Higher Ed Call Center Outsourcing?

Why do I need it?
What is it?
Does it matter?
How do I evaluate a Vendor?
What can outsourcing bring to my institution?

Why Outsource

There is a Service Dilemma in Higher Ed Today!



- Shrinking Resources Budget/Space/Staff
- Growing Demand from Students
- Complexity Federal/State Regulatory Compliance
- Technology and Student Social Media Distraction



Why Service Matters

Recent Higher Ed study * findings:

- 84 % of ALL attrition tied to service reasons
- 30% of the time, primary reason = school's perceived apathy
- 2nd major reason? Dissatisfaction with treatment by school:
 - "All they seemed to care about was me paying on time."

^{*} Neal A. Raisman, PhD, The 84% Solution, University Business, May 2012

Cost of Poor Service

- Brand/image damage = Declining admissions and Lower Retention
- Lower retention = Lower Revenue
- Replacing Students = Duplicating Cost
- Processing delays
- Poor staff utilization/morale

Are Phone Calls the Right Place to Start? Don't think of it as a phone issue!!

- Calls are the majority of attempted student contacts
- Calls are where the majority of problems are represented and can be identified
- Addressing call issues will illuminate areas that need the most attention and can lead to processing improvements
- Addressing calls can help multiple offices
- Identifying call reasons is the first step in pointing students to other communication modalities

You recognize the problem, what is the solution?

In House – DIY Vs.

Outsourced

Outsourcing Decision Factors

- Financial
 - Cost to handle in-house vs. outsource?
- Human Resources
 - Do you have staffing and training resources?
- Technical Resources
 - Telephony and IT infrastructure?
- Physical Space
 - Is this really the best use of space?
- Service Quality
 - Can you really do it better?
- One or Multiple Departments
 - One-stop-shop? Can other departments benefit?

CMD - Best Practices in Outsourcing

How to evaluate call center vendors.

Things to consider in evaluating a Vendor

- Is having a call center the most important factor? No!
- Higher Ed Experience? What Type?: Verification, Loans, IT, Servicing, is not helpful
- Look for Specific References: They should match up very closely to what you are looking for, should be at least 5
- Schools are different, should have experience with different types, i.e. 4 yr.,2yr.,Private, etc.
- Size and core business?
- What is their approach to working with a school, i.e., customer service, pricing, daily interaction with school, overall goals and success factors?

Other Basic Factors to Consider

Best Practice Considerations:

- Implementation Plan
- SIS Experience: Banner, PeopleSoft, etc.
 - Other Systems Experience: Bursar, CRM, etc.
- Service Level Excellence:
 - 90% Answer Rates
 - 90% First Call Resolution
- Quality Assurance and Training
- Knowledgebase

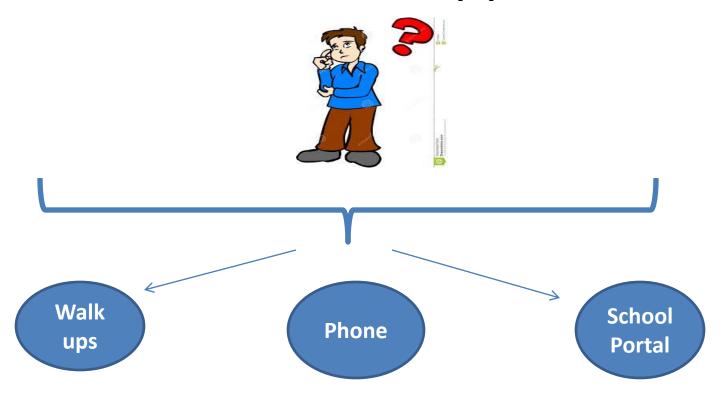
What will Define Success? It's not just answering calls!!!

