

Customer Service Training 2024

Student Support Key Phrases

1. Kiosk and Front Desk
2. Telephone Call Handling
3. Challenging Compassionate Conversations



**University of
Central Lancashire**
UCLan

Student Support - Kiosk/Front Desk Key Phrases

Kiosk

Welcome	Hello ...How are you today? Please sign in with your student registration number How can we help you today?
Follow Up	My colleague will see you shortly. The team are still busy, but they know you are waiting. The wait times are fairly long today would you like to come back another time or email your query into student support?

Front Desk

Opening	How can I help you? I can see you are here today for ... Hi ...my name is **** how can I help you today?
Checking Information	Please can I just check So, to confirm the details are ... Just to clarify... Am I correct in saying
Creating a Rapport	How are you enjoying your studies/course? Do you have any lectures today? Will you be going home for the holidays? Are you looking forward to graduation? How are finding Preston? What are your future plans with your qualification?
Empathy	I can see you are upset, please tell me as much as you can. This must be upsetting for you; I will try my best to help you
Closing	Goodbye, have a good day. Thank you see you soon. Please come back if you need further assistance.
Avoid	Jargon - SFE, CA, AR Familiar terms - mate, pal, love

Student Support - Call Handling Checklist

Opening	
Greeting	<ul style="list-style-type: none"> Greeting: "Good morning/ afternoon". Mention 'Student Support'.
Identify the caller.	<ul style="list-style-type: none"> Ask for student ID number. Find another way to search if there is no ID number e.g., name and date of birth (verify 2 things to make sure you're in the right record). Advise the student where to find their ID number/ offer to give it to them if they don't know it. If you can't find an ID number, ask which campus they're on - they may be a partner campus student.
Find out what the query is.	<ul style="list-style-type: none"> "How can I help you today?"
Problem	
Apologise/ thank if needed.	<ul style="list-style-type: none"> "I'm sorry this hasn't been resolved yet".
Allow the caller to offload without unnecessary interruptions.	<ul style="list-style-type: none"> Let them talk without interruption whilst they tell you what their query is.
Ask specific questions to understand the issue/ gain information from the caller to advise correctly.	<p>E.g.</p> <ul style="list-style-type: none"> No payment received from SFE: "Have you received a letter of entitlement?" Can't access blackboard: "Have you made your fee payment?" Need a letter: "Have you requested your letter on the Student Hub?" Unwell: "Is this a long-term condition?" "Do you have any support in place?"

Use positive language.	<p>E.g.</p> <ul style="list-style-type: none"> • “No problem, I’ll look into this”. • “I’ll find out for you”.
Solution	
Explain what the student needs to do, pre-empt, and address anything that the student may come back with later.	<p>E.g.</p> <ul style="list-style-type: none"> • “Student Finance is completely separate to UCLan, so you do need to get in touch with them directly for more information. I can give you their number, have you got something to make a note of it?” “If you’re unsure after speaking to them, just give us a call so we can look into it”. • When you direct them to the Student Hub, break down the steps. Explain as if you’re explaining to someone who has no idea what the Student Hub is without being patronising. • Cover all areas. E.g., If you are telling them to request a letter, give them a time frame/ tell them what the next steps are (how it works)/ let them know how they’ll receive the letter.
Explain what will be done on our side and any steps that you have taken.	<ul style="list-style-type: none"> • “The Fees and Funding team are the team who communicate with Student Finance, I’m just going to send them a message for you now”. • “Your school updates your record, so I need to discuss this with them. I’m just going to call them now”. • “I’m sending you an email to your UCLan email address with the link to...”
Control the conversation.	<ul style="list-style-type: none"> • Don’t go around in circles with the caller. • Be clear on what you can and can’t do. • Be efficient, you don’t need to be on the phone for an hour to resolve one query (typically).
Explain any process relevant to the query - avoid jargon.	<p>E.g.</p> <ul style="list-style-type: none"> • “When you submit your letter request, it comes through to us and they’re made on a first come, first serve basis. When yours has been produced you’ll receive an email from us. If there are any issues with producing your letter, we’ll get in touch with an update. Please keep an eye out

