

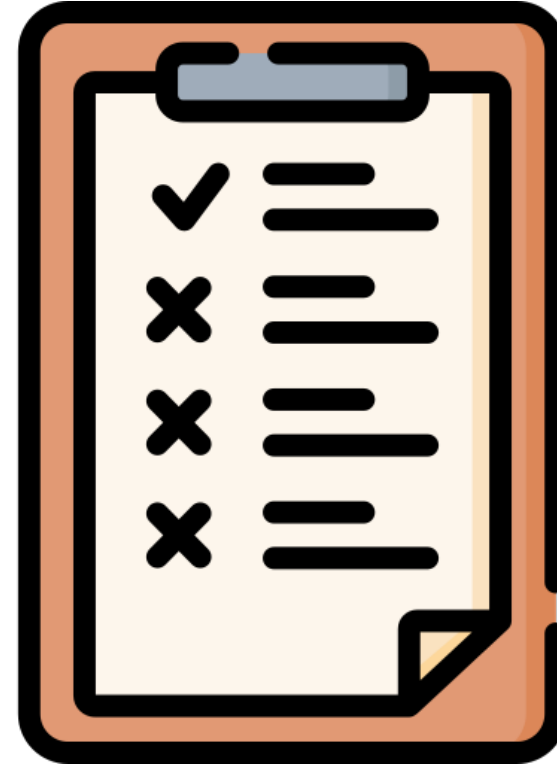
Customer Engagement Management HE Seminar

Robert Wilson

Martin Grimason

Agenda Items

- CEM goals and objectives
- Current service overview
- Live self-serve demo
- Further Enhancements
- Contact breakdown
- Customer Feedback on Chabot and live chat
- Further Service Enhancements



CEM: Aim and Aspirations



CEM is an approach to managing customer service – not a system
This approach focuses on fully and efficiently dealing with customer issues – not dealing with individual tasks



Improving how we view the work we do for our customers

- Focus on customer outcomes, not individual tasks
- Customer issues remain open until they are completely dealt with and the customer is informed of the outcome
- Make sure customers get to people who can fully deal with their issue
- If a customer is struggling with the process, ensure we take ownership of their issue and resolve it



Organising ourselves to best meet customer needs

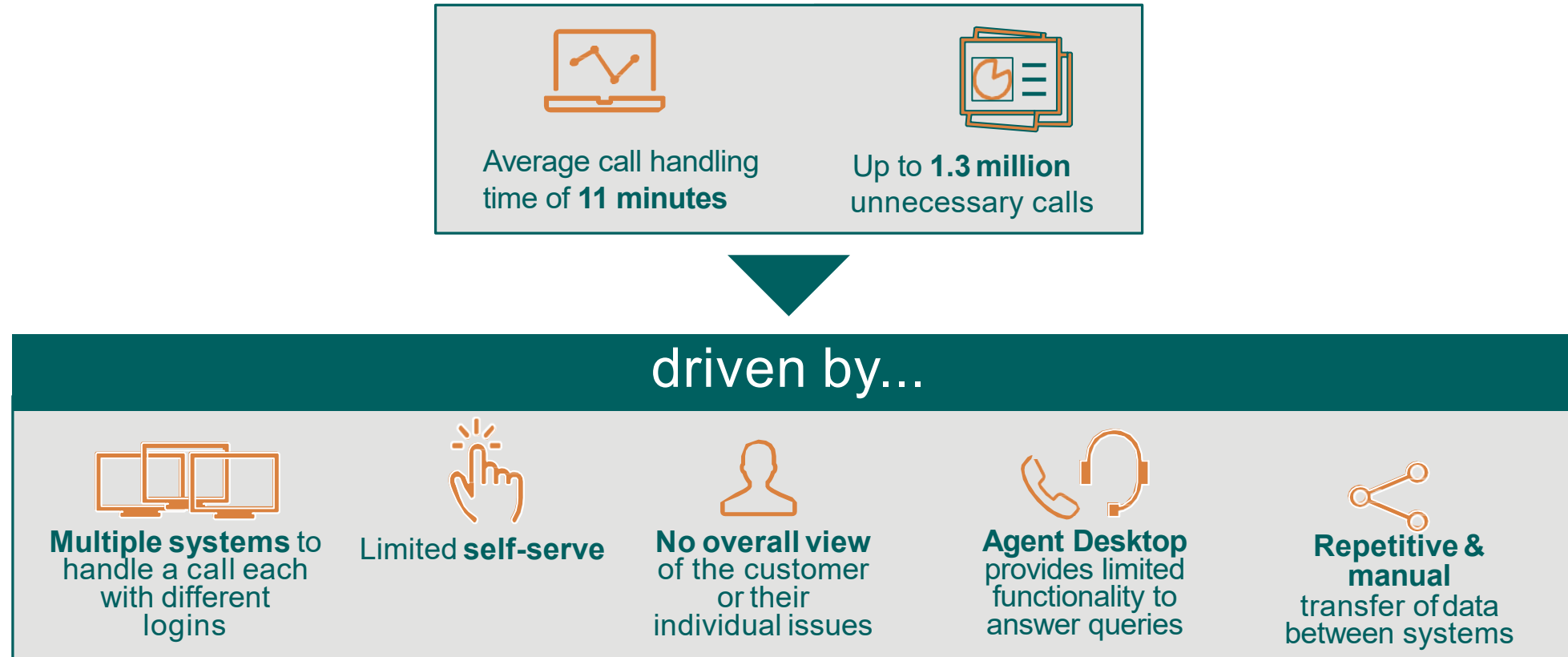
- A flexible service delivery role, removing barriers to efficiency
- Training & development models aligned to meet customer needs
- A consistent management model for productivity, quality and staff development
- The capability to adapt and improve



The Salesforce platform enabling and empowering us

- Provides a single view of the customer and their interactions
- Surfaces information from other systems enabling self service and empowering our teams
- Supports information and insight based on customer experience
- Enables us to adapt and enhance as needed in response to user and customer needs

Drivers for Change



- Currently our teams, processes and systems are task orientated and do not focus on customer outcomes
- This causes issues - we focus on what we need to do, not how we achieve the outcome the customer need
- We fragment a customer need into myriad tasks, managed separately and lacking a joined-up view

Our target customer experience

Customer Interactions



The best service is no service.

Customers would prefer to interact directly to apply for their student finance, and have their interaction dealt with fully automatically and as close to immediately as possible



Eliminate

Help our customers to help themselves.

Where a customer does want or need to interact with us, we will provide them with access to the information and services they need to allow them to do so easily and in their own time



Self Serve

When customers contact us with an issue, we address it quickly & efficiently

Where a customer needs to contact us they can do so through the channel of their choice, and their issue is resolved immediately or referred to someone who can. The customer is kept informed, and advised when the issue is resolved



Optimise

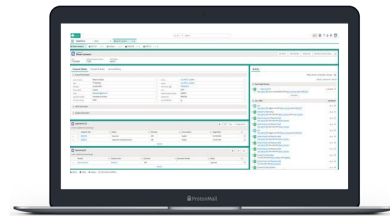
Where our customers need help to navigate the process, we assign someone to guide them. Where we identify that a customer is facing challenges with the process, we assign a case owner to guide them efficiently and supportively



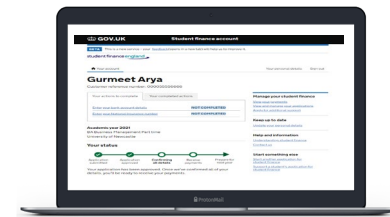
What CEM Provides

Previously, to help resolve a customer's query an agent accessed numerous systems, spreadsheets and tools. We now have an integrated view of all of the relevant information about the customer, their application and any issues they may have. This allows us to provide the answers our teams need to help customers, and surface those answers directly to customers through online self-service and pro-active notifications by email and text message