- Service levels and student satisfaction go up
- Overall cost go down
- Clear understanding of what student issues are and the volume associated with them
- Alternative and cheaper methods of communicating with students
- A customer service infrastructure that provides ownership of the student across multiple offices

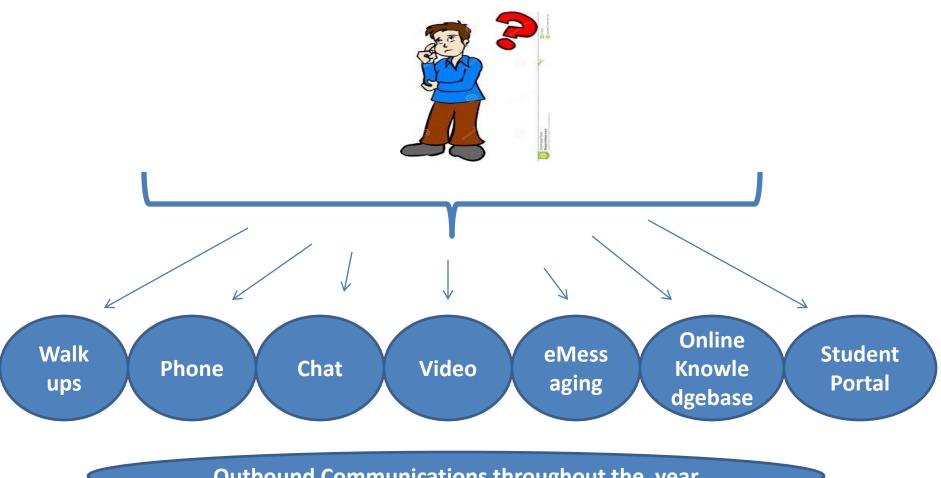
CMD Approach

- Partnership
- Best practice metrics of other schools
- Service level excellence
- A multi-departmental support structure that helps take ownership of the student experience
- A multi-channel structure
- Ultimate success of the project will result in a lower call volume and cost to the school

The Common Approach

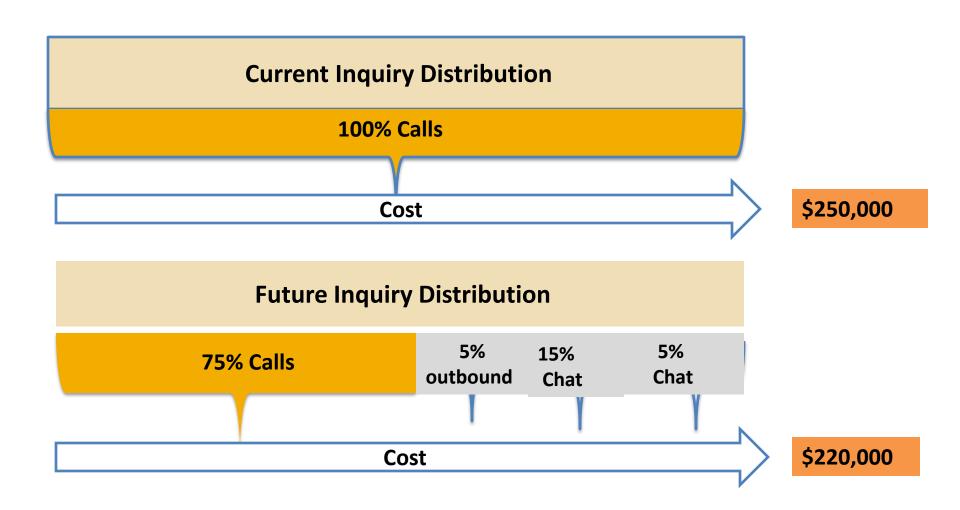


The CMD Approach



Outbound Communications throughout the year

Communication Mix Will Impact Cost

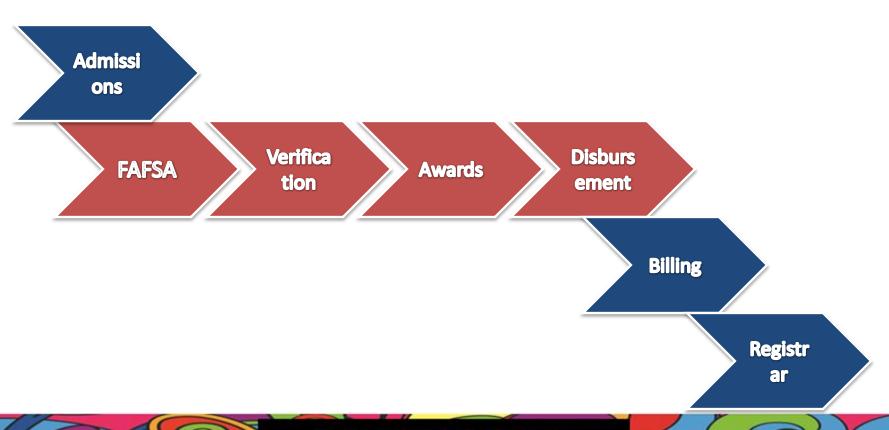


Where Do You Start?