	on your UCLan/ personal email address. Can you access this?"
Be direct and factual.	<p>E.g.</p> <ul style="list-style-type: none"> • "This isn't something which I can speed up for you". • "The only way to apply for Mitigating Circumstances is by submitting the form on My UCLan. You can find a guide to help you fill out the different sections in the form on the Student Hub...." • "The Hardship Fund isn't an emergency fund, have you got any financial support until a decision has been made on your application?"
Closing	
Ask if there is anything else that they need help with.	<ul style="list-style-type: none"> • "Is there anything else that you wanted to talk about today?" • "Is there anything else that I can help you with?"
Summarise the solution.	<ul style="list-style-type: none"> • Keep this concise. <p>E.g.</p> <p>"Make sure you submit your letter request online and once it's ready you'll receive an email".</p>
Apologise/ thank where appropriate.	<ul style="list-style-type: none"> • Don't over apologise, do it when it's necessary. <p>E.g.</p> <p>"Sorry that I'm not able to solve this for you whilst you're on the phone. I have messaged X team and when there's an update we'll be in touch".</p>
Greet the caller.	<ul style="list-style-type: none"> • Keep the ending short, sweet and appropriate to the situation. <p>E.g.</p> <p>"Take care, I hope you feel better soon".</p> <p>"Have a nice day".</p> <p>"Enjoy your weekend".</p>
Follow up	
Complete any follow up steps that were discussed on the call.	<ul style="list-style-type: none"> • If you said you're going to message/ chase up with any other team and haven't had a chance to do it whilst on the call - do it now. <p>E.g., Student was in a rush to get off the phone as they had an appointment, so you couldn't send the email whilst on the call. Do it in the follow up section of your call.</p>
Leave clear, concise, and accurate notes.	<ul style="list-style-type: none"> • Make sure your note is straight to the point so that if the student calls again, the next person can easily take relevant information from it whilst they're on a call/ at the front.

- Be factual.

Student Support – Challenging and Compassionate Conversations

Key Phrases to Support your Interactions.

Demonstrate Active Listening	<p>Please take a seat and talk me through what has happened so far.</p> <p>I can see you are frustrated by the situation; please can you talk me through what has happened so that I can familiarise myself with your situation.</p> <p>To avoid you having to repeat yourself unnecessarily, could I ask if you have spoken to our team or anyone else previously, as there may be notes which will save you from repeating yourself.</p> <p>I will just take a few notes while you explain what has happened to help me remember everything you say and to avoid you having to repeat yourself.</p>
Check Your Understanding	<p>So just to check I've got all the facts right....</p> <p>Before I try to answer your query, could I just check I have got everything you've said right?</p> <p>I'll just go through everything you've said to make sure I've got everything – please let me know if there is anything I've missed or not got quite right.</p>
Manage Expectations	<p>Our team is very busy at this time of year, so wait times can be longer than usual – which is why we haven't yet been able to reply to your email / letter request yet.</p> <p>I will need to call X team as they handle XYZ – I will speak to them first to be able to advise you correctly.</p> <p>Unfortunately, our team does not have access to this information / cannot advise on these queries, however you can call/email X team who should be able to answer your queries.</p> <p>This team is not accessible on the phone at the moment, so we will need to send them a message/email to investigate your query – I will send them your query now and ask them to contact you directly, but as they are a different team I cannot guarantee when they will reply.</p> <p>This team is busy at this time of year, so it may take them a few days to reply to your query. If you haven't heard anything back by X date, then</p>

	<p>please call this number / return to see us and we will try to reach them again.</p>
Acknowledge circling	<p>I know this isn't the response you were hoping for, I have provided all the information I can, please let me know if anything wasn't clear.</p> <p>I have provided all the answers I can provide to your query - if you need a moment to process this that is understandable and if you have further queries, please let us know.</p> <p>I am happy to repeat and clarify if required and provide you with a follow up email to confirm what we have discussed for your reference.</p>
Showing understanding	<p>I know this isn't the response you were hoping for, however I think honesty is important, so you have the right information to plan your next steps.</p> <p>I imagine this is very difficult for you and would like to support you in the best way I can.</p> <p>I can see this is causing distress and I want to make sure that you are well supported at this time.</p> <p>I know this isn't the decision you were hoping for or expected and imagine this is a lot to process, please let me know how I can support.</p> <p>I can see the outcome of this is upsetting you, would you like to speak to someone about your wellbeing needs in a more private setting?</p>
Setting boundaries/ De-escalation	<p>Please lower your voice.</p> <p>Please let me explain.</p> <p>Please listen to the information I have.</p> <p>Please know I am trying my best to answer your query.</p> <p>Please can I ask for your patience while I familiarise myself with your case.</p> <p>Please can I ask that you listen to and answer the questions I have so that I can try to help you.</p>

Financial Queries

Student Funding - CHASE it up!

