



WASFAA Training Committee Presents

REIMAGINING THE FINANCIAL AID EXPERIENCE

IASFAA Conference

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Anthony Morrone, Nevada State College



BE OUR GUEST

Perfecting the Art of Customer Service



with Theodore Kinni

Kinni, T. (2011) *Be Our Guest: Perfecting the Art of Customer Service*.
Glendale, CA: Disney Enterprises, Inc.

In this volatile business of ours we can ill afford to rest on our laurels, even to pause in retrospect. Time and conditions change so rapidly that we must keep our aim constantly focused on the future.

-Walt Disney





COLLEGE IS MAGIC!



PRACTICAL MAGIC

- All aspects of the service experience, but with an emphasis on what happens behind the scenes
- Operational efforts that create a seamless experience for the customer
- *“Quality service means exceeding your guests’ expectations by paying attention to every detail of the delivery of your products and services.”*
 - Theodore Kinni, p. 12





Magic of Service

*“In my organization there is respect
for every individual, and we all have a
keen respect for the public.”*

Walt Disney (Kinni, p. xxiii)

GETTING TO KNOW OUR GUESTS



Invest time and energy into getting to know those served by your operations

- Demographic information
- Expectations of your organization
- Psychological state

Collect information through many different avenues

- Surveys, questionnaires, exit interviews
- Comment cards
- Anecdotes

GUESTOLOGY COMPASS



Needs

- Required result of engaging with services, generally obvious



Wants

- Express a deeper purpose, underlying desires that connect to values



Stereotypes

- Expectations of interacting with an organization, predetermined idea of how interaction will play out



Emotions

- How a person feels during the experience

UNDERSTANDING OUR GUESTS

Service	Needs	Wants	Stereotypes	Emotions
Car Dealer	Car	Status Reliability Safety	Long process Deceptive process Used-car salesman	Uncertainty Excitement Buyers remorse
Bank	Bank Account, Loan	Financial Security Status	Marble floor Formal business attire Physically secure environment	Impatience with lines; Excitement for purchase; Insecurity over financial situation
Dentist	Health Expertise Pain relief	Pain relief Confidence in smile	Sterile Uncomfortable	Anxiety over pain Satisfying feeling of clean teeth
Financial Aid Office	Financial aid Assistance	Understanding Fairness transparency	Confusing process Long lines Helpful	Uncertain Anxious Responsible



Service: Common Purpose

DEFINING COMMON PURPOSE

Quality Standards

- “Operational criteria that ensure the consistent delivery of common purpose”
- Prioritized to provide guidance when competing
 - Disney’s prioritized standards
 - Safety
 - Courtesy
 - Show
 - Efficiency

QUALITY STANDARDS IN FINANCIAL AID



Access

Transparency

Compliance

Efficiency

Equity

Courtesy

Advocacy

Resource Management

DELIVERING ON THE PROMISE



Cast: first critical delivery members of the common purpose and quality standards

Setting: physical and virtual space where you meet your guests

Process: policies, tasks, and procedures that are used to deliver service



Magic of Cast

“people cite interactions with our cast as the single biggest factor in their satisfaction and intent to return”

Kinni p.61

CASTING THE FIRST IMPRESSION

- Use of brand and culture to ensure potential cast members understand what will be expected of them as early as possible in the hiring process.
 - Walt Disney World Casting Center was designed to lead prospects through a maze of Disney culture.
 - “Let them get a taste for Disney before they get there.” p. 63
 - What message does this investment in design and materials send?



What messages do your hiring experiences convey?

OUTFITTING THE CAST



- Multi-tiered approach to orientation
 - **Global** teaches organization-wide concepts and behaviors
 - **Line-of-business** training required for each job category
 - **Location-specific** orientation for each unit
 - **On-the-job** training once in the new role

"We don't put people in Disney. We put Disney in people." p.66

TRADITIONS

Day one orientation has 4 purposes:

- To **acclimate** new cast members to the foundations of the culture.
- To **perpetuate** the language and symbols, heritage and traditions, quality standards, values, and traits and behaviors of Disney.
- To create a sense of **excitement** about working for Disney.
- To introduce new cast members to the core **safety** regulations.

