

Creating an Agent Manual

Prepared for: EducationAgentReviews.com

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CREATING AN AGENT MANUAL

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Why Create An Agent Manual?

- To address frequently asked questions
- To establish criteria for policy decisions and relationship management
- To put in writing how any potential agent-university conflicts will be handled
- To have a accessible resource for agents who want to refresh their training
- To demonstrate a commitment to agent training and partnership building
- To evaluate your own challenges with agent managements and to put in writing the solutions you have created for these challenges

Many institutions choose to make their agent manual focused on [processes and internal policies](#), or in other words, focusing on improving the agent-university partnership. This only works when actual training about the university (what majors it offers, the acceptance rate, etc.) has already taken place, and that general information about the university is readily available to the agents.

The below template follows the above premise. For instance, in addition to receiving the agent manual, agents could also be sent the PowerPoint that your university presents to interested students in order to understand the pertinent information you wish to present to students. Or you may include an appendix at the end of your manual that references other PDFs, PowerPoints, websites, or online portals where agents can find out information about the university from a student's perspective.

Let's Keep the Conversation Going

This guide is provided as a free resource on the website, EducationAgentReviews.com. We would love for a second (and a third and a fourth) version to be released after gathering additional great ideas from our higher education colleagues. You can email us at info@educationagentreviews.com or use the message boards on the website to discuss and add your own best practices.

What to Write About?

The following topics will help you self-study and to think about what you would like to include in your agent manual. We have presented them in a fashion that made sense to us, but you may feel free to delete, rearrange, or add whatever information you find has helped your agents previously.

Introduction/welcome

Consider writing a short letter of introduction/welcome to set the tone for your agent manual. Have it signed by the highest level possible, such as the Director of your International Office or whoever else is instrumental in brokering your agent partnerships. Establish the goals and focus of a collegial relationship.

Table of contents

Always make sure your manual is easily searchable. You can even create a digital copy and hyperlink your headings in Word or PDF format to jump to the associate sections.

Office of International Programs (or similar office)

- *What is your office hierarchy/ org structure?*
- *Who should the agents contact for what?*
- *Who is the main point of contact for agent inquiries?*
- *Who should invoices be sent to?*
- *Are there generic email addresses or specific people to contact?*

Important websites/resources

- *What is your main admissions website for international students?*
- *Do you have an agent only website?*
- *Where can students/agents find information on different majors?*
- *Where can they find a directory online?*
- *Where would they find the printed English proficiency requirements online?*
- *Where would they find the online or PDF application?*

Brochures, photos, marketing

- *What is your policy on marketing on your behalf?*
- *Do you allow use of your logo with/without prior permission?*
- *What are your Public Affairs' office rules about altering logo colors, formats, etc?*
- *Do agents need to tell you if they've created social media on your behalf (Weibo, RenRen, translated websites etc)?*
- *Do agents need to tell you if they produce printed translation brochures?*
- *Do you have a Dropbox or similar website where they can download campus photos?*
- *Who do they contact if they need images about your university?*
- *Who do they contact if they would like to receive printed materials for distribution in their home countries?*

Undergraduate applications: explanations and notes

Checklist of a completed application

- *What do agents need to send in order for an application to be evaluated? What is considered an “official” document for evaluation purposes?*

Busy times/seasons

- *What is your general turnaround time for evaluating an application? When should agents be a little patient in expecting a quick response? (Example: NOT the day before your International Orientation!)*

Accuracy and authenticity

- *State your position on what actions you hold agents’ responsible for.*

Email addresses of students

- *Do you have a policy on agents’ using students’ email addresses? Can agents put their own email address in your application portal or does it need to be the students’? Does your application portal have limits on 1 user account per email (an email account cannot have multiple users/application)? What is your policy on how students will receive information – will you email students directly or will you be sending correspondence either directly to the agent or at least CC’ing them?*

Standardized testing scores

- *Is your institution test-optional?*
- *Which exams are test-optional?*
- *Do you accept copies of score reports or screenshots of user accounts?*
- *Do scores need to be sent digitally?*
- *Are the scores used for scholarship purposes?*
- *Do only certain majors require SAT/ACT scores and if so, what are the minimum scores required?*

Timeline/evaluation of a file [undergraduate]

- *What exactly happens after a student/agent clicks “submit” on the online application?*
- *Who is working in the office to match documents to applications?*
- *How long does the file-making process take?*
- *What types of emails are sent for confirmations/questions?*
- *Are students/agents notified when an application is considered complete?*
- *How long does an admissions decision take to reach?*
- *Are I-20 financial documents required before or after completion of the application?*
- *After acceptance, how are the documents mailed/sent?*
- *How are students notified of their acceptance?*
- *Does the immigration advisor (DSO/PDSO) reach out requesting financial documents?*
- *Are there additional after-acceptance steps – for instance, assigning student volunteers to chat with the accepted student?*
- *Are students responsible for paying for shipping costs of the I-20?*

- *If emailed copies of transcripts were used, at point should original documents be sent by the postal mail?*

Undergraduate conditional admissions / general ESL policies

- *What are your English language proficiency guidelines/policies?*
- *Is TOEFL/IETLS/other exams required for admission purposes?*
- *If not, are students tested for English upon arrival to campus?*
- *What are the baseline scores you use to evaluate students' beginning academic classes?*
- *What are common protestations you receive from students about your English policies and what are responses you would like agents to share with students?*
- **It is better to be extremely explicit and straightforward in this section rather than have students tell you later that their agent did not fully understand your English policies.**

Exemptions to ESL policies

- *Are students exempted from ESL exams if they have taken the SAT or gone to an American school?*
- *If students received baseline scores in TOEFL/IELTS are they exempt from further testing on your campus?*
- *What are your official policies on students who do not need to show proof of English proficiency?*
- *Is there a list of countries on your website that do not need to show any proof of English proficiency?*

Graduate conditional admission

Not all universities have such policies but if you do have policies of graduate "conditional admission," make sure to include them here with very specific guidelines or refer them to your appendices / agent website.

