

# Job Description

**For Internal HR Use:**

**FLSA Status:**

**Grade:**

**Company:** Brazos Higher Education Service Corp. Inc.  
**Job Title:** Customer Relations & Sales Associate  
**Effective Date:** 2/1/2025  
**Department:** Customer Relations  
**Location:** Waco  
**Reports to (Title):** VP, Student Lending Operations

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## **I. Job Summary**

The purpose of this position is to provide exceptional customer support while driving business growth through partner outreach, lead generation, and sales initiatives. This role balances inbound service with outbound sales efforts, manages relationships with clients and partners, and requires strong communication skills, CRM proficiency, and occasional travel.

**II. Essential Duties and Responsibilities** include the following. To perform this job successfully, an individual must be able to perform each essential duty satisfactorily. Other minor duties may be assigned.

- Provide exceptional customer support by responding to incoming calls, texts, emails, and online chats from customers, originators, servicers, and schools.
- Accurately maintain and update customer accounts, recording interactions and ensuring timely follow-up as needed.
- Manage assigned projects, including application pull-through efforts, default outreach, loan documentation, and audits to support business objectives.
- Develop and maintain strong relationships with school partners, prospective referral sources, and existing business partners both virtually and in person.
- Conduct outreach activities such as cold calling, prospecting, and lead development to expand referral networks and generate new business opportunities.
- Travel for business development activities, including overnight trips as needed, to meet with partners, attend events, and represent the company professionally.
- Review and verify external-facing materials on partner websites to ensure accuracy, consistency, and alignment with Brazos' branding and marketing standards.
- Prepare and update sales materials (Word, PDF) to support marketing campaigns and business development efforts effectively.
- Draft, manage, and execute professional sales outreach communications via email (Outlook, Zoho) to support lead generation and client engagement strategies.
- Utilize CRM systems to track interactions with partners and prospects, ensuring accurate data management and efficient follow-up processes.

## **III. Supervisory Responsibilities**

Not normally required to supervise others.

## **IV. Qualifications**

The requirements listed below are representative of the qualifications necessary to perform the job.

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## A. Education

Required: High school diploma or G.E.D.

Field of study:

Preferred: Specialized/technical training past high school or some college

Field of study: Business, Marketing, or Communications

## B. Experience

Required: 1 year but less than 3 years of previous experience

Preferred: 3 years but less than 5 years of previous experience

## C. Certificates, Licenses, Registrations or Other Requirements

- None

## D. Other Knowledge, Skills or Abilities Required

- Excellent customer service skills with a professional phone demeanor.
- Strong interpersonal communication skills with active listening and relationship-building abilities.
- Service-oriented with the ability to resolve customer issues and complaints effectively.
- Detail-oriented with strong organizational, documentation, and time management skills.
- Proficient in Microsoft Office (Excel, Word, Outlook), Adobe/PDF, and CRM systems (e.g., Zoho, Salesforce).
- Ability to learn and navigate internal systems such as ELM, Scholarnet, and other industry-specific platforms.
- Ability to acquire and maintain knowledge of student loan industry concepts, terms, and processes.
- Strong analytical and problem-solving skills to address customer inquiries and partner needs.
- Sales-focused mindset with the ability to identify business opportunities and foster long-term relationships.
- Ability to manage multiple priorities, work independently, and meet deadlines in a fast-paced environment.

## V. Work Environment

Listed below are key points regarding environmental demands and work environment of the job. *Reasonable accommodations may be made* to enable individuals with disabilities to perform the essential functions of the job.

- Required to sit prolonged periods at a desk and on the phone **Most of the day**
- Required to use motor coordination with finger dexterity (such as keyboarding, machine operation, etc.) **Most of the day**

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- Required to exert physical effort in handling objects **Rarely**
- Required to be exposed to physical occupational risks (such as cuts, burns, exposure to toxic chemicals, etc) **Rarely**
- Required to be exposed to physical environment which involves dirt, odors, noise, weather extremes or similar elements **Rarely**
- Normal setting for this job is an **Office Setting or Remote Work.**