- You Have to Have the Data and Metrics to Identify and Address the Problems
- Call Reasons + Call Volume = Solutions
- Detailed Activity Documentation and Reporting are key!

Understanding and Documenting the Issues – Activity Tracking

Identify and Report on where student inquiries originate within the enrollment process.



Activity Tracking - FAFSA

Call Category Report - Example Month

FAFSA	Calls	Percentage
FAFSA	45	34.6%
FAFSA Errors	5	3.8%
Pin / Signature	2	1.5%
SAP	45	34.6%
Admissions status	11	8.5%
Pell LEU	5	3.8%
UEH	1	0.8%
Loan Eligibility / Agg limits	4	3.1%
Default	6	4.6%
Citizenship	1	0.8%
Selective Service	1	0.8%
Bankruptcy	0	0.0%
Loan Discharge	1	0.8%
Over payment resolution	3	2.3%
Totals	130	100%

2013 CASFAA Conference

Activity Tracking – Verification

Verification	Calls	Percentage
Verification	129	53.1%
Verification documents	85	35.0%
Special Conditions	12	4.9%
Dependency Override	17	7.0%
Totals	243	100%

Activity Tracking – Awards

Awards	Calls	Percentage
Awarding	212	32.7%
Cost vs Aid	87	13.4%
COA / Budget	24	3.7%
Grants	49	7.6%
Work-study	13	2.0%
Scholarships	55	8.5%
Loans	125	19.3%
Third party billing	83	12.8%
Totals	648	100%

Activity Tracking – Disbursement

Disbursement	Calls	Percentage
Disbursement	135	36.3%
High school transcripts	19	5.1%
SAP / Academic requirement	79	21.2%
Enrollment level or start	53	14.2%
MPN / EC / Loan application	86	23.1%
Totals	372	100%

Activity Tracking – Billing

Billing	Calls	Percentage
Refunds	99	35.2%
Balance inquiries	86	30.6%
Payment options	12	4.3%
Tuition fees and housing	29	10.3%
Holds	32	11.4%
Collections	1	0.4%
Drop or withdrawal	19	6.8%
1098T	3	1.1%
Totals	281	100%

