

## Customer Service Best Practices for Student Affairs and Enrollment Management Units Commitment to Service, Teamwork, Diversity, Equity and Inclusion:

Based on our shared [SAEM values](#) - Position Descriptions (all position descriptions in SAEM should include the following duty/responsibility)

- Express genuine gratitude and appreciation for our colleagues' daily efforts.
- Communicate honestly, respectfully, and directly while welcoming feedback and dialogue.
- Invite broad perspectives and experiences for inclusive decision making and planning; pausing efficiency and embracing dialogue.
- Consciously welcome and respect visitors and all members of our NDSU community.
- Promote a community of belonging, recognizing unique differences as strengths of the community.
- Work towards understanding of others and self.
- Actively contribute to inclusive and equitable practices that influence individual and systemic change.
- Identify opportunities to eliminate barriers resulting from individual and systemic inequities and biases.

**And being mindful of [NDSU's Mission, Vision, and Core Values](#):**

**Mission:** We provide transformational education, create knowledge through innovative research, and share knowledge through community engagement that meets the needs of North Dakota and the world.

**Vision:** To lead the advancement of our land-grant ideals through innovative education, research, and outreach.

**Core Values:** Collegiality, Community, Creativity, Excellence, Inclusivity, Impact, Innovation, Integrity, Resilience, Responsiveness, and Transformation.

### **In-Person:**

- Wear your nametag
- Acknowledge visitors promptly when they arrive in your office and ask how you may assist them
- Acknowledge all visitors to your building and provide assistance in finding offices/staff
- Use the individual's name, especially in a greeting or farewell

- Maintain eye contact; smile
- Know your boundaries – If you are unsure of an answer, don't make it up!
- Seek out professional training/development opportunities
- Acknowledge and recognize colleagues' exceptional service
- If referral is needed:
  - provide detailed next steps & call ahead to ensure the person is available
  - clarify the person understands the next steps 2

**Office/Colleague Interpersonal Communication:**

- Establish and maintain a good working relationship with coworkers and management. Resolve differences constructively.
- Use tact and courtesy under stress.
- Assist other unit personnel in the performance of their duties when necessary. Respect the value and individuality of all persons without regard to age, ethnicity, gender, mental and physical ability, race, religion or sexual orientation.
- Attend and participate in training opportunities.
- Speak politely and clearly. Offer assistance and answer questions courteously and tactfully.
- Answer phone courteously; identifying location, self and offering assistance.
- Respect customer confidentiality and follow FERPA guidelines.
- Recognize obligations to others. Follow policies and procedures.
- Meet work schedule, including on-time arrival to be ready to serve customers and to be respectful to co-workers.
- Send the entire team an update when late, sick, etc.
- Be a positive role model for other staff.
- Work closely with student employees, offering guidance and providing a positive work environment.
- Dress appropriately to meet department requirements. This applies whether you are working in the office or remotely from home. Maintain a clean and professional work space.

**Phone:**

- Smile when answering the phone ☺
- Answering incoming calls
  - Identify office and self by name
    - Sample: {Your office name}. This is {your name}. How can I help you?

- Avoid blind transfer
  - When transferring a caller to another person/office, stay on the line to announce the call to the next person. This ensures there is another person that the caller will be able to talk to. If the call goes to voicemail, check with caller to see if they would like to leave a message. Instructions are as follows:
    - Digital Instructions
      - Press **Transfer**
      - Dial the number to which the call will be transferred
      - Press **Talk Now**
      - Wait for the part to answer, announce the call
      - Press **Complete** and hang up
    - If the call goes to voicemail:
      - Press the flashing active line to return to your caller.
    - Telephone information:
      - [Telephone Information and Instructions](#)
      - [Phone Quick Reference Guide](#)
      - [Additional Phone Info](#)
- Voicemail
  - Sample: This is {your name} in the NDSU {your office name}. I'm sorry I missed your call. Please leave a message and I will return your call as soon as possible. For immediate assistance from another staff member in {your office name}, please press zero. If you would like to leave me a message, please do so after the tone. Thank you and have a great day.
  - Return messages/acknowledge receipt, use the individual's name, and provide status report within 24 hours
  - At the end of each phone conversation, ask if there is any further assistance you can offer. Thank the caller.

**Email:**

- Return messages/acknowledge receipt and provide status report within 24 hours
- Use the individual's name in the body of your message
- Activate Out of Office reply if gone more than one day
  - Sample: {Greeting}, I am out of the office and will return on {date of return}. For urgent matters, please contact {contact person} at {contact information – email or phone}. Thank you.
    - Instructions:
      - Open Outlook. Click on the "File" tab in the upper left-hand corner.

- Ensure the “Info” option in the left column is selected. On this Account Information page, select “Automatic Replies (Out of Office)”.
- When the Automatic Replies box opens up, select “Send automatic replies”. Check the box “Only send during this time range:” Enter your start and end dates.
- In both the Inside My Organization and Outside My Organization tabs, enter your automatic reply message. Click “OK”.
- Be aware that all email messages can be forwarded. All NDSU email is subject to open records requests.
- Keep replies succinct and specific
- Be aware that at times, a phone call might be a better option
- Keep Outlook calendar up to date, including meetings, lunches, out-of-office, vacation, sick days, working remotely, etc.
- Ensure university email signature is utilized
  - See: [Email Signatures | University Relations | NDSU](#) Updated 8/2022