DISNEY SPEAK

ATTRACTIONS	Rides, shows
CAST MEMBER	Employee
GUEST	Customer
ONSTAGE	Guest areas
OFFSTAGE/BACKSTAGE	Behind the scenes
COSTUME	Uniform
AUDITION	Interview
ROLE	Job
HOST/HOYESS	Frontline employee

BEHAVIORS OF QUALITY SERVICE



Performance Tips

- Organization-wide, generic behaviors that preserve quality standards, outline and set expectations for employees

Walt Disney World Resort

Make eye contact & smile!

Seek out guest contact

Preserve the “magical” guest experience



Performance Culture

- Location-specific values and related behaviors that address day-to-day differences across a complex organization

Disney's Polynesian Resort

Aloha: love for others

Kina'ole: flawless guest service

'Ohana: treat others like family

BUILDING A PERFORMANCE CULTURE

Disney's Approach:

- Keep it simple, allow for individuality and personality
- Involve everyone, all must buy-in
- Make it measurable, connect values to behaviors
- Provide training and coaching
- Solicit feedback and ideas from the team
- Celebrate good performance

Kinni, p. 68

CREATING PERFORMANCE VALUES

Existing values within the organization?

New values required to support the local culture?

How will these meet customers' service needs?

What behaviors will demonstrate the values and how to measure?



PERFORMANCE VALUES IN THE FAO?

Empathy: Acknowledging students are human begins with emotions, hopes, fears, and deserve to be treated with dignity

Thoroughness: Anticipate unasked questions, advise on next steps, follow through on all promises

Preparedness: Have a clear escalation protocol to get students the level of assistance they require

Completeness: Minimize bouncing students between offices to complete transactions



Magic of Setting

“setting is the *stage* on which business is conducted” Kinni, p. 94

MICKEY'S 10 COMMANDMENTS



Know your audience

Wear your guests' shoes

Organize the flow of people and ideas

Create a visual magnet

Communicate with visual literacy

Avoid overload

Tell one story at a time

Avoid contradictions

Build an interactive setting

Keep it up

THE FINANCIAL AID OFFICE SETTING



ONE-ON-ONE SERVICE

In person

- How are students greeted?
- How long is the wait?
- Is the office intimidating? Do guests feel comfortable?

Phones

- How long does it take to answer calls?
- Is there a complicated menu?
- Any info while a customer is on hold?

SELF-SERVICE

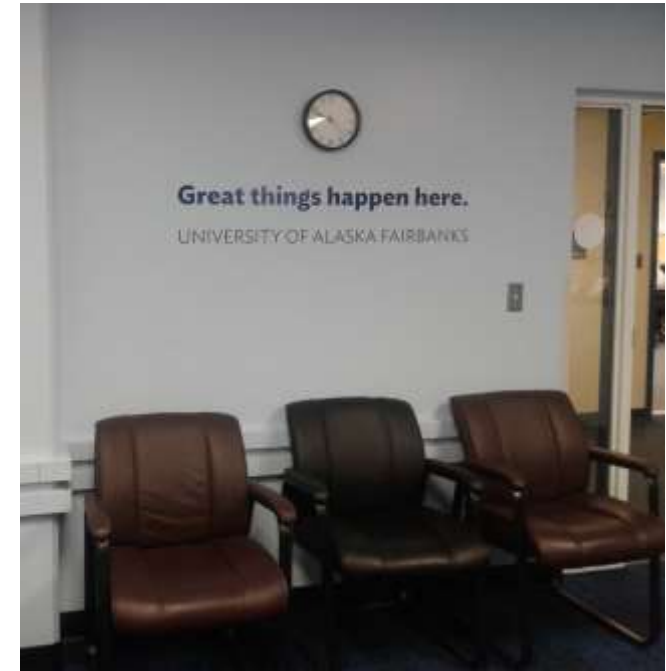
Website

- Is pertinent information easily obtained?
- Is the website appealing?
- Is there too much jargon or is the site easily understood?

Self-Service Portal

- Is Information easily obtained?
- Is the next step within the portal clear to the audience?