Call Volume Tracking



Sample University

Sample Day by Hour Auto-Email Report

Queue by Hour Daily Report

							Call Dura	tion									
Time Start	Total Calls Off'd	Total Calls Ans'd	Ans by 1st	Ans by 2nd	Ans by 3rd	Ans by 4th	TTA Avg Total Secs h:mm:ss	Avg	Total Long Aband	TTAb Avg Secs	Total Short Aband	Sh Ab Avg Secs	Total Calls Inter	TTInt Avg Secs	TSF %		Avg Avail. Agents
04:00	0	0	0	С	0	0	0 0:00:00	0	0	0	0	0	0	0	0.00	0.00	0.00
05:00	0	0	0	C	0	0	0 0:00:00	0	0	0	0	0	0	C	0.00	0.00	0.00
06:00	0	0	0	C	0	0	0 0:00:00	0	0	0	0	0	0	C	0.00	0.00	0.00
07:00	0	0	0	C	0	0	0 0:00:00	0	0	0	0	0	0	C	0.00	0.00	0.00
08:00	0	0	0	C	0	0	0 0:00:00	0	0	0	0	0	0	0	0.00	0.00	0.19
09:00	17	17	17	C	0	0	8 2:19:32	492	0	0	0	0	0	c	100.00	100.00	6.54
10:00	42	42	42	C	0	0	26 2:47:59	240	0	0	0	0	0	C	90.48	100.00	7.89
11:00	39	38	38	C	0	0	24 3:24:05	322	0	0	1	21	0	C	92.31	100.00	7.62
12:00	41	40	40	C	0	0	20 3:19:24	299	0	0	1	30	0	C	97.56	100.00	8.19
13:00	40	39	39	C	0	0	47 2:37:12	242	0	0	1	1	0	C	80.00	100.00	5.44
14:00	39	38	38	C	0	0	27 2:29:23	236	1	58	.0	0	0	C	89.74	97.44	5.22
15:00	38	35	35	C	0	0	55 2:39:44	274	1	244	2	3	0	C	81.58	97.22	5.72
16:00	38	38	38	C	0	0	96 2:49:15	267	0	0	0	0	0	C	60.53	100.00	4.43
17:00	29	24	24	C	0	0	357 1:56:13	291	3	274	2	26	0	C	17.24	88.89	2.68
18:00	0	0	0	C	0	0	0 0:00:00	0	0	0	0	0	0	C	0.00	0.00	0.07
19:00	0	0	0	C	0	0	0 0:00:00	0	0	0	0	0	0	C	0.00	0.00	0.00
20:00	0	0	0	C	0	0	0 0:00:00	0	0	0	0	0	0	C	0.00	0.00	0.00
21:00	0	0	0	C	0	0	0 0:00:00	0	0	0	0	0	0	c	0.00	0.00	0.00
22:00	0	0	0	С	0	0	0 0:00:00	0	0	0	0	0	0	C	0.00	0.00	0.00
Totals	323	311	311	0	0	0	64 24:22:47	282	5	225	7	16	0	0	79.57	98.42	4.91

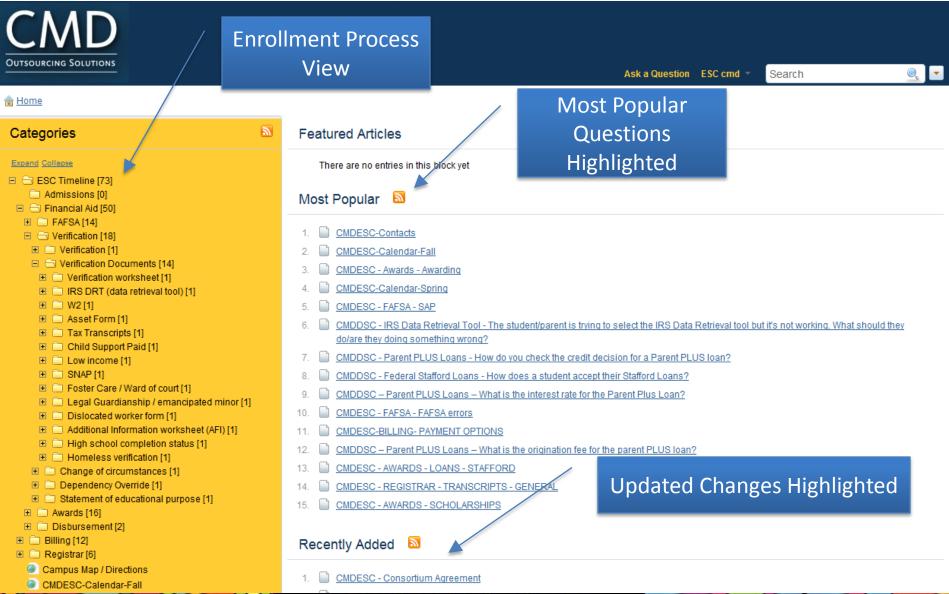
^{*} Real data but the client name has been removed in accordance with confidentiality requirements.

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Shared Knowledgebase

- Stores all information related to supporting a particular department(s)
- Accessible by CMD & School staff
- School FAQ's easily accessed on landing page
- Information structured to mirror processing
- Easy search functionality
- Hosts imbedded files (PDF) forms
- Links to expanded answers & Banner screen names
- School and vendor answer consistency

Knowledgebase Structure





Example of Tax **Transcript**

Ask a Question ESC cmd

0

Search



Home → ESC Timeline → Financial Aid → Verification → Verification Documents → Tax Transcripts



0 Rating/ Voters

Definition

Process

Timing

Calendar

Categories

Expand Collapse

- ☐ SESC Timeline [73]
 - Admissions [0]
- ☐ ☐ Financial Aid [50]

