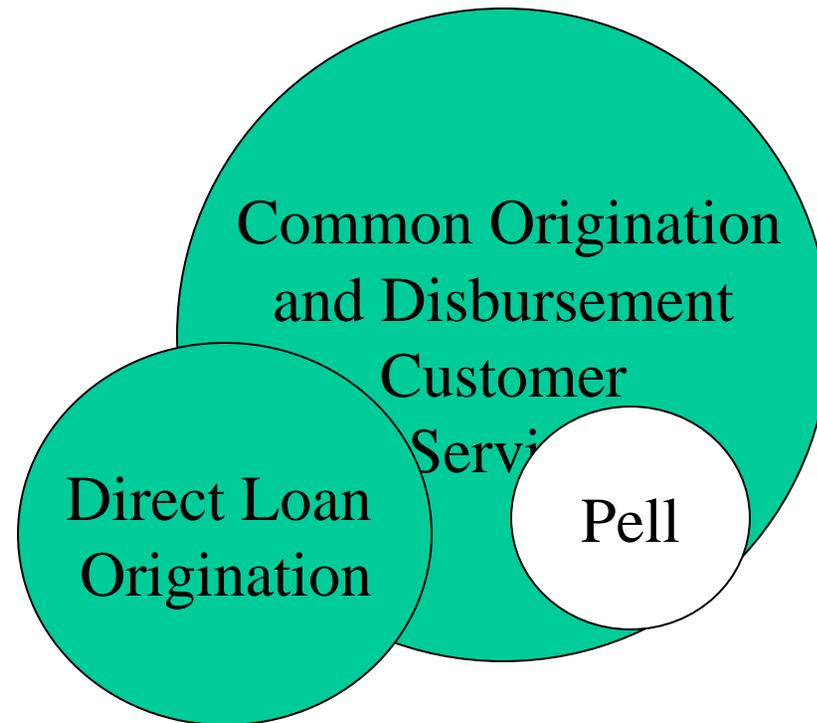
## *Technical/Functional Support*

- **Centralize Questions and Answers**
  - Questions and Answers tracked
  - Infrastructure in place
  - Response tracked and used for FAQ's
  - Response created by Team to ensure the right answer the first time every-time
  - Q&A posted on the WEB to ensure communication to the Community



# The Transition

*February 2002 – March 2003*





## The Build to Transition- Continuity

- Customer Service Participating in:
  - System Integration Testing
  - User Testing
  - End to End testing
- Implementation Team Members on-site during deployment and peak season
- Implementation Team Members remaining with project
- Implementation Team Members participating in training of personnel in Niagara Falls