Current	<p>Check student's current course and year.</p> <p>Check their current funding situation.</p> <ul style="list-style-type: none"> • <i>Have they applied? When? What type of funding? Which academic year have they applied for? What year of study have they applied for?</i> • <i>What is their residency status? UK or EU? If EU, pre-settled or settled?</i>
History <i>For funding applications which have not been approved or are struggling to be approved</i>	<p>Check for any repeated years on their current course.</p> <ul style="list-style-type: none"> • <i>Were there any personal circumstances which impacted their ability to successfully complete the years which had to be repeated?</i> • <i>If so, have they tried applying for Compelling Personal Reasons to regain a funding year?</i> <p>Check if they have any previous study, here or elsewhere.</p> <ul style="list-style-type: none"> • <i>Did they receive funding?</i> • <i>Type of degree? How many years of study (including non-completed years)?</i> • <i>Any previous equivalent qualifications gained?</i>
Account (SFE)	<p>Student Finance portal</p> <ul style="list-style-type: none"> • <i>Have they checked it? Can they show you now?</i> <p>Student Finance advice</p> <ul style="list-style-type: none"> • <i>Have they called the funding provider? What did they say?</i>
Sponsor <i>For students concerned they are receiving the minimum maintenance</i>	<p>Is the student receiving minimum maintenance loan?</p> <ul style="list-style-type: none"> • <i>Were they expecting this? Do they know their home household income situation?</i> <p>Sponsors / Household information</p> <ul style="list-style-type: none"> • <i>Who else lives in their home household? Who is providing the household income information?</i> • <i>Have they provided their income information to support the student's maintenance loan assessment? (The student will only receive minimum without household income information being provided)</i>
Enrolment	<p>Check Banner for the following:</p> <ul style="list-style-type: none"> • <i>Are they enrolled? ID checked? SSN provided?</i> • <i>Have SFFT confirmed registration / attendance</i>

Gathering Information (to assess eligibility for UCLan funds & bursaries)	
Key Questions	<ul style="list-style-type: none"> • What funding do you have in place? • Do you have any other sources of income? • Do you have any financial dependents (e.g. children, registered carer)? • Are you care-experienced or estranged? • Do you have health-related inability to work? • The financial challenges of studying at university are well-publicised/known, but has anything changed in your living circumstances since the start of your course which has unexpectedly impacted/affected your finances?
Unexpected costs?	<ul style="list-style-type: none"> • What was/is the nature of the unexpected cost? • When did the unexpected cost occur? • An application for financial support would require evidence of the expense, do you think you will be able to provide evidence of the expense? • Have you sought any external support or guidance? <p>*Refer to Financial Support 2nd line for further guidance once you have gathered this information.</p>

International Student

Showing Interest / Building a Rapport

New Starters

- When did you arrive?
- How was your journey here?
- Is this your first time in Preston? The UK?
- Has there been anything surprising so far?
- Do you have family/friends here?
- Have you met your classmates yet? Do you know where your classes are going to be?
- Is your accommodation close or far away? (Good opportunity to check if they have updated their term time address)
- Are you interested in visiting different cities? (Do you know about the student railcard?)
- Did you participate in any sports or other clubs at home? Have you heard of the Student's Union?

Current Students

- How has your week been so far?
- How are your classes going?
- Have you had any assignments/exams recently?
- Are you enjoying it here? Do you have family and friends here or are they all back home? Are they planning to visit or will you go home to visit them?
- Have you visited the local area since arriving?
- Have you joined any clubs with the Student's Union?

Finalist / Graduating Students

- How are your exams going? Have you finished now?
- Do you have any fun plans while you await your results?
- Are you looking forward to graduation?
- Have you received any information about graduation?
- Are you going to be inviting family or friends for graduation?
- Have you got any plans after graduation?

Wellbeing Support

Key Questions / Phrases	<ul style="list-style-type: none"> • Would you like to take a seat? Can I get you a tissue? Can I get you a glass of water? • Would you like to talk here or somewhere quieter? • (On the phone) If you haven't already, take a seat and take a deep breath, and, when you're ready, talk me through what has happened and how you would like us to help. • (On the phone) Is there anyone there with you who can support you? • Take your time, it's okay if you're not sure who can help or where to start, we can do our best to support you and point you in the right direction. • Have you heard of our Student Support Drop-In area? It's a quiet, more secluded area where you can drop by, without appointment, to have a 1:1 chat with one of our colleagues about any difficulties you are experiencing during your studies. They can refer you to other support services internally and externally for further support. Would you like me to walk you there? • Have you spoken to family or friends to ask for support? Are they supporting you? • Have you been in contact with the Wellbeing services? • Do you know how to make an appointment?
-------------------------	---

Bereavement

Student	<ul style="list-style-type: none"> • I'm so sorry to hear of your loss. Are you being supported by family and/or friends at this time? • Have you been in contact with the university wellbeing support services? • Have you heard of our Student Support Drop-In? • Do you think you are able to answer a few questions, just to check if there is any support the university can provide beyond wellbeing support? • Can I ask when your _____ passed away / when was their funeral? • Have you been responsible for any of the funeral costs or have there been any travel costs to attend the funeral?
Third Party (bereaved by a student death)	<ul style="list-style-type: none"> • I'm so sorry to hear of your loss. Are you getting support from family and/or friends? • Could I ask you to confirm your name? Your relationship to the student? Your _____'s name? Best contact details? • I will call the Wellbeing Team who can provide further guidance and support in these circumstances. Is it okay if I put you on hold a moment while I call them?