- Werification [1]
- Documents [14]
- worksheet [1]
- retrieval tool) [1]
- ⊕ W2[1]
- Asset Form [1]
- ☐ ☐ Tax Transcripts [1]
 - CMDESC -Verification -Tax transcripts
- Child Support Paid [1]
- Low income [1]
- Ward of court [1]
- # Legal Guardianship / emancipated minor [1]
- Dislocated worker form [1]

CMDESC - Verification - Tax transcripts

Author: Nate Sutorius Views: 1 Last Updated: 11-14-2013 06:32 PM

CMDESC - Verification - Tax transcripts

Contacts

Campus Map



Calendar:

Fall

Spring

Summer

Example of Tax **Transcript**

What is: Tax transcript

Tax return transcript shows most line items from your tax return (Form 1040, 1040A or 1040EZ) as it was originally filed, including any accompanying forms and schedules. A picture of what the transcript looks like is below. A tax transcript can only be obtained after an individual has completed filing taxes with the IRS.

Internal Revenue Service



How to CMD: Tax transcript

How does CMD identify if a tax transcript is needed?

Where is this information in Banner

Go to the "missing documents" (RRAAREQ) screen in banner. The tax transcript will be listed as PIRSXX (Parent) or SIRSXX (Student).

Applicant Requirements RRAAREQ 8.18 (PRC	OD) 000000000000000000000000000000000000		rocestos 🗡
Aid Year: 1314 Diplicant Requirements Perkins MPN Detail	Additional Requirements	♣ Create Person	
Summary Tracking Group: VIDPVF Dependent Request Letter Lock Group Holds exist	t Verify Filers V1 Unsatisfied Promissory Notes exist Additional Requirements Unsatisfied Period Requirements exist	All Requirements Complete: Packaging Requirements Complete: 03-APR-	2013
Create Requirement	Delete Requirement	Disbursement Requirements Complete: 15-JUL-	2013
Requirements Requirement	Status Options Status Established Status Date Date	Disbursement Requirements Complete: 15-JUL- Perkins Satisfied MPN Fund Period Syste	
Requirements Requirement	Status Options Status Established	Disbursement Requirements Complete: 15-JUL- Perkins Satisfied MPN Fund Period Syste	
Requirements Requirement	Status Options Status Established Status Date Date	Disbursement Requirements Complete: 15-JUL- Perkins Satisfied MPN Fund Period Syste	
Requirements Requirement T ENTRAN Entrance Counseling	Status Options Status Established Status Date Date Status Date 20-MAR-2012	Perkins Satisfied MPN Fund Period Syste	
Requirements Requirement ENTRAN Entrance Counseling FAFSA Federal Student Aid	Status Options Status Established Status Date Date Status 21-AUG-2012 S 26-FEB-2013 S 26-FEB-2013	Perkins Satisfied MPN Fund Period System Tourishing Polysub My B	

How to Student: Tax transcript

. How does the student obtain a tax transcript?

What does the student need to do?

Only after a student has filed taxes with the IRS can a transcript be obtained. Transcripts cannot be received by the student and then sent to the school. There are four ways to obtain a transcript, but a student should always first be directed to use the IRS DRT tool on FAFSA, to eliminate the need of the tax transcript. If a student does not qualify to use the IRS DRT, then they should request a tax transcript online or visit their local ITS office.

Online: Go to www.irs.gov. On the right hand side under tools choose "order a return or account transcript". On the next screen under step three choose to order a transcript. Fill out the requested information. Tax transcripts can ONLY be MAILED! The address entered on the site is the address the tax transcript will be sent to.

Phone: Call 1-800-908-9946

Mail request: Complete form 4056T and mail it or fax it to: RAIVS Team Stop 6705 P-6 Kansas City, MO 64999

In person: visit your local IRS office.

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How long does it take?

Processing time: Tax transcripts

The IRS states it will 5-10 days to receive a tax transcript once ordered. Note this is to receive the transcript. The normal verification processing time is in addition to this.

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Why Consider Outsourcing

- More Productive Investment
- Mitigate Staffing and Training Cost
- Accelerate Administrative Processing
- Improve Student Service/Retention
- Access Current Technology
- Transform Customer Service into an Asset

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