SETTING: SELF REFLECTION





Magic of Process

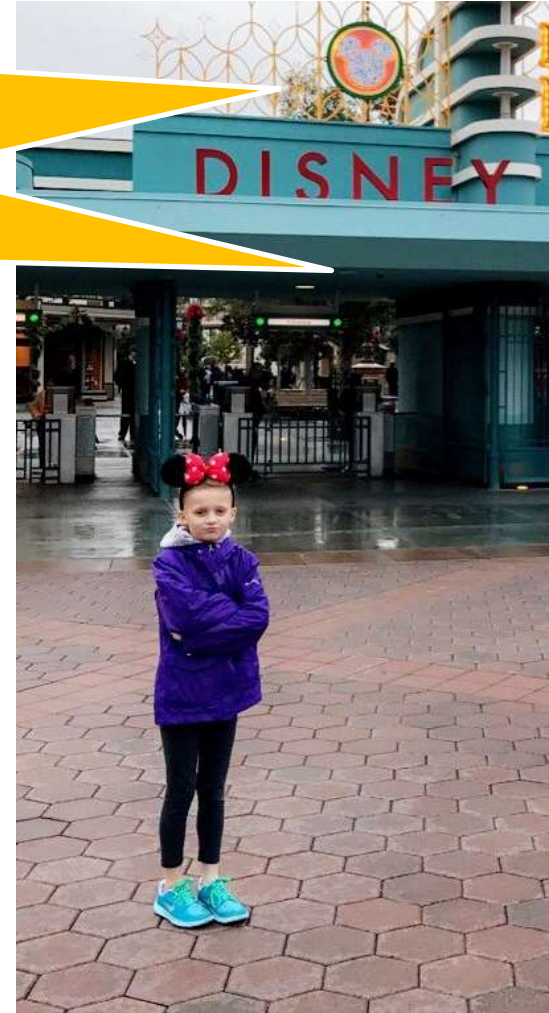
“the policies, tasks, and procedures that are used to deliver service”

COMBUSTION POINTS

Combustion Points: parts of the process that have the potential to inconvenience customers

- **Identifying Combustion Points**

- Listen to feedback
 - *Combustion statements*: what people complain about
- Identify where people get stuck in the process
- Pinpoint problems engaging with your office or services



COMBUSTION POINTS IN THE FAO

COMPLAINTS ABOUT THE FINANCIAL AID PROCESS

It's confusing

Takes too long

Nobody told me

Lacks transparency

Always get a different answer

My situation is different

Hard to predict how much aid I'm going to get

Too many forms

No one answers the phone

COMBUSTION POINTS IN THE FAQ

COMPLAINTS

- It's confusing
- Takes too long
- Nobody told me
- Lacks transparency
- Always get a different answer

- My situation is different
- Hard to predict how much aid I'm going to get
- Too many forms
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Process
Design