Plagiarism during the application process

- *What is your policy on plagiarized personal statements?*
- *Who is held responsible – the agent or the student?*
- *Are students permitted to write their personal statements in their home languages and then get them translated?*
- *Do you require any statement from the student/agent, "I state this is my own original work"?*

Graduate application cycle and processes

- *Are graduate admissions decisions made out of the international office?*
- *If no, explain at what point the international office becomes involved. Example: "After acceptance, a copy of the graduate admissions letter is sent to the international office for immigration processing. We will then contact you to finish the I-20 process."*
- *Where can agents get more information about the graduate programs?*

- *Is there one person that can act as a liaison for all graduate questions?*
- *What should the agency be aware of for special circumstances for graduate applications? (Example: “We don’t always know that the graduate school received an application for your agency. Therefore, please be patient and simply let us know if we accidentally contacted the student instead of you,” or “Please send us a list every quarter of graduate students so we can mark them in our records as belonging to your agency.”)*
- *What is the timeline like for graduate applications? Should agents expect slower decisions than for undergraduate files?*
- *How can you strengthen your communication with the graduate school to let them know agents are now recruiting on their behalf (if the international office manages agents)?*

Agent communication and keys to success

Set out your mission for good communication. Explain whether you will be sending out monthly newsletters, for instance, and your expectations for reading these. Some universities prefer to place a short questionnaire here asking the agents to respond to the following questions:

- **AGENT SURVEY**
 - *Will applications be sent from your agency or from the student?*
 - *Will applications be generally sent as a complete package?*
 - *How will you inform us that you helped/referred a student?*
 - *If we have questions about an application, should we email you, the student, or both?*
 - *If we have questions about mailing an I-20, should we email you, the student, or both?*
 - *Will you be sending us inquiries or applications from one specific email address/contact, or are there several agent counselors that will be contacting us? Is one agent assigned per student or do several different agents help the same student from your company?*
 - *After a student is accepted, do you continue to be in touch with the student? Will you be helping the student with their next steps (immigration, deposits, housing, pre-departure orientation, etc)? Should we send you announcements about these items?*

Transfer student policies

- *Do you have special policies for international transfer students?*
- *Are they exempt from any testing or standardized test scores?*
- *Do you require an evaluation such as WES or ECE? Who is waived from this requirement?*
- *Are transfer students from agents treated differently from transfer students without agents?*
- *What are the minimum university GPA requirements?*
- *Do you seek to recruit more transfer students?*
- *Should transfer students expect a large majority of their credits to be transferred in?*
- *What are the transfer admission policies and/or scholarship policies?*

After acceptance: student enrollment, deposits, housing

If your international office continues to play a role in international student recruitment after admission, make this clear.

- *Explain the NEXT STEPS after admission – are there deposit deadlines?*
- *Do students receive pertinent information by email or postal service?*

- *What role do you expect the agent to play in relaying this information to the student?*
- *What are the graduate deposit requirements vs. undergraduate deposit requirements?*
- *When do you stop accepting new/last-minute applications?*
- *Who does the I-20 go to – the agent’s office or the student?*
- *What are your housing requirements (example: all freshmen must live on campus) and how does the student submit housing contracts?*
- *Do you have an international orientation and are students expected to attend?*
- *What important information will be mailed in acceptance packets that agents really need highlight for the students?*
- *Do you offer additional opportunities for communication such as closed Facebook groups for accepted students, Skype or Google hangouts, or pre-orientation videos?*
- *How much responsibility do you expect the agent to take on to prepare the student for arrival?*

Thank you

Close your agent manual with positive encouragement and a reiteration of your standards and excitement to work together.

Appendices

You may want to consider the following additions:

- *PowerPoints of your recruiters’ standard admission presentations*
- *Dropbox or other online sharing sites for downloadable photos and logos*
- *Digital copies of brochures*
- *Digital copies of student hand outs such as “Next Steps After Acceptance”*

You Did It!

Congratulations on finishing your first agent manual! Be sure to change it into a PDF (to prevent edits) before sending to your agents. Make it a best practice to email it to every new agent either right after training or in preparation for training – some universities also create training PowerPoints that go over the salient points of the manual. The point of the manual is to create a **TRANSPARENT** partnership where you explain clearly how you can help the agent best.

Some universities prefer to wait a year or so after signing their first agents before writing their manual; many of the best manuals are created after realizing you have encountered the same situation many times and you wish to put in writing what the correct policies are. In other words, depending on the nationality and culture of your agents, it’s only after a few months of working with agents that you will truly know what their most common questions and concerns are, and you can adapt your agent manual accordingly.

We also encourage you to revisit your agent manual every year or two to self-evaluate if your own policies have changed or if new challenges have been made. But, if you make any major changes, do the agents a favor by highlighting in a summary email what those changes actually are, in addition to resending out the updated PDF.

We hope this guide has been useful and we would love to see additional examples of agent manuals and helpful resources from you, our university colleagues! [Remember you can post your ideas in a password-protected forum on \[www.educationagentreviews.com\]\(http://www.educationagentreviews.com\)!](#)

~END~