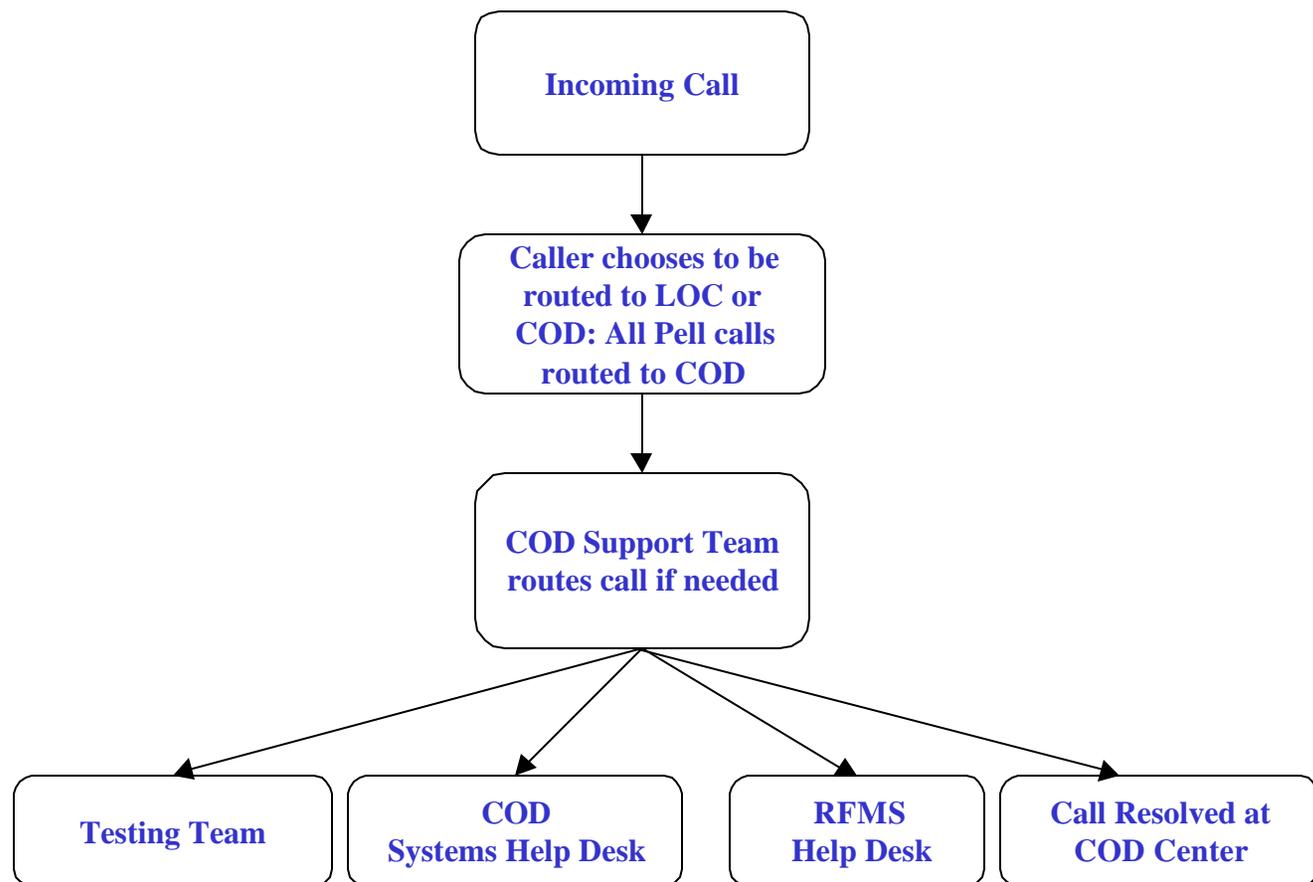


# The Transition

- Dedicated team within the call center for Software Developers
- Specialized call routing and email routing
- CS focal point for all issues to ensure issues are tracked and resolved timely
- On-going notification of issues impacting production and development sent through the Web Bulletin Board
- Centralize EAI support
- On-site personnel from legacy centers

