

Research Administration as Customer Service



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Agenda

- Why Customer Service?
- The Nexus of Customer Service and Research Administration
- Common Tools to Lighten the Load
 - A Customer Engagement Model
 - Writing Effective Emails
 - Time Management Matrix
- Robot Mode

Customer Service

Assistance and advice by an organization to those who buy or use its products and services.¹

Support

- Addressing questions
- Solving problems

Relationship

- Trust
- Commitment

Communication

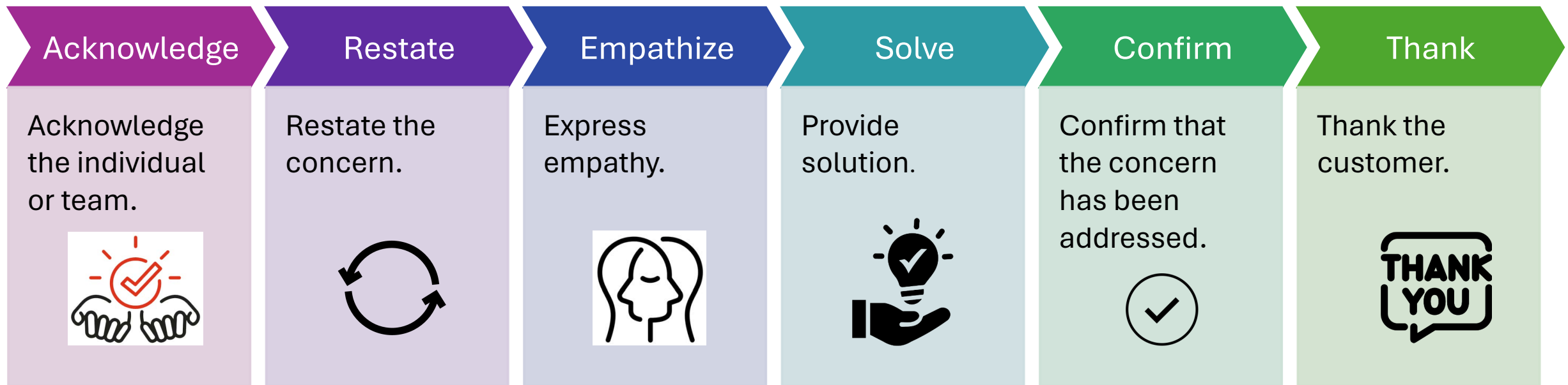
- Responsiveness
- Empathy

A Customer Engagement Model Based on “Call Center Sequencing”



- A process to identify the customers' ask and defuse any frustration.
- The best are able to complete this process without sounding robotic.
- Works with face-to-face, telephone, or email contact.

A Customer Engagement Model



Acknowledge the individual or team

- This is an effort to personalize the engagement.
- If there are specific action items, is the right person engaged?
- It can help determine the level of engagement.

Example: Dr. Lee vs Call me Matt



Restate the concern

- Sometimes you will have to sift through several ideas to get to the concern that needs to be addressed.
 - This will require active listening!
- This step is important: Have you asked the right qualifying questions?
 - Is it a pre-award issue or a post-award issue?
 - Is it a billing concern?
 - Is it a submission formatting concern?
- When you find it, confirm it with a simplified statement

Example: I hear you saying that you are unable to upload the proposal. Is this correct?
- :REPEAT:
 - Keep asking questions until you discover the **WHY** of the call/email/communication
 - You are trying to discover what the customer needs vs. what they're asking for



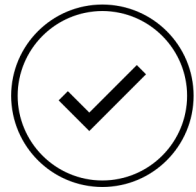
Empathize

- THIS IS NOT AN APOLOGY (If you think of it that way, it will be difficult to do.)
- This is an **acknowledgment** that some processes are tedious, and that some experiences are hard.
- This small statement can go a long way in letting the customer know you understand their POV.
 - Example 1: I understand how frustrating this can be but it is a system limitation.*
 - Example 2: I know formatting can be tedious, however it helps me be sure that I don't remove any important information.*
- An empathetic statement does NOT belong in every interaction.
 - Do not force this to fit. It will make you sound robotic.



