

CLIENT RELATIONS REPRESENTATIVE SERIES

Code No.	Class Title	Occ. Area	Work Area	Prob. Period	Effective Date
4697	Client Relations Representative I	02	358	6 mo.	11/01/88
4698	Client Relations Representative II	02	358	6 mo.	11/01/88
4699	Client Relations Representative III	02	358	6 mo.	11/01/88
4700	Client Relations Representative IV	03	358	6 mo.	11/01/88
4701	Client Relations Representative V	03	358	6 mo.	11/01/88

Promotional Line: 100

Series Narrative

Employees in this series act as representatives of an organization that administers financial assistance programs for college students. They interface with the organization's clients (students, parents, high school counselors, college financial aid advisors, lenders, and prospective lenders) in order to maintain, promote, and monitor participation in student financial aid programs.

Client Relations Representatives typically--

--research and solve individual problems in response to inquiries

--conduct seminars and individual sessions to provide information and advice on procedures and issues relating to student financial assistance programs

--develop training and promotional materials

--identify financial aid trends

--develop recommendations to improve the programs, and

--review compliance of lenders and schools with program rules and regulations.

At the upper levels of the series, Client Relations Representatives--

--train subordinates

--manage the program, and

--study and develop new or revised program strategies.

DESCRIPTIONS OF LEVELS OF WORK

Level I: Client Relations Representative I

4697

Employees in this class are entry level representatives who receive training in student financial assistance program rules, regulations, and policies and provide basic informational services to clients (such as

CLIENT RELATIONS REPRESENTATIVE SERIES

2

providing routine information and answering routine questions) regarding student financial assistance programs. They work under direct supervision from higher level personnel.

A Client Relations Representative I typically--

1. responds to routine inquiries from clients in order to provide or clarify information on student financial assistance programs, policies, and procedures (such as completion and filing of forms and questions on eligibility requirements)
2. researches routine inquiries and solves problems relating to grant, scholarship, or loan information on individual cases
3. composes routine correspondence
4. assists with surveys and gathering data for statistical studies
5. prepares reports of contacts
6. performs related duties as assigned

Level II: Client Relations Representative II

4698

Employees at this level are journeymen representatives who provide standard informational services to clients and serve as direct representatives to lenders and school personnel regarding student financial assistance programs. They work under general supervision from higher level personnel.

A Client Relations Representative II typically--

1. responds to complex inquiries from clients in order to provide or clarify information on student financial assistance programs, policies, and procedures (such as application production schedules, lender merger procedures, or calculation of award/loan values)
2. researches complex inquiries relating to grant, scholarship, or loan information and solves problems on individual cases
3. prepares complex correspondence and training and promotional materials
4. assists higher level Client Relations Representatives in examining lender and school financial aid records to ensure compliance with program rules and regulations
5. performs on-site visits to lenders and schools to assist with implementation of program rules and regulations and with individual case problem solving
6. identifies problems and trends and suggests resolutions to higher levels
7. communicates with and informs clients on recent developments in student financial assistance programs
8. prepares and presents specific topics at training seminars for financial aid and student loan officers

CLIENT RELATIONS REPRESENTATIVE SERIES

3

9. performs related duties as assigned

Level III: Client Relations Representative III

4699

Employees at this level are senior representatives who provide training or special assistance to clients or review and analyze client activities or attitudes; they may also supervise subordinate employees. They work under general supervision from higher level personnel.

A Client Relations Representative III typically--

1. plans, prepares, and presents training sessions, seminars, and other functions for financial aid officers, loan officers, and high school counselors
2. communicates with clients by providing technical training and assistance on out-of-the-ordinary matters
3. conducts on-site examinations of lender and school financial aid records to ensure compliance with program rules and regulations
4. reports on trends and client feedback and recommends changes to higher levels
5. coordinates, develops, and executes research, studies, and surveys to determine product mix and position in current product mix and analyzes the results
6. develops promotional and informational materials for clients and internal staff
7. prepares reports on activities of assigned personnel and attitudes of clients; recommends program improvements to promote client participation
8. recommends selection of and trains and evaluates subordinates
9. delegates and supervises work assignments of subordinates
10. performs related duties as assigned

Level IV: Client Relations Representative IV

4700

Employees at this level coordinate and oversee the activities of representatives providing client services or serve as staff specialists providing technical training and promotion regarding student financial assistance programs. They work under direction from higher level personnel.

A Client Relations Representative IV typically--

1. designs and implements marketing and customer service strategies to promote and maintain participation in programs
2. utilizes the results of analyses and recommends changes to higher levels to re-design and re-position the product

CLIENT RELATIONS REPRESENTATIVE SERIES

4

3. coordinates the development, implementation, and execution of modifications to current strategies to increase the participation of existing clients
4. coordinates the development, implementation, and execution of marketing strategies to attract additional program participation
5. participates as presenter, trainer, and discussion leader in seminars and training sessions and evaluates results
6. conducts periodic evaluations of lending and educational institutions to assure compliance with applicable rules and regulations and to identify and report incidents of fraud and abuse
7. interviews, hires, trains, assigns, and reviews work and evaluates assigned staff
8. performs related duties as assigned

Level V: Client Relations Representative V

4701

Employees at this level plan, organize, and direct the activities of a staff engaged in the promotion, maintenance, and monitoring of student financial assistance programs administered by the organization. They work under administrative direction from higher level personnel.

