

# **THE ROLE OF THE FINANCIAL AID TEAM IN RECRUITMENT & RETENTION...**

**...WHEN THE INSTITUTION'S POCKETS ARE EMPTY**

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**Who I Am**

**My University**

# ARE WE HERE TO TALK ABOUT \$\$\$\$?

Limited Institutional Aid  
Restricted Institutional Aid

Gap Financing/Packaging  
Equity Packaging  
Self-Help Packaging



**....WHEN THE INSTITUTION'S POCKETS ARE EMPTY**

**Customer Service**

# TEAM TACTICS FOR SUCCESSFUL CUSTOMER SERVICE

## FOUR TEAM INITIATIVES

- ❖ Be the Experts!
- ❖ Have a Face!
- ❖ Communicate, Communicate, Communicate!
- ❖ Smart Processing!

**TEAM TACTICS FOR  
SUCCESSFUL CUSTOMER SERVICE**

**Be the Expert**

**TEAM TACTICS FOR  
SUCCESSFUL CUSTOMER SERVICE**

**Have a Face**

**TEAM TACTICS FOR  
SUCCESSFUL CUSTOMER SERVICE**

Communicate

Communicate

**Communicate**



**TEAM TACTICS FOR  
SUCCESSFUL CUSTOMER SERVICE**

**SMART  
PROCESSING**

# Questions & Group Sharing