New Model

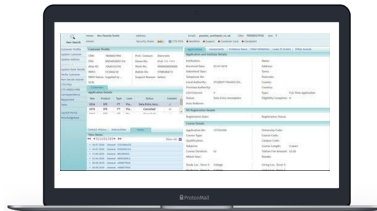


Salesforce Service Cloud for SLC staff

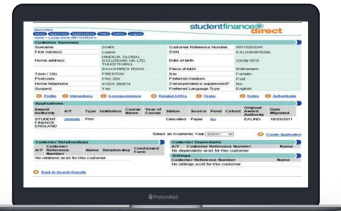


Salesforce Community for Customers

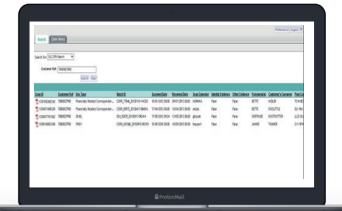
Previous Model



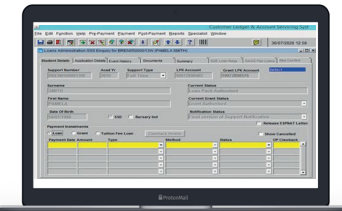
Agent Desktop



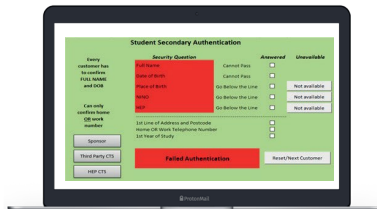
LA Portal



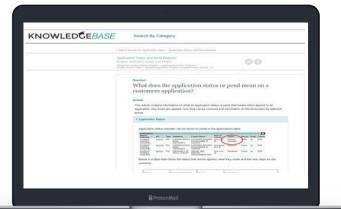
Taskspace



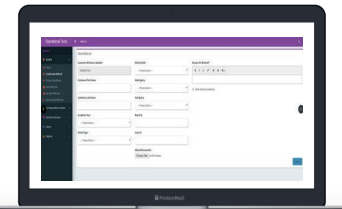
CLASS



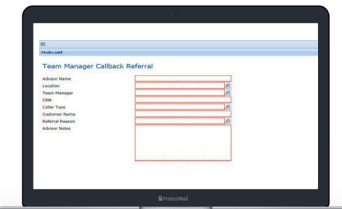
Excel ID&V Tool



Knowledge Base



SARA



OPX



Live service Capabilities overview

These are the key features available within in the self-serve platform, the below covers functionality that has been used by customers since the CEM project delivered

Self Serve:

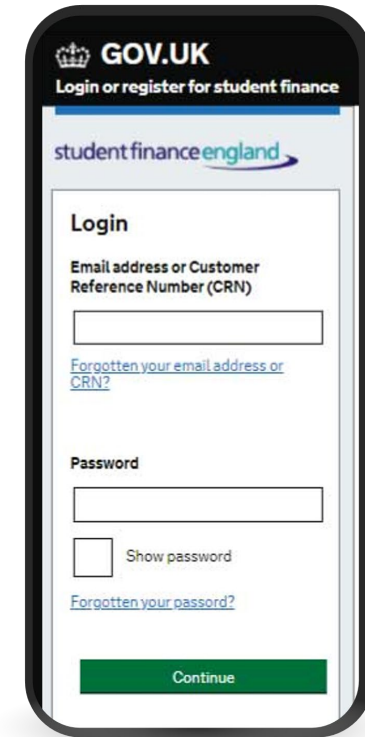
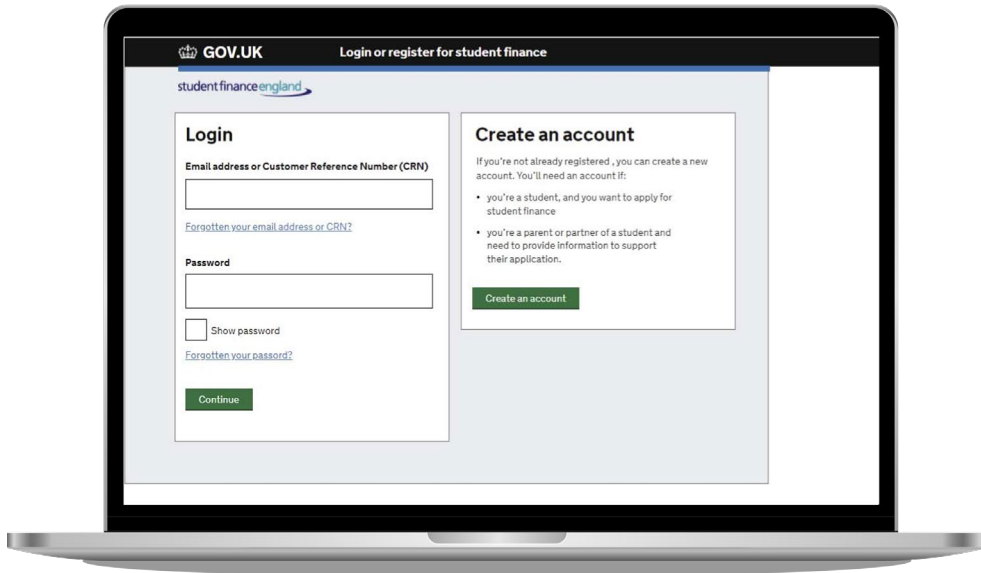
- ✓ View / Update Personal Info – This includes address and contact information
- ✓ Application Status Tracking – Clear view of the progress of the status
- ✓ Next Expected Update – A estimated date of when the customer can expect an update
- ✓ Next Actions – Clear view of what a user needs to do so that their application can continue to be processed
- ✓ View / Update and add new Bank Details
- ✓ Evidence Upload – Ability to upload files up to 16 MB (was originally 3MB)
- ✓ View Correspondence – Includes letter (PDF images), SMS and emails that have been generated
- ✓ View Payment Status and Schedules – Payment statues and correlating Information and Guidance

Interaction Channels:

- ✓ Chatbot – Chatbot flows which will help customers to get answers to their questions
- ✓ Live Chat – Ability to transfer to a skilled agent if the customer is unable to find the answer they need on the self-service platform
- ✓ Notifications – Several trigger notifications that keeps the customer up to date with the progress of their application
- ✓ Feedback Links – To rate the service

Further in the slide deck you will see enhancements and new features that have been introduced since August 2022 to improve the customer experience online and enable a better self-serve experience

Live service Capabilities overview



Enhancements to Self-serve

Below is a list of features/enhancements that have been delivered since August 2022

- Non UK Evidence Flows (SFE & SFW available in English and Welsh language)
- Ability to upload a copy of an original birth certificate
- New payment status and Information/Guidance (Maintenance and Tuition)
- Common Questions Hub – a new feature where customers can find answer to the most common questions being asked
- 2 new chatbot flows (Payment and Entitlement)
- General chatbot enhancements

Enhancements to Self-serve

Non UK Evidence Flows

A new screen has been introduced to ask the customer if they are a UK National, if the customer selects yes, then they will be guided through the screens below on how to provide proof of their identity. If the customer selects no to this question, then they will be guided down the new screens covered in the next slide

Are you a UK National?

- Yes
 No

[What is a UK national?](#)

You're a UK national if you have a UK passport or you're eligible to apply for one.

Continue

New Screen



How would you like to provide proof of your identity?

- Enter my valid UK passport details
 Upload a copy of my UK birth certificate or adoption certificate
 I cannot provide any of the above

You'll need to call us on **0300 100 0607** if you cannot give us the documents we've asked for.

Your application will take longer to action if you cannot give us this evidence.

Continue

Existing Screen



Upload a copy of my UK birth certificate or adoption certificate

[Change Evidence Type](#)

[I cannot upload my supporting evidence](#)

What we accept

If you do not already have a digital copy of your evidence, you can take a photograph or scan of it.

