



## **Student Financial Assistance**

### **Deliverable 77.5.1**

#### **Confirm Approach to Front-Load Savings:**

##### **Task Order Summary:**

The Consistent Answers Definition and Preliminary Design initiative was approved by IRB on April 5, 2001. During this initiative, the Consistent Answers team conducted extensive discovery and evaluation of the current environment, created a target state customer service environment, and developed a business case and sequencing plan to transform SFA customer service. The Confirm Approach to Front-Load Savings deliverable (77.5.1) identifies opportunities to recognize savings early in the sequencing plan. The deliverable was presented to IRB on September 9, 2001.

SFA's customers and delivery partners are serviced by DC, regional offices, and eleven major contact centers. Each customer service area has unique phone numbers, email addresses, contact history databases, and contract parameters for cost and performance metrics. Most of the customer service areas operate largely independently of one another and employ individual strategies, processes, and technologies to deliver customer service.

The current customer service environment makes it difficult for customers and delivery partners to interact with SFA. The segmented information makes it time consuming for customer service representatives and SFA employees to access and understand a customer and/or delivery partner's complete experience with SFA. The current customer service environment does not optimize SFA's ability to serve customers and delivery partners and the silos of information contribute to excess costs through duplicated work and misdirected inquiries.

The Consistent Answers team leveraged the work and findings from completed and current projects including the Call Center IPT, the implementation of the new Ombudsman Case Tracking System, the Schools CRM Storyboard project, the School's Institutional Data View project, eServicing, and the Financial Partners Square One initiative.

The information for this deliverable was collected from Consistent Answers contract analysis, SFA employees, and MCI telephony experts.

##### **Deliverable Summary:**

Deliverable 77.5.1 was presented to IRB on September 9 2001.

##### **The objective of the Confirm Approach to Front Load Savings Deliverable:**

- Identify opportunities to front-load savings through optimizing the current customer service delivery environment
- Define potential solutions for meeting the FY2001 Performance Goal: "Launch a single, toll free, 'One Call Does It All' number for student customer service that will allow access to any call center"

##### **Key milestones completed during June and July:**

- Identify recommendations for early realization of benefits as it relates to streamlining the customer service environment
- Define potential solution and implementation approach for launching single, toll free, 'One Call Does It All' number for student customer service that will allow access to any call center



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### **Deliverable 77.5.1 Confirm Approach to Front-Load Savings:**

#### **Table of Contents**

<b>Section Title</b>	<b>CA Team</b>	<b>Summary</b>
Recommendations	Process Design / Central IVR	Presentation delivered to the Steering Committee and IRB outlining the opportunities to "Front Load Savings" through contract improvements and deferring the One Contact Number for Students until a later stage.
Contracts Scorecards	Process Design	Assessment of current contract components compared to best practice or reasonable target metrics.
IVR Design	Central IVR	Documentation for a conceptual design of the One Contact Number for Students telephony plan.