



WASFAA Training Committee Presents

# REIMAGINING THE FINANCIAL AID EXPERIENCE

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# 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!**

# PRACRYICAL 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

Kinni, pp. 37-38



# 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

Kinni, pp. 40-41



## 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

Kinni p. 48-52

# 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/HOESSE	Frontline employee




# BEHAVIORS OF QUALITY SERVICE



Performance Tips

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



Performance Culture

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

Walt Disney World Resort

Make eye contact & smile!

Seek out guest contact


Preserve the “magical” guest experience

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

Kinni, pp. 100-101



# 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 FAO

COMPLAINTS

- It's confusing
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- Always get a different answer

- My situation is different
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Process Design

Customer Flow

Communication

Special Needs

# CUSTOMER FLOW

Wait time affects nearly every industry

Solutions:

Optimize operations


Anticipate peak times and work to level traffic

Optimize customer flow

Give customers information up front to let them choose

Optimize waiting experience

When waits are unavoidable, make waiting more enjoyable



Kinni, pp. 134-139

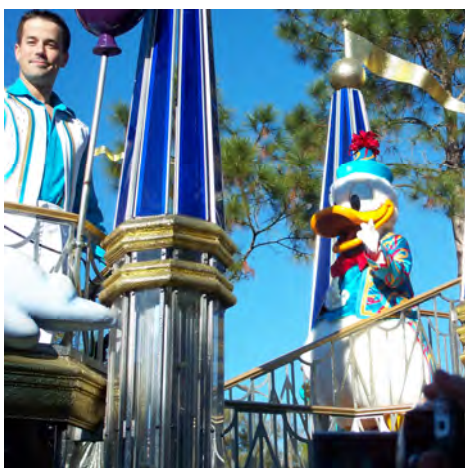


## PERCEPTIONS

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

Kinni, pp. 143-145







## DEBUGGING IN THE FAO

Flawed Processes	<ul style="list-style-type: none"> <li>• Re-think ultimate goals and find alternatives to deliver, provide information</li> </ul>
Outdated Processes	<ul style="list-style-type: none"> <li>• Automation, software enhancements, new software on campus</li> </ul>
Customer-owned Processes	<ul style="list-style-type: none"> <li>• People make mistakes, but our area can take the brunt even if it's not our process. (FAFSA, loan applications, etc.)</li> </ul>



## 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

Kinni, pp. 148-149




## 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
Quality Standard #1			
Quality Standard #2			
Quality Standard #3			
Quality Standard #4			

## 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