The image must be of the entire document and has to be readable by our staff.

We only accept BMP, JPEG, PDF, PNG or TIFF files up to 16 MB.

Please ensure you do not upload files that are password protected.

File name	Status
No files uploaded	

[Upload Files](#)

Continue

Existing Screen

Enhancements to Self-serve

Non UK Evidence Flows

As mentioned in the previous slide, if the customer selects no to the are you a UK national question, then they will be guided down the following new screens. The screens below ask the customer how would like to prove their identity; this can be done by uploading a copy of a EUSS share code or by providing original non-UK ID documents (covered on the next slide)

How would you like to prove your identity?

Upload a copy of your EU Settlement Scheme(EUSS) share code and your letter from the Home Office showing you've been granted settled or pre-settled status

▼ [What is an EU Settlement Scheme\(EUSS\) share code?](#)

An EUSS share code proves your immigration status and the right to study in the UK. You can create a EUSS share code at <https://www.gov.uk/view-prove-immigration-status>

Send my original non-UK ID documents

▼ **I cannot provide any of the above**

You'll need to call us on **0300 100 0607** if you cannot give us the documents we've asked for.
Your application will take longer to action if you cannot give us this evidence.

Continue

New Screen



Upload a copy of your EU Settlement Scheme(EUSS) share code and your letter from the Home Office showing you've been granted settled or pre-settled status

[Change Evidence Type](#)

▶ [I cannot upload my supporting evidence](#)

What we accept

If you do not already have a digital copy of your evidence, you can take a photograph or scan of it.

The image must be of the entire document and has to be readable by our staff.

We only accept BMP, JPEG, PDF, PNG or TIFF files up to 16 MB.
Please ensure you do not upload files that are password protected.

File name	Status
Mockhandwriting 0.1.pdf	RECEIVED

[Upload Files](#)

Continue

New Screen

Enhancements to Self-serve

Non UK Evidence Flows

If the customer selects Send my original non-UK ID documents then they will be presented with a new screen for sending us your original identity documents and supporting Information & Guidance on how to complete this

How would you like to prove your identity?

- Upload a copy of your EU Settlement Scheme(EUSS) share code and your letter from the Home Office showing you've been granted settled or pre-settled status

▼ [What is an EU Settlement Scheme\(EUSS\) share code?](#)

An EUSS share code proves your immigration status and the right to study in the UK. You can create a EUSS share code at <https://www.gov.uk/view-prove-immigration-status>

- Send my original non-UK ID documents

▼ I cannot provide any of the above

You'll need to call us on **0300 100 0607** if you cannot give us the documents we've asked for. Your application will take longer to action if you cannot give us this evidence.

Continue

New Screen

Send us your original identity documents

[Undo](#)
[Cont](#)

You need to send us original evidence to prove your identity. You must complete the following steps.

1. Gather your original evidence

You need to send 1 of the following:

- Original Passport
- National Identity Card
- Original Biometric Residence Permit Card (HOBRC)

▼ I cannot provide any of the above

You'll need to call us on **0300 100 0607** if you cannot give us the documents we've asked for. Your application will take longer to action if you cannot give us this evidence.

2. Send us your original evidence

You must include your name and customer reference number (CRN) with your evidence. We need this so we can identify your account.

You need to post your evidence to:

Student Finance England
PO Box 210
Darlington
DL1 9HJ

! You must send us your original documents by post. You cannot upload or send copies of your identity evidence.

What happens next

1. We'll email you when we receive your evidence.
2. We'll action your evidence and we'll email you if we need anything else from you.
3. We'll return your original evidence within 4 weeks.

Go to your account

New Screen



Enhancements to Self-serve

Ability to upload a copy of an original birth certificate

Student Finance customers can now choose to upload a copy of their UK birth certificate or adoption certificate instead of having to post in originals (Changes made for both SFE and SFW customers)

cyllid myfyrwyr cymru
student finance wales **Student finance account** Cymraeg

BETA This is a new service – your [feedback \(opens in a new tab\)](#) will help us to improve it.

🏠 Your account Your personal details Your inbox Sign out

< Back

How would you like to provide proof of your identity?

Enter my valid UK passport details

Upload a copy of my UK birth certificate or adoption certificate

I cannot provide any of the above

[Continue](#)



cyllid myfyrwyr cymru
student finance wales **Student finance account** Cymraeg

BETA This is a new service – your [feedback \(opens in a new tab\)](#) will help us to improve it.

🏠 Your account Your personal details Your inbox Sign out

< Back **Help and Information**
[Understanding student finance](#)
[Contact us](#)

Upload a copy of my UK birth certificate or adoption certificate

[Change evidence type](#)

▼ [I cannot upload my supporting evidence](#)

You can post your evidence to the following address:

Student Finance Wales
PO BOX 211
Llandudno Junction
LL30 9FU

Include your name and customer reference number (CRN) or date of birth, so we can identify you.

Your application will take longer to action if you post your evidence.

What we accept

If you do not already have a digital copy of your evidence, you can take a photograph or scan of it.

The image must be of the entire document and has to be readable by our staff.

We only accept BMP, JPEG, PDF, PNG or TIFF files up to 16 MB.

Please ensure you do not upload files that are password protected.

File name	Status
No files uploaded	

[Upload Files](#)

[Continue](#)

Enhancements to Self-serve

Payments (Maintenance)

New payment design which includes new mapping along with Information & Guidance for customers when viewing payment details

Status	IAG - English	IAG - Welsh
Paid	We've made a payment to your bank account	Rydym wedi gwneud taliad i'ch cyfrif banc
Payment in progress (new)	Your payment is on its way. It can take up to three working days for it to show in your bank account	Mae eich taliad ar y ffordd. Gall gymryd hyd at dri diwrnod gwaith iddo ymddangos yn eich cyfrif banc
Ready to be paid	We don't need anything else from you. Your payment will be made on the date shown	Nid oes arnom angen unrhyw beth arall gennych. Bydd eich taliad yn cael ei wneud ar y dyddiad a ddangosir
Scheduled (new)	We've scheduled your payments. Before we can pay you, your university or college will need to confirm to us that you've registered with them. They'll do this when you start your course	Rydym wedi trefnu eich taliadau. Cyn y gallwn eich talu, bydd angen i'ch prifysgol neu'ch coleg roi cadarnhad i ni eich bod wedi cofrestru gyda hi/gydag ef. Bydd yn gwneud hynny pan fyddwch yn dechrau eich cwrs
Blocked (new)	We cannot pay you. You should already know about this. If you do not, we have different ways to contact us	Ni allwn eich talu. Dylech fod yn gwybod am hynny'n barod. Os nad ydych, mae gennym amryw ffyrdd y gallwch gysylltu â ni
Awaiting confirmation	Your university or college need to confirm to us that you've registered on your course. They'll do this when you start your course. We'll pay you after we get this.	Mae angen i'ch prifysgol neu'ch coleg roi cadarnhad i ni eich bod wedi cofrestru ar eich cwrs. Bydd yn gwneud hynny pan fyddwch yn dechrau eich cwrs. Byddwn yn eich talu ar ôl i ni gael y cadarnhad hwnnw.
Checking details (new)	We need to check your National insurance number before we can pay you. Go to Your actions to complete to enter it	Mae angen i ni wirio eich rhif Yswiriant Gwladol cyn y gallwn eich talu. Ewch i'r adran Eich camau gweithredu sydd i'w cwblhau i'w nodi
Cancelled	We've cancelled your payment. You should already know about this. If you do not, we have different ways to contact us	Rydym wedi canslo eich taliad. Dylech fod yn gwybod am hynny'n barod. Os nad ydych, mae gennym amryw ffyrdd y gallwch gysylltu â ni
Failed	Your payment has been returned to us. Go to Your personal details to check your bank details	Mae eich taliad wedi'i ddychwelyd atom. Ewch i'r adran Eich manylion personol i wirio eich manylion banc
Suspended (new)	We will not make any more payments to you at this time. This is because you've suspended your course	Ni fyddwn yn gwneud rhagor o daliadau i chi ar hyn o bryd. Y rheswm am hynny yw eich bod wedi rhoi'r gorau dros dro i'ch cwrs
Withdrawn (new)	You've withdrawn from your course. This means we will not make any more payments to you	Rydych wedi tynnu'n ôl o'ch cwrs. Mae hynny'n golygu na fyddwn yn gwneud rhagor o daliadau i chi