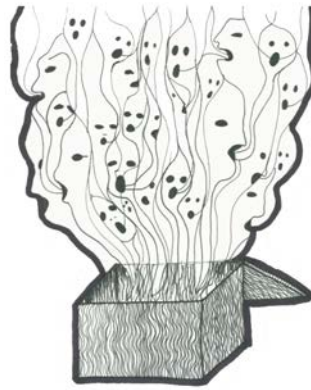
Solve

- Now that you have listened, acknowledged, and expressed empathy, you can discuss a fix.
- *Be gentle:* the fix may mean more work for them.
- *Be gentle:* the fix may be directing them to the right department
 - Be clear in this one.
 - If it is an email, copy the next department in your response and introduce them to the situation. Do not make the customer explain themselves.
- Provide expected times of completion when you are taking action.



Confirm

- Confirm the issue is resolved.
- This feels like Pandora's Box.
 - You are tired now.
 - You have engaged long enough.



- Why ask if there is anything else I can do?
 - Here is a tip: **Don't.**
 - Instead, ask a close-ended question that allows for the discussion to end.

Example 1: Do we have everything we need for this proposal?

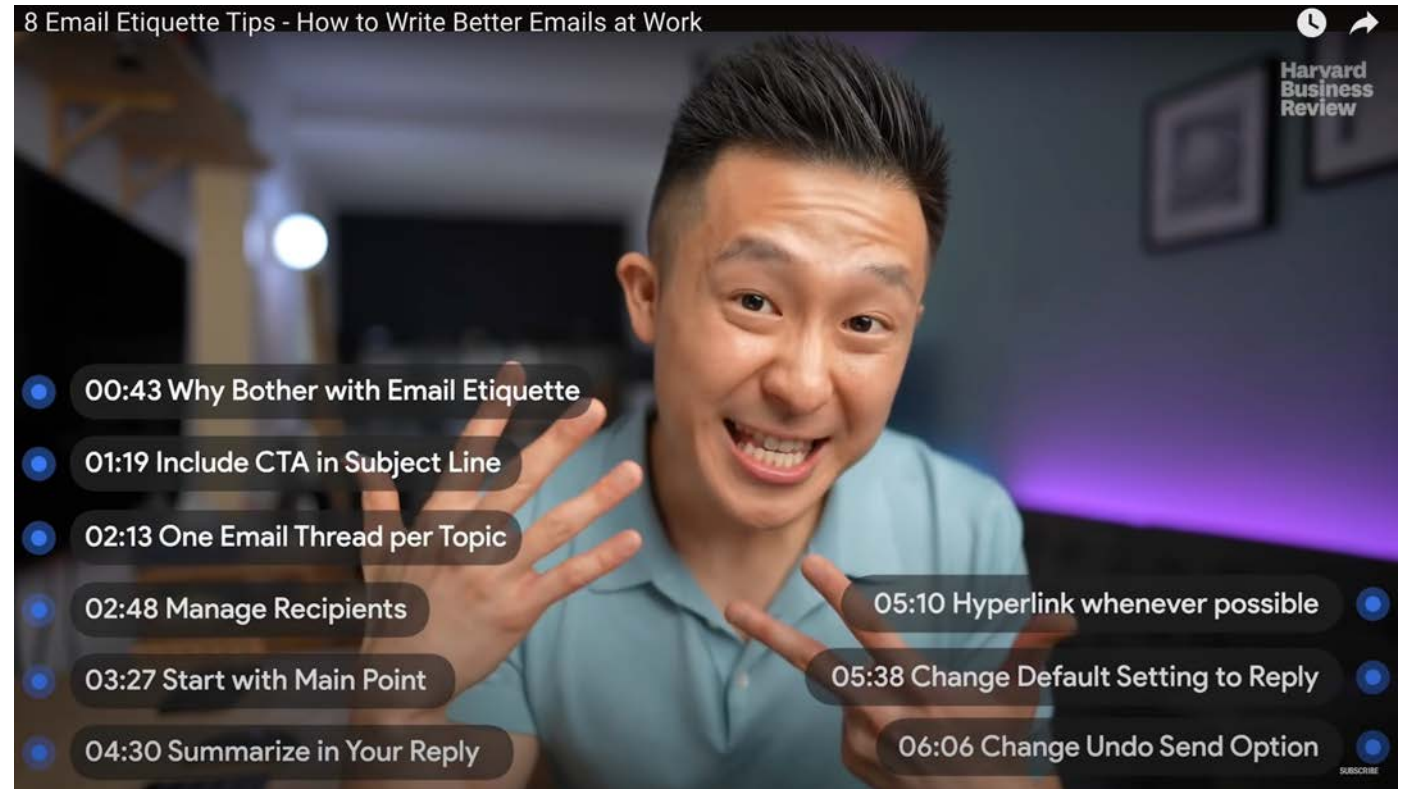
Example 2: I just want to be sure you have contacted your grant fund accountant to help the rest of the way.