A Client Relations Representative V typically--

1. establishes training, compliance, promotional, and informational programs for clients and prospective clients
2. analyzes client needs and recommends policy changes to administrators
3. directs the design and preparation of manuals and other technical documents for clients
4. plans, participates, and speaks at seminars, workshops, and training sessions regarding student financial assistance programs
5. directs research, analysis, and development of statistics and market trends
6. responds to program rule and regulation changes by implementing operations to comply with changes
7. plans, organizes, and controls department operations
8. performs related duties as assigned

MINIMUM ACCEPTABLE QUALIFICATIONS REQUIRED FOR ENTRY INTO

Level I: Client Relations Representative I

4697

CREDENTIALS TO BE VERIFIED BY PLACEMENT OFFICER

1. high school graduation or equivalent
2. (A) 18 months of responsible business experience in customer service, marketing, public relations, or other related business experience requiring public contact

or

(B) credit for 60 semester hours of college training, 24 of which were in business administration, communications, journalism, marketing, public relations, psychology, education, or other fields involving public/social relations (or an Associate's degree in such fields)

or

(C) any combination of the above computed on a proportional basis
3. valid Illinois driver's license

PERSONAL ATTRIBUTES NEEDED TO UNDERTAKE JOB

1. knowledge of public relations
2. ability to act independently

Level II: Client Relations Representative II

4698

CREDENTIALS TO BE VERIFIED BY PLACEMENT OFFICER

1. high school graduation or equivalent
2. (A) three years of responsible business experience in customer service, marketing, public relations, or other related business experience requiring public contact

or

(B) credit for 120 semester hours of college training, 48 of which were in business administration, communications, journalism, marketing, public relations, psychology, education, or other fields involving public/social relations (or a Bachelor's degree in such fields)

or

CLIENT RELATIONS REPRESENTATIVE SERIES

6

(C) any combination of the above computed on a proportional basis

3. valid Illinois driver's license

PERSONAL ATTRIBUTES NEEDED TO UNDERTAKE JOB

1. knowledge of public relations
2. ability to develop informational material
3. ability to present informational material
4. ability to exercise independent judgment

Level III: Client Relations Representative III

4699

CREDENTIALS TO BE VERIFIED BY PLACEMENT OFFICER

1. possession of credential requirements listed for the Client Relations Representative II
2. one year of work experience comparable to that gained as a Client Relations Representative II

PERSONAL ATTRIBUTES NEEDED TO UNDERTAKE JOB

1. knowledge of public relations
2. knowledge of student financial aid programs
3. knowledge of federal and state rules and regulations affecting student financial aid programs
4. familiarity with market research activities
5. skill in developing informational material
6. skill in speaking publicly
7. skill in exercising independent judgment

Level IV: Client Relations Representative IV

4700

CREDENTIALS TO BE VERIFIED BY PLACEMENT OFFICER

1. possession of credential requirements listed for the Client Relations Representative III
2. one year of work experience comparable to that gained as a Client Relations Representative III

CLIENT RELATIONS REPRESENTATIVE SERIES

7

PERSONAL ATTRIBUTES NEEDED TO UNDERTAKE JOB

1. broad knowledge of student financial aid programs
2. broad knowledge of federal and state rules and regulations affecting student financial aid programs
3. knowledge of public relations
4. knowledge of market research activities
5. familiarity with electronic data processing capabilities
6. skill in speaking publicly
7. skill in exercising independent judgment
8. ability to coordinate and oversee activities of subordinates

Level V: Client Relations Representative V

4701

CREDENTIALS TO BE VERIFIED BY PLACEMENT OFFICER

1. possession of credential requirements listed for the Client Relations Representative IV
2. one year of work experience comparable to that gained as Client Relations Representative IV

PERSONAL ATTRIBUTES NEEDED TO UNDERTAKE JOB

1. extensive knowledge of student financial aid programs
2. extensive knowledge of federal and state rules and regulations affecting student financial aid programs
3. broad knowledge of market research activities
4. knowledge of public relations

CLIENT RELATIONS REPRESENTATIVE SERIES

8

5. knowledge of electronic data processing capabilities
6. skill in developing informational material
7. skill in exercising independent judgment
8. ability to plan, organize, and control department functions

Client Relations Representative I	(NEW)
Client Relations Representative II	(NEW)
Client Relations Representative III	(NEW)
Client Relations Representative IV	(NEW)
Client Relations Representative V	(NEW)