Enhancements to Self-serve

Payments (Tuition)

New payment design which includes new mapping along with Information & Guidance for customers when viewing payment details

Payment Status	Current IAG	New IAG (Tuition Fees only)	Welsh Translation
Paid	We've made a payment to your bank account	We've made a payment to your university or college	Rydym wedi gweud taliad i'ch prifysgol neu goleg
Payment in progress	Your payment is on its way. It can take up to three working days for it to show in your bank account	The payment is on its way. It can take up to three working days for it to reach your university or college	Mae'r taliad ar ei ffordd. Gall gymryd hyd at dri diwrnod gwaith iddo gyrraedd eich prifysgol neu goleg
Awaiting confirmation	Your university or college need to confirm to us that you've registered on your course. They'll do this when you start your course. We'll pay you after we get this	Your university or college need to confirm to us that you're attending your course. They do this each term. We pay them after we get this.	Mae angen i'ch prifysgol neu goleg gadarnhau i ni eich bod yn mynychu eich cwrs. Maen nhw'n gwneud hyn bob tymor. Rydyn ni'n eu talu ar ôl i ni gael hyn.
Scheduled	We've scheduled your payments. Before we can pay you, your university or college will need to confirm to us that you've registered with them. They'll do this when you start your course	We've scheduled your payments. Before we can pay your university or college, they will need to confirm to us that you're attending. They'll do this when you start your course	Rydyn ni wedi trefnu amserlen eich taliadau. Cyn y gallwn dalu eich prifysgol neu goleg, bydd angen iddynt gadarnhau i ni eich bod yn mynychu. Byddant yn gwneud hyn pan fyddwch yn dechrau'ch cwrs
Blocked	We cannot pay you. You should already know about this. If you do not, we have different ways to contact us	We cannot pay your university or college. You should already know about this. If you do not, we have different ways to contact us	Ni allwn dalu eich prifysgol neu goleg. Dylech eisoes wybod am hyn. Os nad ydych, mae gennym ffyrdd gwahanol i chi gysylltu â ni
Checking details	We need to check your National insurance number before we can pay you. Go to Your actions to complete to enter it	We need to check your National insurance number before we can pay your university or college. Go to Your actions to complete to enter it	Rydym angen eich rhif Yswiriant Gwladol cyn y gallwn dalu eich prifysgol neu goleg. Ewch i Eich gweithredoedd i'w cwblhau i'w gofnodi

Enhancements to Self-serve

Payments

A view payments banner will show once the customer has been approved and the tracker is set to Confirming all details (for both SFE and SFW)

GOV.UK Student finance account

BETA This is a new service – your [feedback \(opens in a new tab\)](#) will help us to improve it.

🏠 Your account
Your personal details
Your inbox
Common questions
Sign out

Immfnmttestone Immfnmttestone

Customer reference number: 41980687853

You've completed all of your current actions

We'll contact you if we need anything else from you.

Your actions to complete

Action	Status
Enter your bank account details	COMPLETE
Provide your identity evidence	COMPLETE
Enter your National Insurance number	COMPLETE

Academic year 2023

Accounting and Finance Full time

University Of Leeds

Your status

✔
Application submitted

✔
Application approved

✔
Confirm all details

○
Receiving payments

➔
Prepare for next year

We'll send you an email or SMS each time we're due to make a payment to you or your university or college.

Approved - see how much you'll get

[View payments](#)

What happens next

1. We'll make payments to you at the start of each term - we'll pay these directly into your bank account.
2. We'll pay your tuition fee loan to your university or college.
3. You'll need to reapply for student finance each academic year.

Your payments

We'll make your payments within 3 working days of the expected payment date. [View your payments](#) for more information and a breakdown of your tuition fee loan.


Maintenance Loan

Expected date	Status	What the status means	Amount
11 September 2023	Awaiting Confirmation	Awaiting Confirmation - Your university or college need to confirm to us that you've registered on your course. They'll do this when you start your course. We'll pay you after we get this.	£1,534.83


Enhancements to Self-serve


Common Questions

Common questions hub is a place where customers can get answers to their question and vote on how helpful they found each article

 **GOV.UK**
Student finance account

BETA This is a new service – your [feedback \(opens in a new tab\)](#) will help us to improve it.



 Your account
Your personal details
Your inbox
Common questions
Sign out

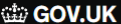
[Back](#)

Student finance common questions


Welcome to the common questions area. We will provide you with answers to the most common questions that undergraduate students, parents and partners are currently asking us. You can search for articles using keywords or phrases

All articles

	Audience	Published date
My entitlement is less than expected?	Top article	10/03/2023, 16:11
I've not received my payment, what can I do?	Top article	03/04/2023, 15:36
Need help providing documents or evidence?	Top article	10/03/2023, 16:12
How to view your payment schedule	Undergraduate students	19/12/2022, 09:51
I'm struggling with money, can I get extra help?	Undergraduate students	30/08/2022, 08:47

 **GOV.UK**
Student finance account

BETA This is a new service – your [feedback \(opens in a new tab\)](#) will help us to improve it.



Question:
What does 'Checking details' mean?

Answer:
We need to check your National Insurance number before we can pay you.

If you've not already provided your National Insurance number, go to [Your actions to complete](#) to enter it.

It can take up to 2 weeks for us to check your National Insurance number, once complete your payment status will move to [Scheduled](#) or [Awaiting confirmation](#).

Visit our article to learn [how to view your payment schedule](#).

Help us improve our service and [provide feedback on this article](#).

[Print Article](#)

Article Number - 000001443

Was this article helpful?

The following links open in a new tab.

[Cookies](#) [e-Privacy](#) [Terms and conditions](#) [Security](#) [Accessibility](#) [Feedback](#)

Built by the [Student Loans Company](#)