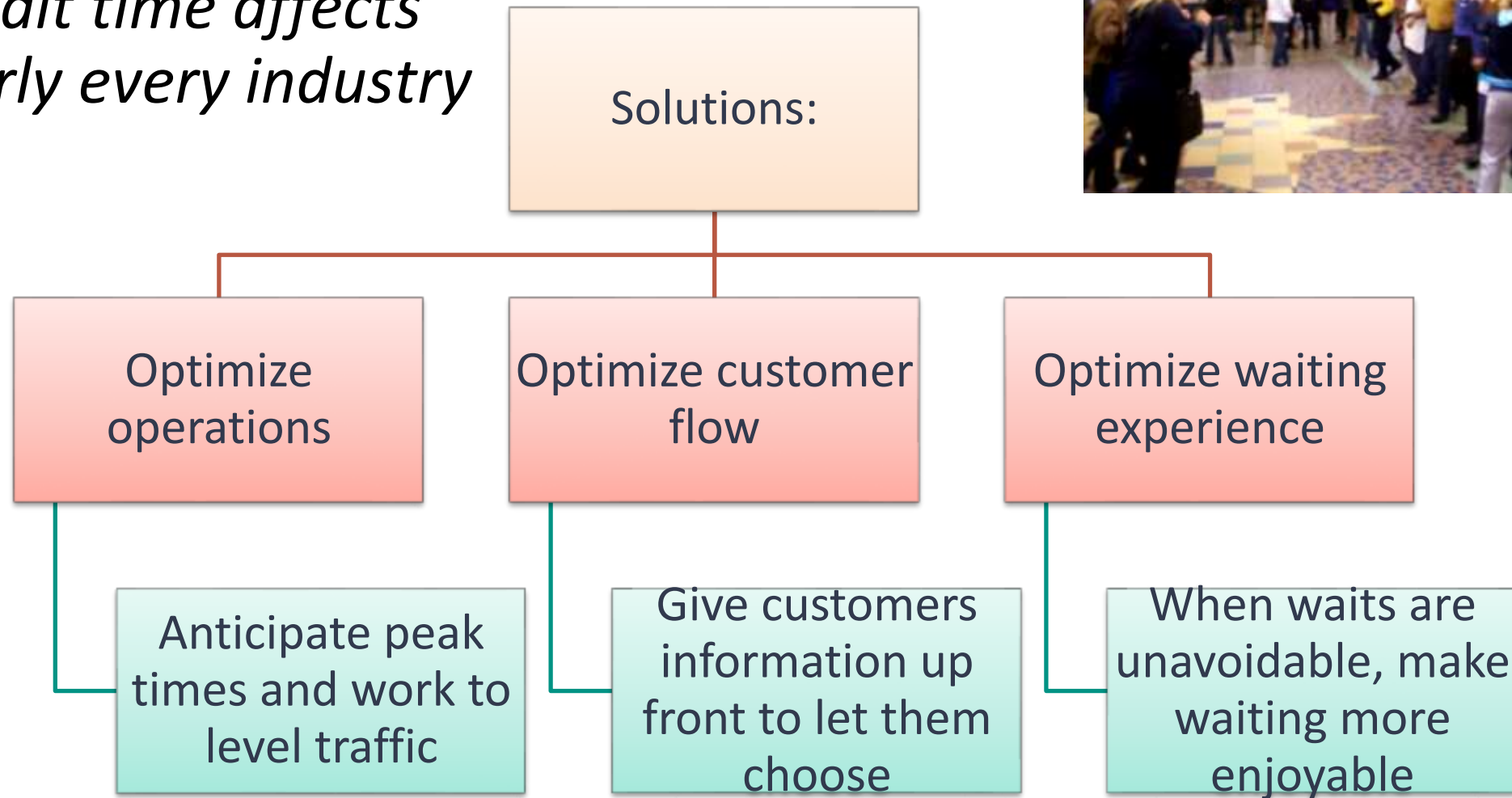
Customer
Flow

Communi-
cation

Special
Needs

CUSTOMER FLOW

Wait time affects nearly every industry



PERCEPTIONS

Most complaints are not about the length of the wait,
rather how the wait was handled

- Key factors:
 - Access
 - Customers want access to services and were frustrated by restrictions and voice mail
 - Respect
 - Customers want to be treated with dignity
 - Information Communication
 - Customers want information so they can have confidence in the process

STAFF TO CUSTOMER COMMUNICATIONS



Answering questions is a regular task

- Listen to the question, anticipate what is not being asked
- Avoid a sarcastic answer or one that would make the customer feel dumb
- Give staff information needed to answer questions
- Share best practices
 - Example: “What time does the three o’clock parade start?”
 - Actual information guest is seeking: when will the parade get to a certain location, what the route is, best place to see parade



Plussing & Debugging

Disney's Art of Continuous Improvement

DEBUGGING IN THE FAO

Flawed Processes

- Re-think ultimate goals and find alternatives to deliver, provide information

Outdated Processes

- Automation, software enhancements, new software on campus

Customer-owned Processes

- People make mistakes, but our area can take the brunt even if it's not our process. (FAFSA, loan applications, etc.)

SERVICE ATTENTION PROCESSES

Service Attention Processes

- Providing service to guests whose needs cannot be met by standard processes
 - International Guests
 - Small Children
 - Guests with Disabilities
- Who are your guests that require service attention processes?

Keys to Effective Service Attention Processes:

- Appropriate resources
- Resources must be communicated to both cast and guests



Putting Quality Service Together

Get a good idea and stay with it. Dog it, and work at it until its done and done right.