# Transition

*Beginning February 2002*





# End State

Common Origination  
And Disbursement  
Customer  
Service



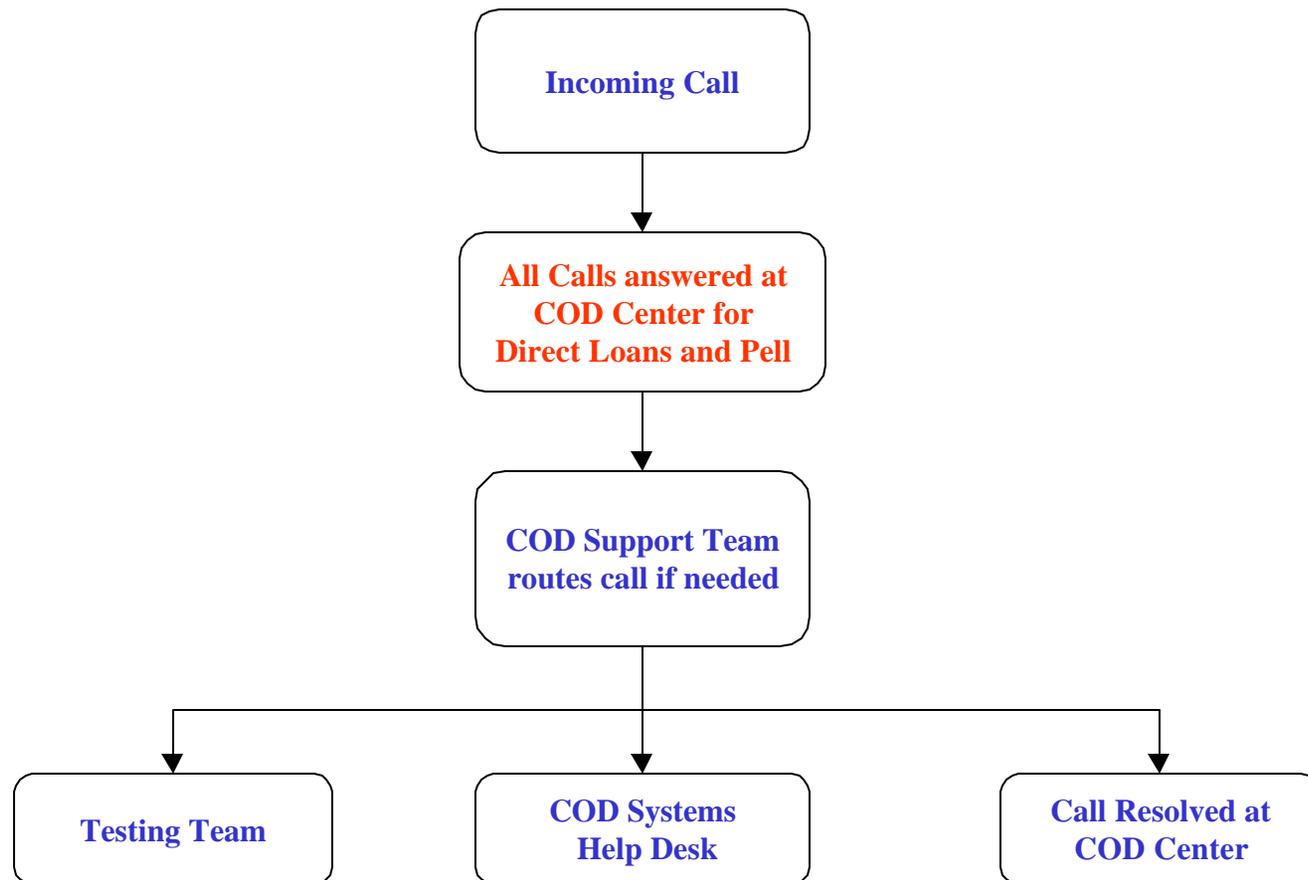
# End State

*Beginning March 2003*

- Dedicated Team within the call center for Software Developers
- Specialized call routing and email routing
- CS focal point for all issues to ensure issues are tracked and resolved timely
- Allows for consistent answers
- On-going notification of issues impacting production and development sent through the WEB

# End State

*Beginning March 2003*





# Customer Service

## Proactive Services

- **Trending Analysis**
  - Monitoring processes for trends in transaction process
- **Isolate problems by software**
  - Tracking of rejects by type/program
  - Workflow management through Queuing Reject corrections
  - Access to diverse adhoc reporting tool



## Customer Service

- **School and CS Representative Empowerment**
- **Updates to data base via the on-line/Web**
  - Ability to access rejected records via the WEB and make corrections (Full Participants Only)
  - Ability to create award records via the WEB/On-line – (Full Participants Only)
  - Releasing Pended/Action Records from the Web(Full Participants only)



# Customer Service Teams

- **School Services Team**
  - Primary Representative for each school/Service
  - A secondary representative and a team of representatives will be assigned as back up
- **Dedicated Support Team for Software Developers**



# Customer Service Teams

## **Borrower Services Team**

- Support Borrower Inquiries, Credit Appeal Processes, & Endorser Issues

## **Reconciliation Team**

- Provide Cash Management Support to Schools
- Transaction Balancing

## **Quality Assurance Team**

- Monitor CSR performance and quality, conduct internal audits & make recommendations to management



# Customer Service Training

- **Individual Training Plans**
  - Score of 95% or better required
  - System Process
  - Pell Process
  - Direct Loan Process
  - Vendor/Software Process
    - **Need your help**
    - Training visits to legacy centers
- **Training visits to schools**



# Customer Representatives

- **Number of issues resolved timely**
- **Quality Control used to score representatives and teams**
  - Teams will be rated on their overall performance to provide for cohesive working environment
- **Results of Outreach calls made to the schools**
  - Overall school satisfaction of service received
  - Measurements include:
    - Follow up to open issues
    - Phone etiquette



## On-Line Access

- Customer Service and School/SFA/Service users utilizing the same application
- Ability to correct data real time on the Web (Full Participants only)
- Ability to view rejects and batch statistics
- Messaging System
- Customer Service Utilizing Queuing for workflow management and trending



# Summary

- Dedicated support provided during all phases of COD deployment
- Questions answered consistently and recorded
- Continuity between build/transition/end state
- Minimize impact to process through transition approach
- School/Customer Service Representative Empowerment



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• QUESTIONS?????

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