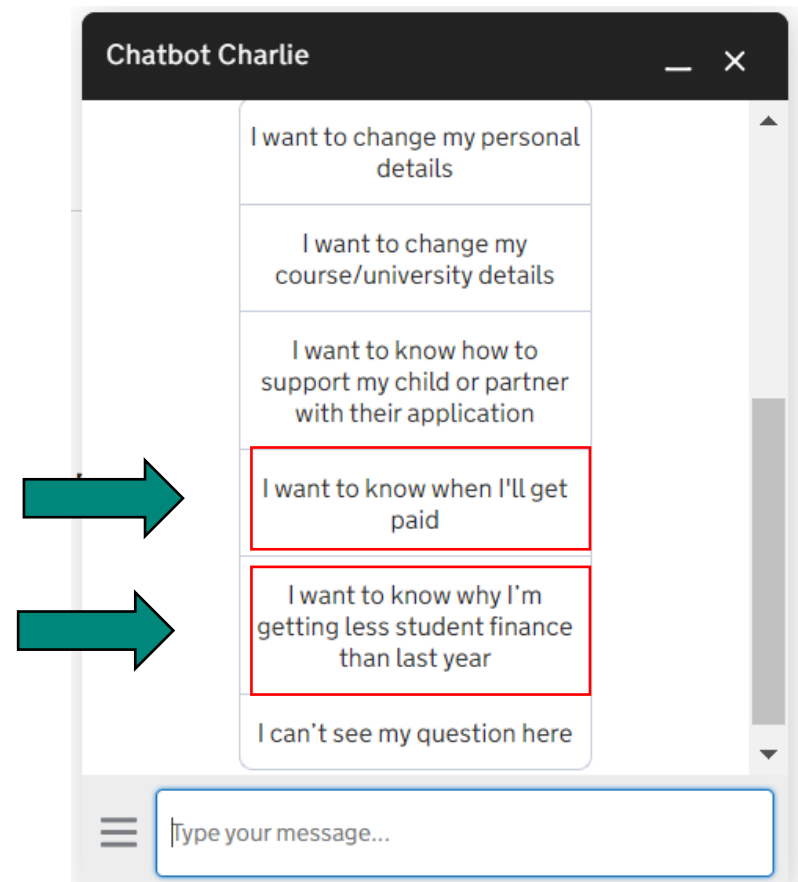

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Enhancements to Chatbot

New chatbot flows

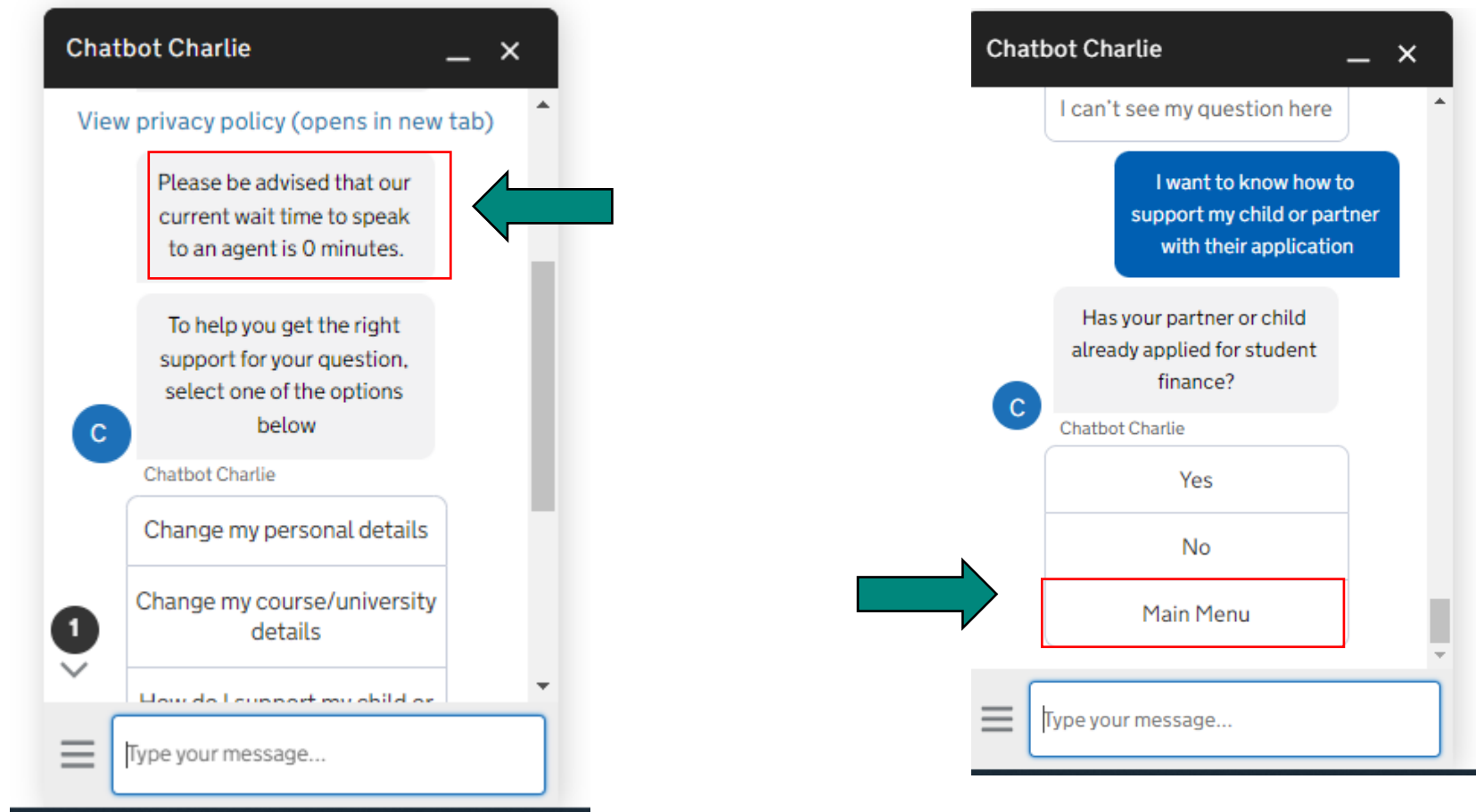
Based on feedback and most commonly asked questions there has two new chatbot flows have been created. The flows cover payments and entitlement information



Enhancements to Chatbot

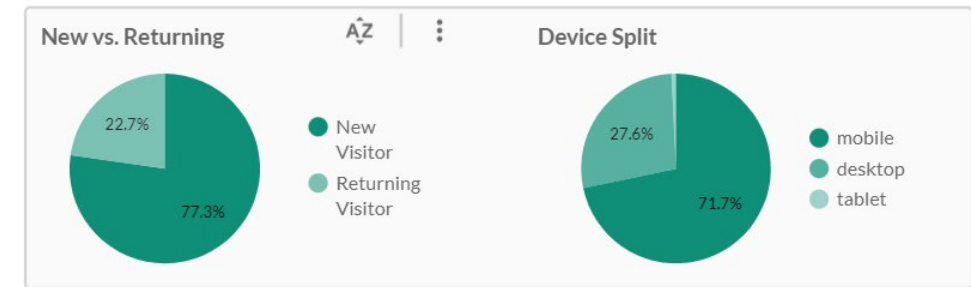
General chatbot enhancements

Customers using chatbot will now be advised the wait time to speak to a live chat agent and will also have the ability to navigate between chatbot flow easier with a back to Main Menu option



User Metrics (Google Analytics)

Between 31st March 2022 and April 05th 2023 we have had 8.6 million users hit the self-serve site – the following slide will show a further breakdown of page previews



User Metrics (Google Analytics)

Top Content (Pageviews)		
Page Title	Pageviews	% Δ
Your Account Application Status - Student Finance Account	15,489,429	-
Your Account Homepage - Student Finance Account	11,620,510	-
Your account homepage - student.finance.account.gov.uk	5,991,714	204.7% ↑
Your Student Finance Inbox - Student Finance Account	5,805,287	-
Your account - application status - student.finance.account.gov.uk	3,885,790	299.4% ↑
View Your Payments - Student Finance Account	3,500,688	-
View Your Personal Details - Student Finance Account	3,159,744	-
View Secure Message - Student Finance Account	3,010,045	-
Your student finance inbox - student.finance.account.gov.uk	1,653,979	139.6% ↑
View your personal details - student.finance.account.gov.uk	1,022,376	120.9% ↑

1 - 10 / 480 < >

Top Content (Pageviews)		
Page Title	Pageviews	% Δ
Contact Us - Student Finance Account	1,018,383	-
View and Manage Your Applications - Student Finance Account	930,139	-
Before You Upload Your Evidence - Student Finance Account	851,584	-
View secure message - student.finance.account.gov.uk	811,058	131.6% ↑
Upload Your Supporting Evidence - Student Finance Account	774,824	-
View your payments - student.finance.account.gov.uk	750,301	208.5% ↑
Upload Supporting Evidence - Student Finance Account	726,873	-
UK National Question - Student Finance Account	491,109	-
Common Questions	443,253	-
View and manage your applications - student.finance.account.gov.uk	385,441	627.1% ↑