– Walt Disney (Kinni, p. 165)

QUALITY SERVICE

	Staff	Setting	Process
<i>Quality Standard #1</i>			
<i>Quality Standard #2</i>			
<i>Quality Standard #3</i>			
<i>Quality Standard #4</i>			

QUALITY SERVICE IN THE FAO -EXAMPLE

	Staff	Setting	Process
Access to resources	Training on resources available to students	Posters, web info on how to apply for aid	Ensure auto-packaging maximize eligibility
Efficiency	Create uninterrupted time for staff to work on processing	Allow for good customer flow, ensure software systems are working properly	QA on automated process to minimize manual work
Courtesy	Training, frequent breaks to ensure staff not overworked	Friendly, welcoming environment	Enable students to self-serve where they are at in the process
Compliance	Training on compliance issues and where they will appear in the process	ADA compliant office	Reports for quality assurance

SUMMARY



Practical magic of seamless customer experience

- *Guestology* Compass
 - Needs, Wants, Stereotypes and Emotions
- *Common Purpose* communicates ultimate goal
- *Quality Standards* ensure consistent delivery of *Common Purpose*

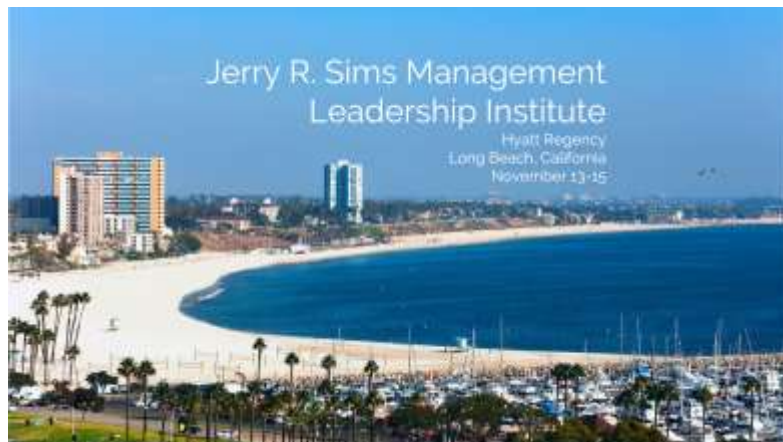
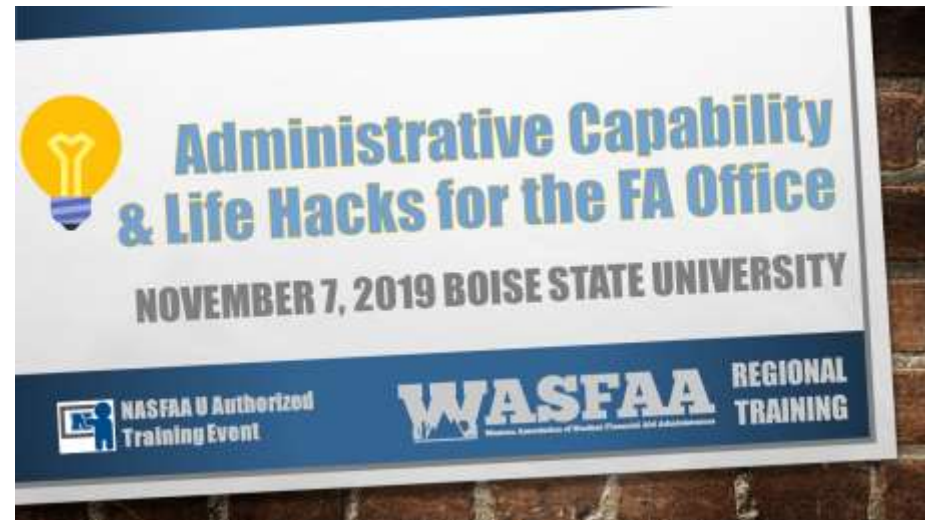
Delivering on the Promise

- *Cast*: first critical point of service delivery
 - Performance Tips, Performance Culture & Performance Values
- *Setting*: where you meet your guests
 - Mickey's 10 Commandments: "*Everything speaks*"
- *Processes*: policies, tasks and procedures
 - Combustion Points, Plussing & Debugging

Putting Quality Service Together

- *Integration Matrix* of Quality Standards and Delivery Points

SEE YA REAL SOON!





The End

Kinni, T. (2011) Be Our Guest: Perfecting the Art of Customer Service. Glendale, CA: Disney Enterprises, Inc.

Pictures: Courtesy of Thalassa Naylor, WASFAA Training co-chair