Maximizing Customer Service Support Efforts
Office of the Bursar

Purpose
- To identify & establish uniformed personnel training procedures associated with customer service within the Office of the Bursar

Problem Statement
- Customers (students/staff) are not always provided the best service & support through the Office of the Bursar
Coordination
- Ms Becky Torres (Comptroller)
- Ms Christina Holzheuser (Bursar)
- Ms Mario Montelongo (Accts Rec Mgr)

Assumptions:
- No training manuals for new hires or existing personnel.
- Personnel do not always probe to ask appropriate questions for nature of business.
- Some members lack general knowledge in areas to provide assistance.
- Others do not have access/knowledge to current systems (FAMIS, SIS, Argos).

Background
Customers (students/parents & staff) are constantly venting their frustration towards AR staff for lack of service provided at the Business Office. How is such service evaluated?
Assumptions

- Lack of follow-through on customer commitments.
- Lack of accountability & performance measurement standards.

Facts

- Lack of continued training for operational changes
- Current reference manuals are limited & outdated
- Cashier (new hires) continue to make posting errors

Suggestive Course of Action

- Update & revise training desk manuals
- Conduct training sessions as needed
- Develop & measure standards for services provided
Suggestive Course of Action

- Investigate & address complaints immediately
- Conduct exit polls during registration period (Fall/Spring)
- Conduct Survey Monkey
- Continue as is

Recommendation

- Since both departments (Business Office/Accounts Receivables) fall under the jurisdiction of the Bursar. Both departments should adhere to the same standards of providing quality customer service & support working as a TEAM