11 - 20 / 480 < >

This page shows a breakdown of the most viewed pages across the self-serve site. Other than the homepage the key areas are, application status, payments and personal details

Top Content (Pageviews)		
Page Title	Pageviews	% Δ
Change Your Bank Details - Student Finance Account	380,613	-
Contact us - student.finance.account.gov.uk	340,376	287.1% ↑
Send Us Your Identity Evidence - Student Finance Account	331,374	-
Before you upload your evidence - student.finance.account.gov.uk	330,819	254.8% ↑
Upload Supporting Evidence	227,059	170.1% ↑
Understanding Student Finance - Student Finance Account	226,739	-
Send us your identity evidence - student.finance.account.gov.uk	224,584	356.3% ↑
Upload your supporting evidence - student.finance.account.gov.uk	204,608	228.8% ↑
Non-UK National ID Options - Student Finance Account	199,430	-
Change Your Address - Student Finance Account	166,211	-

21 - 30 / 480 < >

Customer Feedback Scores – Live chat

Live Chat

Customer Satisfaction Score
– 92.5%

Customer Effort – 90.6%

Query Resolved – 95.0%

Respondents – 10,406



For the period of 1st April 2022 to 31st March 2023 there were a total of 10,406 overall Respondents who completed the survey. The vast majority 95.6% left positive feedback and only 4.4% provided negative feedback / improvement suggestions

Positive Comments

It was helpfully and took just 10 minutes to solve my issue ...

The advisor was very supportive today and my query was managed in timely manner ...

Not a long wait, really helpful person on the end of the chat who was happy to deal with several issues ...

Super efficient and helpful. My problem was resolved straight away ...

Agent was friendly, professional and quickly confirmed the problem, with a satisfactory resolution ...

Very professional response and good knowledge of situations ...

Wait time was within 30 mins and the student finance officer was efficient ...

Very straightforward and easy chat. The advisor gave easy to follow advice ...

Negative Comments / Improvement Opportunities

I was hoping they could sort problem with linking my account instead of just saying to fill a 20 page form in ...

The advisor didn't seem to understand my worry of not being paid. Just a little more kinder reassurance would have been nice ...

Over 30 minutes for a phone call to be answered yesterday, very slow response on chat, very difficult to find the online current year income assessment form ...

I have been given different information three times and I'm now forced to quit studying as I can't pay for childcare...

Customer Feedback Scores – Chatbot

Chatbot

Customer Satisfaction Score

– 37.4%

Customer Effort – 45.4%

Query Resolved – 30.4%

Respondents – 15,955



For the period of 22nd May 2022 to 31st March 2023 there were a total of 15,956 overall Respondents who completed the survey after interacting with the chatbot

Positive Comments

Quicker than waiting for a call and figured out the issue immediately and managed to fix it promptly...

My question was resolved with high quality...

The responses were quick and the person I was talking with knew how to help me. Great help...

Straight to the point and even gave a timescale which I didn't even ask for...

Advisor was quick, precise and lovely to speak to! Query was answered and no complaints!

Very efficient at responding to messages and clear answers given

everything explained so clear and quick ,amazing service. thank you...

All accurate information and quick response...

Negative Comments / Improvement Opportunities

Speak to a chatbot to then find there's no one there to help you with your query...

No one is helpful in the slightest!! Keep being told the same thing yet no progress in my queries!

I hadn't even finished typing my question and the agent ended the chat...

Chat robot is transferring to student finance officer but is not happening, it just closing the chat....

Further Service Improvements

Vulnerable customers Project (October 2023)

- Provide a tailored service for our most vulnerable customers

EMA/WGLG Digital Form Project (June 2023)

- A new digital form for customers applying for Education Maintenance Allowance and Welsh Government Learning grants (reducing the need for a paper application)

Future Interaction Channels for SFW customers (May 2023)

- Chatbot – All 6 chatbot flows will be available for SFW customer in both English and Welsh language
- Live Chat – Chat – Ability to transfer to a skilled agent if the customer is unable to find the answer they need on the self-service platform (available in both English and Welsh language)

Agent Operation Enhancements (ongoing)

- Continue to improve internal facing system for agents when using salesforce, with the aim to provide a better service for our customers

Self-serve Enhancements & Channel Improvements (ongoing)

- Looking forwards the aim is to deliver new notifications, digital forms and improvements to allow a better self-serve capability

DSA Reform

- Continue to build on the DSA Service improvements private beta phase along with a reform of the DSA process.

Sponsors Redesign

- Enhanced journey for customers that are sponsoring applications

Continuing Development and Enhancement of CEM (ongoing)

- Continue to monitor and respond to customer feedback
- Analyse the extensive data now available on how customers interact with the service to identify further opportunities to improve the service
- Through training and development, build on the foundation of case management to further enhance customer service

Question time



Appendix

– following slides cover screenshots of the self-serve screens

Live Service Capabilities

Landing Page

Once logged in the user can select Undergraduate Students card will take them to an overview page of all applications. A sponsor will navigate to account page based on application their supporting. DSA, AdvLL & PG Student to Navigate to CP from the landing page. From here customers can also use the new HESC tile to download and digital upload an application form

GOV.UK Student finance account

BETA This is a new service - your [feedback](#) (opens in a new tab) will help us to improve it.

[student finance england](#)

[Your account](#) [Your personal details](#) [Your inbox](#) [Common Questions](#) [Sign out](#)

XXXRELEASETENXXX XXXCOEXXX
Customer reference number: 49288296581

Applications

Your recent application can take up to 6 hours to appear on this page. We'll email you when it's here.

Undergraduate student finance applications

You can view applications you've made for student finance from 2018 onwards. You can also manage your applications and view payment information.

Postgraduate student finance applications

You can view your applications you've made for student finance for a master's or doctoral course. You can also view payment information.

Disabled Students' Allowance application

Check the progress of your application for Disabled Students' Allowance.

Advanced Learner Loan application

You can view applications you've made for student finance for an Advanced Learner Loan course. You can also manage your applications and view payment information.

Higher Education Short Course Loans Application

You can apply for Tuition Fee Loans for up to 4 Higher Education Short Courses. Your university or college must be taking part in the trial of Higher Education Short Courses (HESC). You'll also need to show that you've been offered a place on a course.

You can [view applications for student finance you made before 2018](#).

You can [view or manage your repayments online](#) if you've already started to repay a student loan.

[Help and information](#)

GOV.UK Student finance account

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[Your account](#) [Your personal details](#) [Your inbox](#) [Sign out](#)

[Back](#)

Alex Smith

Customer reference number: 000011112222

Current year undergraduate applications

Academic year 2021/22
BA History Full time
University of Manchester

Application status
Processing application

You have actions to complete for this application

Previous years' undergraduate applications

Academic year 2020/21
BA History Full time
University of Manchester

Application status
Payments received

Academic year 2019/20
BA History Full time
University of Manchester

Application status
Payments received

Cancelled or withdrawn applications

Academic year 2021/22
BA Business Management and the Human Resource Full time
University of Leeds

Application status
Cancelled

[Help and information](#)
[Contact us](#)


Live Service Capabilities

Personal Details

After selecting Your Personal Details, a customer can update basic customer information as shown below

GOV.UK Student finance account

BETA This is a new service - [your feedback \(opens in a new tab\)](#) will help us to improve it.



🏠 Your account
Your personal details
Your inbox
Sign out

Your personal details

You must keep your personal details up to date. We use these to give you updates on your student finance.