Thank



-
- Say thank you.
 - Gratitude goes a long way.
 - If you are an administrator, something that your customer is doing is directly impacting your livelihood.

Writing Effective Emails



Reference: Harvard Business Review's *8 Email Etiquette Tips - How to Write Better Emails at Work*, <https://youtu.be/1XctnF7C74s?feature=shared>

Writing Effective Emails

- Include a call to action in the subject line.
Example: NSF Proposal DUE, upload today!
- One email thread per topic.
Example: Proposal vs. Award
- Manage recipients.
Example: +RFA, -Farin Kamangar
- Start with the main point.
Example: Your NSF proposal deadline is today...

Writing Effective Emails


- Summarize in your reply.

Example: Please email me confirmation that you uploaded your proposal as it is due today.

- Hyperlink whenever possible.

Example: Your [NSF](#) proposal deadline is today...

- Change the default setting to “Reply” (not “Reply all”).

Gmail settings:  Default reply behavior: Reply Reply all
[Learn more](#)

- Change undo send options.

Gmail settings:  Undo Send: Send cancellation period: 30 seconds

NSF Grant Due Today!

Matthew Lee (matthew.lee@morgan.edu)

NSF Grant Due Today!

Please Advise



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Important information for proposers

All proposals must be submitted in accordance with the requirements specified in this funding opportunity and in the NSF [Proposal & Award Policies & Procedures Guide \(PAPPG\)](#) that is in effect...

Dear Colleague Letter

Fundamental Research on Equity, Inclusion, and Ethics in Postsecondary Academic Workplaces and the Academic Profession within the EHR Core Research Program

December 27, 2018

This DCL contains information about a Funding Opportunity

Document number: NSF 19-035

Share



Published: December 27, 2018

- Becca

NSF Proposal DUE, upload today!

Matthew Lee (matthew.lee@morgan.edu), Farin Kamangar (morgan.edu)

NSF Proposal DUE, upload today!

- RFA, + Farin Kamangar

Dear Matthew,

Your [NSF proposal](#) deadline is today.

Please email me confirmation that you uploaded your proposal.

I look forward to hearing from you soon.

