



Job Description

(For Positions in CAW Local 555, Unit 1)

Job descriptions do not include every duty that an individual in a position performs. They are intended to be representative and characteristic of the duties required and the level of work performed. Depending upon the size of the department or unit and its functional activities, incumbents who fall into this category may perform all of the duties listed below or, in the case of large departments or units, may be assigned to designated specialized functions.

JD #:	JD00722	Pay Grade:	5
JD Title:	Customer Relations Representative and Financial Assistant	JD FTE Hours:	35
Job Family:	Administrative		

General Description

Responsible for receiving and assessing all incoming requests for services and preparing production instructions for areas of operation. Interacts with clients to determine their expectations regarding a variety of technical specifications. Requires a thorough understanding of print production processes and the ability to work through complex jobs requiring a number of components to complete the task. Also responsible for applying a thorough knowledge and understanding of accounting policies and procedures to process financial transactions. Records, classifies and summarizes accounting data according to established procedures and provides guidance and training to staff on proper accounting procedures and the use of financial systems.

Representative Duties & Responsibilities

- Assess all incoming requests for services and prepare production instructions for offset and digital print, bindery, shipping, outsourcing and sub-contracting activities.
- Translate project specifications into production instructions.
- Prepare production instructions and ensure that all applicable production processes have been identified and articulated clearly and concisely.
- Meet with and identify customer expectations regarding technical specifications such as paper, ink colours, quantity selection, and printing process finishing options.
- Review all client files and samples submitted and prepare customer quotations and estimates taking into consideration all relevant specifications and production processes required to produce the printed materials.
- Price projects on various presses or printing technologies offered by the division in an effort to maximize efficiencies and revenues.
- Greet visitors, answer or redirect general inquiries in person, by telephone and via email and responds independently to inquiries that are specific in nature and require a thorough knowledge of established policies and procedures.
- Liaise with area supervisors, production assistants, designers, customers, vendors and other production staff in the department.
- Liaise with commercial printers and finishers to ensure the best fit for each project outsourced.
- Participate in client meetings.
- Promote web-to-print solutions to clients.
- Provide explanations of printing technologies with an understanding of cost effective printing formats.
- Ensure that the department billing system reflects the current costs of all materials and supplies.
- Monitor budgets and reconcile accounts. Complete financial forms such as travel expense reports, electronic cheque requisitions, purchase orders and journal entries.
- Prepare and disseminate invoices for services rendered.
- Maintain current pricing on all materials and supplies and ensure that the department billing system reflects the current costs.
- Apply standard mathematical skills such as calculations, formulas, and equations to perform routine calculations.
- Source contracted services, identify vendors, and obtain quotes.
- Receive and record all associated work requests and applicable billings.
- Review paper samples received from distributors and identify the appropriate ink colour according to the established colour guide.

Representative Duties & Responsibilities

- Write a variety of documents such as reports, correspondence, and minutes.
- Create, update, and maintain information in a variety of spreadsheets.
- Open and distribute incoming mail and faxes.
- Prepare outgoing mail, faxes, and courier shipments.
- Maintain filing systems, both electronic and hard copy.
- Maintains confidentiality of information.
- Update and maintain knowledge of copyright law.

Supervision

- Ensure adherence to quality standards and procedures for short-term staff.
- Provide orientation and show procedures to others.

Qualifications

- 2 year Community College diploma in Office Administration or related field of study.
- Requires 3 years of relevant experience.

Effort

Physical Effort:

- A typical work day consists of greater than 3.5 hours of low physical effort for activities such as:
 - Intermittent periods of keyboarding to word process documents, enter data into databases and enter financial information into spreadsheets.
- Elements of moderate physical effort are not a regular feature of this job.
- Elements of high physical effort are not a regular feature of this job.

Mental Effort:

- A typical work day consists of up to 2 hours of routine mental effort for activities such as:
 - Collecting routine information and files to word process routine documents such as correspondence and forms, and inputting data into spreadsheets and databases.
- A typical work day consists of greater than 3.5 hours of moderate mental effort for activities such as:
 - Assessing all incoming requests for services and preparing production instructions for offset and digital print, bindery, shipping, outsourcing and sub-contracting activities.
 - Translating project specifications into production instructions.
 - Preparing production instructions and ensuring that all applicable production processes have been identified and articulated clearly and concisely.
 - Meeting with and identifying customer expectations regarding technical specifications such as paper, ink colours, quantity selection, and printing process finishing options.
 - Reviewing all client files and samples submitted and prepare customer quotations and estimates taking into consideration all relevant specifications and production processes required to produce the printed materials.
 - Pricing projects on various presses or printing technologies offered by the division in an effort to maximize efficiencies and revenues.
- Elements of high mental effort are not a regular feature of this job.

Working Conditions

Physical Environment:

- There are no adverse physical environment conditions inherent to the job.

Psychological Environment:

- Occasionally interacts with individuals who may be rude or upset.
- Frequently handles competing requests from multiple sources.

Health & Safety:

- Risk to the incumbent is no higher than for the general population.

Job Description Rating Sheet

(For Positions in CAW Local 555, Unit 1)

JD #:	JD00722	Pay Grade:	5
JD Title:	Customer Relations Representative and Financial Assistant	Total Points:	367
Job Family:	Administrative		

Factor	Subfactor	Level Rating	Points
Skill	1. Applied Reasoning and Analytical Skills	3.5	71
	2. Breadth of Knowledge	2.0	13
	3. Adaptation to Change/Updating of Learning	2.0	12
	4. Interpersonal Skill	2.0	23
	5. Education and Experience	D3	60
	6. Dexterity and Coordination	2.0	12
Effort	7. Physical Effort	1.0	3
	8. Mental Effort	3.0	55
Responsibility	9. Planning and Coordination	2.0	28
	10. Responsibility for Others	2.0	33
	11. Accountability for Decisions Actions Affecting People, Assets, and Information	2.0	39
Working Conditions	12. Physical Environment	1.0	3
	13. Psychological Environment	2.0	10
	14. Health and Safety	1.0	5