Name	Alex Smith	Change
Email	alex.smith@mail.com	Change
Mobile telephone	07469700555	Change
Home telephone	Not provided	Change
Home address	1004 Nash House Old Oak Lane London NW10 6FF	Change
Contact address	1004 Nash House Old Oak Lane London NW10 6FF	Change
Braille/large font	Not required	Change
Password	*****	Change
Secret answer	*****	Change
Bank account details	Alex Smith ****03 ****5678	Change

Help and information

[Understanding student finance](#)

[Contact us](#)

Personal Details Page

User can view and update Personal Details, which will align to OCA changes once implemented for Address. There is Government Design principles style follows for the following - For an update made to one of the

- Update
- Check
- Confirmation

Bank Account Details – To meet security requirements a customer will be asked to confirm previous bank details before new detail can be added

Live Service Capabilities

Your account

GOV.UK Student finance account

BETA This is a new service - [your feedback \(opens in a new tab\)](#) will help us to improve it.

studentfinanceengland

Home Your account Your personal details Your inbox Sign out

Alex Smith

Customer reference number: 000011112222

You have actions to complete

Your progress could be delayed if we do not have everything we need.

Your actions to complete	Status
Enter your bank details	COMPLETED
Enter your National Insurance number	NOT COMPLETE
Provide your identity evidence	NOT COMPLETE
Upload your supporting evidence	NOT COMPLETE

Academic year 2020/2021

BA History Full time
University of Manchester

Your status

Application submitted Processing application Confirm all details Receive payments Prepare for next year

We're processing your application. We'll keep you up to date by email and here in your account.

What happens next

- We're checking your application - we'll email you if we need anything else from you.
- We'll email you updates about the progress of your application.
- We'll assess your application and tell you the outcome.

Next expected update: **05 May 2021 - 10 May 2021**

Manage your student finance

[View your payments](#)

[View and manage your applications](#)

[Upload supporting documents](#)

[Apply for extra help](#)

[Share your student finance information with someone you choose](#)

Help and information

[Understanding student finance](#)

[Contact us](#)

Start something else

[Start another application for student finance](#)

[Support a student's application for student finance](#)

Application Status Tracker

The application status tracker is based on LA Portal Status and CLASS Blocked Reasons and will provide the customer with a snapshot of their application status

Next Actions Component

The next action component will show the customer that one of the following actions needs to be complete before the application can move to the next stage of the process -

- Bank Details
- NINO Information
- Confirmation of Registration
- Sponsor Pends
- Evidence Validations (ID and Upload)

Estimated Review Date

OPX tasks provides estimated review date

Live Service Capabilities

Evidence Upload

Customers have the ability to upload evidence

GOV.UK Student finance account

BETA This is a new service - [your feedback \(opens in a new tab\)](#) will help us to improve it.

student finance england

Your account Your personal details Your inbox Sign out

Back

Check your progress

Which one of the following can you give to prove that your child/ children financially depend on you?

All pages of your most recent Tax Credit award notice or Universal Credit award notice showing all of your children

All pages of your most recent Child Benefit letter showing all of your children

I cannot provide any of the above

Continue

All of the links below open in a new tab.

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GOV.UK Student finance account

BETA This is a new service - [your feedback \(opens in a new tab\)](#) will help us to improve it.

student finance england

Your account Your personal details Your inbox Sign out

Check your progress

Which one of the following can you provide to prove your child/children's identity?

Birth certificate

Supporting evidence of your child/children's identity [Change](#)

birth certificate 1.jpeg [READY TO UPLOAD](#)

birth certificate 2.jpeg [READY TO UPLOAD](#)

Which one of the following can you give to prove that your child/ children financially depend on you?

Tax credit

Supporting evidence of your child/children's financial dependency on you [Change](#)

tax credit 1.jpeg [READY TO UPLOAD](#)

tax credit 2.jpeg [READY TO UPLOAD](#)

Upload and submit

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Uploading Evidence

Using LA Portal Validation, a customer will be required to upload specific evidence to support their application. Built in validations include Virus, Password Protected & file types, which has a current Limit **16MB**

Overview screen before full submission This screen allows the customer to see their upload status and give the ability to navigate back in the flow to do additional updates

Live Service Capabilities

Evidence Upload

Customers have the ability to upload evidence,

GOV.UK Student finance account

BETA This is a new service - [your feedback \(opens in a new tab\)](#) will help us to improve it.

student finance england

Your account Your personal details Your inbox Sign out

Supporting evidence uploaded

4 documents

- birth certificate 1.jpeg
- birth certificate 2.jpg
- tax credit 1.jpeg
- tax credit 2.jpeg

What happens next

We'll email you when we've received all your evidence. We'll also email you when we've actioned your evidence.

I've more files to upload

If you've more evidence to submit or you forgot to add a file you can return to [upload your supporting evidence](#).

Download a copy of this submission

You can download a PDF that shows the evidence you've uploaded.
[Download a copy of this submission as a PDF](#)

[Go to your account](#)

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Your account Your personal details Your inbox Sign out

Upload your supporting evidence

If we ask you to provide digital copies of evidence to support your student finance application, you can upload these here.

Before you upload

You can scan or photograph your evidence. The digital image you upload must be of the whole document and be readable by our staff.

These are the types of files we accept BMP, JPEG, PDF, PNG or TIFF. We can accept files of up to 3MB in size.

Do not upload files that are password protected.

What you need to provide evidence for

You'll choose what evidence you can give before you upload it. You can also choose to upload it later if you cannot do it now.

You need to prove the identity of each child (children) **RECEIVED**

Files uploaded
 birth cert page 1.jpg
 birth cert page 2.jpg

[Upload more evidence](#)

You need to prove how your child or children depend on you financially **NOT COMPLETE**

[Upload evidence](#)

▶ [What you can give as evidence](#)

You need to prove how you've financially supported yourself in the last 3 years. **ACCEPTED**

Files uploaded
 employer letter.jpg
 P80.jpg

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Confirmation Page

This screen will display files uploaded and Download PDF version of confirmation, customer will be navigated through a individual flows which displays acceptable evidence

Evidence Tracking

This will Link to main next action component on Your account and provide a updated status once evidence has been received at SLC along with updates status to complete once approved in LA Portal

Live Service Capabilities

Your Inbox

GOV.UK Student finance account

BETA This is a new service - [your feedback \(opens in a new tab\)](#) will help us to improve it.

student finance **england**

🏠 Your account Your personal details **Your inbox** Sign out

All messages

Secure messages

Emails

SMS text messages

Letters

Your student finance inbox

All messages

[What's happening with my birth cert?](#) **NEW**

Secure Message 22 October 2021

Your first payment has been made

SMS text message 4 October 2021

[Letter of entitlement](#)

Letter 26 August 2021

Student finance application - thank you for your application

Email 28 April 2021

[< Previous](#) [Next >](#) Showing 1 to 4 of 4 messages

Letters

Integration to Vault to display electronic versions PDF version existing correspondence (including NoE) (tactical change is currently in place which navigates customers back to Customer Portal until a security fix is implemented)

Emails/SMS

New notifications issued via SLC Notify. Metadata only (unable to view template) but provided record of event triggered notifications

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Live Service Capabilities

View payments

Your status



We'll send you an email or SMS each time we're due to make a payment to you or your university or college.

What happens next

1. We'll make payments to you at the start of each term - we'll pay these directly into your bank account.
2. We'll pay your tuition fee loan to your university or college.
3. You'll need to reapply for student finance each academic year.

Your payments

We'll make your payments within 3 working days of the expected payment date. [View your payments](#) for more information and a breakdown of any other loans or grants you have.

Maintenance loan

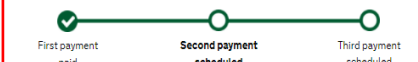
Expected date	Status	Amount
06 October 2021	Ready to be paid	£3,036.99
11 January 2022	Ready to be paid	£3,036.99
12 April 2022	Ready to be paid	£3,129.02

The screenshot shows the 'Student finance account' page on GOV.UK. It includes a 'BETA' notice, a navigation menu with 'Your account', 'Your personal details', 'Your inbox', and 'Sign out', and a breadcrumb trail for 'Student finance application'.

