

Scenario # 9: Customer wants a check for training today

Customer Willie Trainnow, comes into the office appearing a little rushed and frustrated. XYZ Academy told him to come to The WorkSource for a check for truck driving school.

We need someone to play the following parts:

Greeter

Financial Aid Specialist (FAS)

Mr. Willie Trainnow (WT)

Greeter to Willie Trainnow: Hi, welcome to The WorkSource! How can we help you today?

WT: I start training tomorrow at XYZ Academy and they told me The WorkSource would pay for my training.

Greeter: You should talk to one of our Financial Aid Specialists. Follow me and I will take you to Ms. Edwards.

The Greeter escorts WT to the next available FAS, Vicky Edwards, and introduces them.

FAS: What can I do for you today Mr. Trainnow?

WT: I'm enrolled in the CDL class that starts tomorrow at XYZ Academy and the lady at the school said to come here to get a voucher to pay for my class. Can you help me?

FAS: We often provide scholarships for truck driving school but approval takes more than a day.

WT: Well what am I supposed to do? My classes start tomorrow and they need payment today.

FAS: Let's look at some options you may have. There are CDL classes starting almost every week. Let me start by asking a few questions. Are you working now?

WT: No, I'm tired of receiving these food stamps, I need a job. I have a job offer. They are giving me 3 months to get my CDL. I went to XYZ because I know they offer the class, and it is quick.

FAS: Let me look at the training schedule for XYZ Academy. I think the CDL classes at the XYZ start twice each month. You may want to wait for the next class.

The WorkSource has several steps before we approve a scholarship. We start with a financial aid application. To qualify for a scholarship your income must not be above a certain amount. Sometimes we ask for documents to prove your income.

You must also talk to a Service Representative who will work with you on a short employment plan. Before we pay for school, we want to feel confident that you will be able to use the training to go to work. The Service Representative will ask about your driving record and other questions to be sure there is nothing that is likely to keep you from getting a license or a driving job.

The last step is approval from our financial office telling us that funds are available for training.

WT: Are you about to run out of funds?

FAS: No. I expect we will have funds for your training. We get regular updates that tell us funds are available now, but the final approval comes from our financial office.

WT: How long does all of it take?

FAS: One business day, two at the most, after we have all the information we need from you.

WT: Well let's get started RIGHT NOW!

FAS: Okay. Have you ever filled out The WorkSource work application?

WT: Yes. A long time ago but I already have a job offer.

FAS: We like to get an up to date work application in case the job offer doesn't come through after the training. It also gives the Service Representative information to help him with the Employment Plan I mentioned to you earlier. It doesn't take long. You can do it online in the resource room, by paper application, or I can do it for you now. Which would you like to do?

WT: You do it.

FAS: Okay, I am going to ask you some questions and type your answers into our database.

WT: Okay

(FAS updates Mr. Trainnow's WorkInTexas.com work application)

FAS: Can you fill out this application for Financial Aid now or would you like to bring it back?

WT: I can do it now.

(Customer fills out the Financial Aid application and addendum)

(FAS notes by looking at the customer's application that he lost his job months ago and is receiving food stamps. He is living on savings and help from a girl friend.)

FAS: It looks like you are probably eligible for a scholarship. You need to bring me some documents to attach to the application. I've checked the ones I need from you. Will you look and tell me if you have what we need.

WT: Yea, I think so.

FAS: Do you want to see the Service Representative today. I think Mr. Barrie Helpful can see you if you can wait for just a few minutes.

WT: Okay. Why did you say I needed to talk to someone else?

FAS: We just did as much as we can today on the financial aid application. That's the first step in getting your scholarship approved. My job is to help you find and qualify for the financial aid you need.

A Service Representative helps you with the next step – agreement on an employment plan. He will make sure there is no reason to believe you won't be able to complete the training and that it is likely you will be able to get a job as a driver after you finish. He'll also keep up with you after training, to help if you need anything else when you're ready to go to work.

WT: Okay. How long will it take to talk to him?

FAS: I'm not sure. I think he is available now and he'll let you know before you all start. Remember you have to bring me those documents before I can move forward with your financial aid application. Is there anything else I can help you with today?

WT: No. Thanks for your help. I'll get these documents back to you, and talk to Mr. Helpful.

(FAS calls Mr. Helpful to see when he can see Mr. Trainnow)

FAS: Here's my card if you have any questions, please call me. Mr. Helpful will be with you shortly. Good luck.

Note: *This situation does not necessarily require "no". We can provide information and suggest an option that satisfies the customer. We must remember to focus on listening to the customer and providing alternatives.*

Discussion Questions:

- 1. Was the FAS clear in telling the customer that we would not be able to pay for his training beginning tomorrow?**
 - The FAS clearly stated that it takes longer than a day for The WorkSource to approve a scholarship.
 - The FAS was able to provide alternative solutions to the customer. She remained focused on what she could do for the customer to satisfy the Mr. Trainnow's requests.

- 2. Did the FAS explain The WorkSource financial aid process?**
 - The FAS took the time to explain the process to the customer and restated to ensure that the customer understood what we would do, and what he would have to do, to get approval for a scholarship.

- 3. Do the steps in getting financial aid have to occur in the order they did in this scenario?**
 - No. If the customer had told the Greeter that he wanted us to help him go to school but was unsure what kind of education he wanted the Greeter would have suggested that he talk to the Service Representative first. Customers can complete the process of applying for financial aid in the order that best fits the situation.

Discussion Points:

- 1. Could the FAS have offered other resources?**
- 2. Is there ever an exception to the rule, when we can give a customer a voucher for training, the same day?**
- 3. What steps should the PSR take with the customer?**