All the best,

Becca Steiner (she/her/hers)

Grant Administrator

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Time Management

***As administrators
very few consider
our time relative to
their request.***



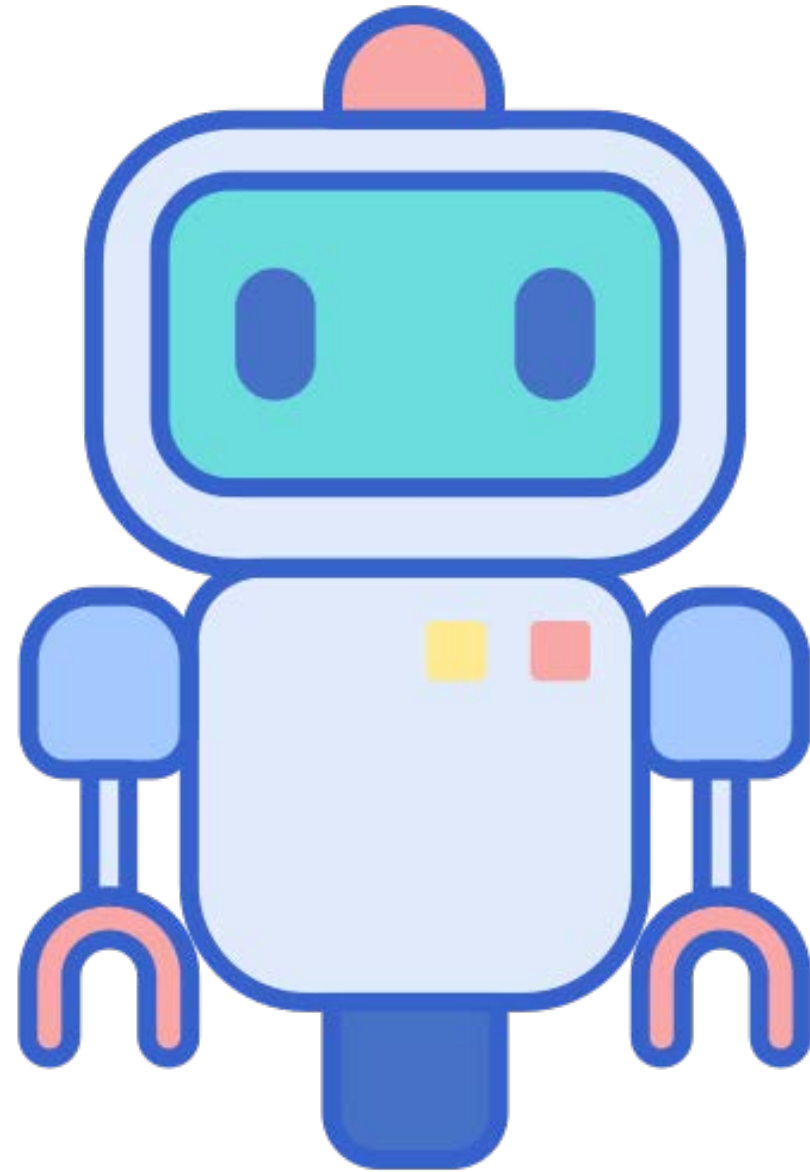
Time Management Matrix**

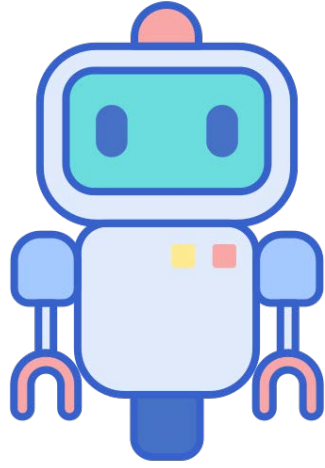
Time Management Matrix



Robot Mode

When is it ok?





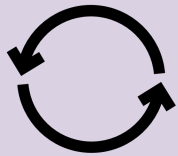
Acknowledge

Acknowledge the individual or team.



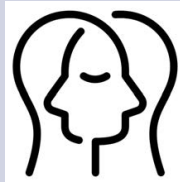
Restate

Restate the concern.



Empathize

Express empathy.



Solve

Provide solution.



Confirm

Confirm that the concern has been addressed.



Thank

Thank the customer.



Questions?