View your payments

Academic year 2021/2022

Maintenance Loan



We'll make payments within 3 working days of the expected payment date.

Expected date	Paid to	Status	Amount
06 October 2021	****5678	Paid	£3,036.99
11 January 2022	****5678	Ready to be paid	£3,036.99
12 April 2022	****5678	Ready to be paid	£3,129.02
Total			£9,203.00

Other academic years

[Academic year 2020/21](#)

[Academic year 2019/20](#)

Help and information

[Understanding student finance](#)

[Contact us](#)

Tuition Fee Loan



We'll make this payment directly to your university or college.

Expected date	Paid to	Status	Amount
21 October 2021	University of Newcastle	Paid	£1,541.25
03 February 2022	University of	Ready to be paid	£1,541.25

Your Account

A customer can view Scheduled payments – displayed on the overview on homepage. These are Linked to Blocked Reasons in CLASS – “confirming all details” and will display in the Next Actions section

Payments

Customers can view Tuition Fee Loan and Maintenance Fee Loans amounts as well as Supplementary Grants. There is a tracker which shows for 3 Instalments along with any Manual/Interim payments that may have been paid to the customer

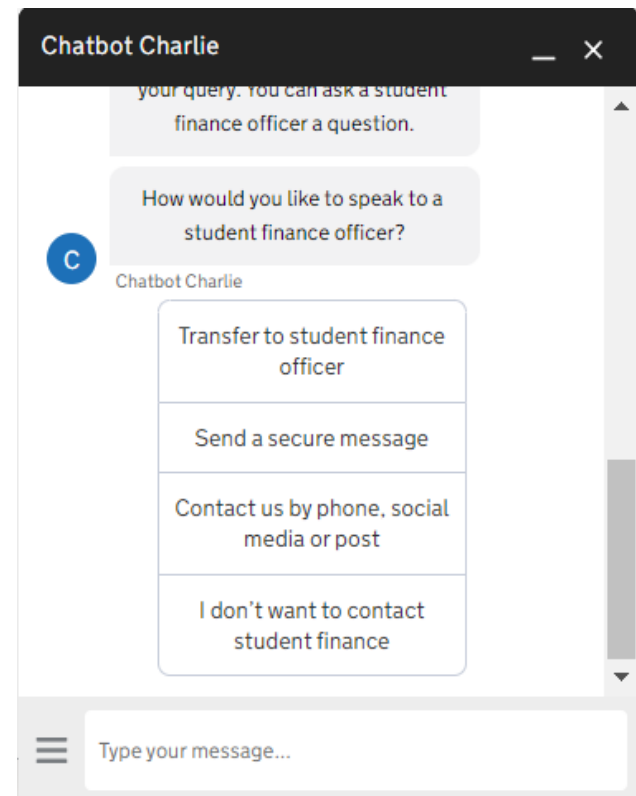
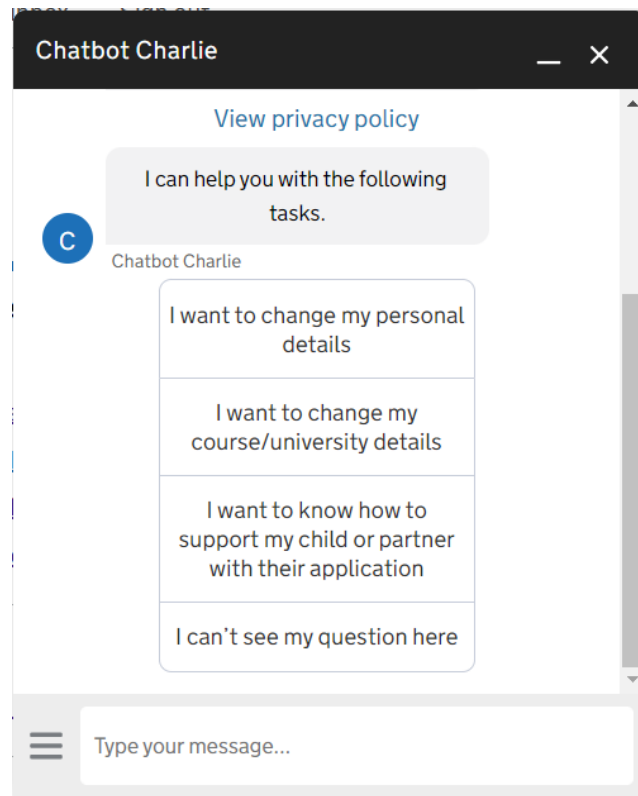
Historic Payments

A view of payments made in previous academic years

Live Service Capabilities

Chatbot

Users can now interact with chatbot Charlie, if the customer is unable to find the answer to their question they can be directed to a live agent. A customer can select from 4 different flows to help get the information they require; the customer also has the option to be transferred to a live agent. Below shows the flows Chatbot Charlie can help with



Live Service Capabilities

Chatbot – Live Chat

If the customer has selected the option to be transferred to a live agent, they will be connected to the next available agent who will receive a transcript of the interaction between the customer and Chatbot Charlie. The agent and customer can continue the conversation to identify and resolve the customers query. Below shows the conversation from both a customer and agent perspective

The image displays two side-by-side screenshots of a live chat interface. The left screenshot shows the customer's perspective, and the right screenshot shows the agent's perspective.

Customer Perspective (Left):

- Header: Jamie M
- Options: "Contact us by phone, social media or post" and "I don't want to contact student finance".
- Action: "Transfer to student finance officer" button.
- Chatbot Charlie (11:57): "We're now transferring you to a live chat service with a student finance officer."
- Chatbot Charlie (11:57): "Chat started with Jamie M"
- Jamie M (11:59:30): "Hi, how can I help you today?"
- Input field: "Type your message..."

Agent Perspective (Right):

- Header: Salesforce, Home, 00000162
- Chatbot Charlie (11:57:38): "Transfer to student finance officer"
- Chatbot Charlie (11:57:43): "We're now transferring you to a live chat service with a student finance officer."
- Chatbot Charlie (11:57:43): "Chatbot Charlie sent a transfer request"
- Jamie M (11:59:30): "Hi, how can I help you today?"
- Jamie M (12:00:56): "Could you provide an update on my application please?"
- Input field: "Type a message..."
- Buttons: "End Chat"

Live Service Capabilities

Sponsor Account

GOV.UK Student finance account

BETA This is a new service - your feedback (opens in a new tab) will help us to improve it.

studentfinanceengland

Your account Your personal details Your inbox Sign out

Sam Smith
Customer reference number: 00007778888

You've completed all of your current actions
We'll contact you if we need anything else from you.

Your actions to complete	Status
Provide your financial details	COMPLETED

Applications you're supporting
Academic year 2020/2021
Alex Smith

Your status

Information submitted Checking information Your part is complete

We're checking the financial information you provided. We'll email you and Alex Smith if we need anything else from you.

What happens next

- If we need anything else for Alex's application we'll email you.
- Alex will need to reapply for funding each year, which means you'll need to provide us with new financial information each year.

Has your household income gone down since the 2019/20 tax year?
You can [apply for a current year income assessment](#) and submit estimates for what you expect to earn in the 2021/22 tax year. If your household income has to have gone down by 15% or more since the 2019/20 tax year, the student you are sponsoring may be entitled to more support.

Next expected update 10 June 2021 - 15 June 2021

Update Personal Details

Once logged in a sponsor can update personal details

Sponsor Account Information

Like students anyone sponsoring an application will have a sponsor Tracker which linked to Supporting Application, customers can also see details which include Student Name and AY, the page also has dynamic guidance based on tracker

Next Actions

A sponsor could have outstanding actions which they need to complete so that an application can progress. These actions are mapped to sponsor pends within LA Portal. One of the actions could be to upload supporting evidence, this can now be uploaded using the upload supporting evidence link

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Customer Engagement Management HE Seminar

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