



Job Description:

Client Care Leader

Reporting to: Client Care Manager

Responsible for: No direct reports

Special Requirements: This role supports a blended working approach with expectation of three days in the office each week.

Main Purpose of the Role

To provide legal advisers with the administrative support they need to allow seamless legal services to clients and help them maximise the amount of time they are able to spend on client work.

To act as workflow manager for their team's Client Care services including delegating and supervising the completion of document production, file management and copying/scanning work.

Main Responsibilities

The Client Care Leader is responsible for the executive function of daily support services for their immediate team. They will be involved in all aspects of the management and execution of their team's day to day workload by providing exceptional and proactive administrative support, through:

Leading the provision of all Client Care functions for their team, proactively identifying and prioritising work to meet deadlines, making informed decisions on the workloads and delegating appropriately to central support to maintain an even and timely workflow/service.

Generated through the new opportunity system, manage new enquiries, from potential clients, working alongside the solicitors to manage open opportunities. Establish understanding of client matters and confidently handle client enquiry calls, questions, queries effectively. Taking detailed notes and ensuring any relevant information is communicated to the legal advisers, when appropriate.

Taking an active interest in and obtain a thorough understanding of all aspects of client requirements. This might be via several different tasks, for example, undertaking file opening and sending initial client letters, completing regulatory and other forms as appropriate, compiling pleadings files in line with court rules, court bundles using Zylpha. Making follow up appointments for clients, attending meetings when required and monitoring or acting on client e-mails and post in senior colleague's absence.

Checking and amending letters and other documents produced by the Document Production team and compiling urgent and confidential correspondence and emails on behalf of the advisers.

Drafting, or amending and typing of letters, emails and other correspondence and updating internal case management system with contact, matter party information and any specific matter details, when required in order to maintain an accurate and complete client record. Assisting with photocopying, scanning and both electronic and paper filing during peaks in work volumes.

Accountable for managing diaries and handling of travel and meeting arrangements for senior colleagues and processing expenses claims if required.

Supporting the team in marketing activities including preparation of presentations and assistance with hosting of events/meetings when required.

Research client information and other matters as directed by the team. For example, producing mail shots, carrying out research into business opportunities as directed by the adviser and potentially making follow up client service satisfaction calls.

In the absence of senior colleagues, proactively manage emails, telephone calls and other correspondence, dealing with requests, queries, or enquiries; acting as point of contact; and ensuring relevant matters are dealt with or escalated as appropriate using judgment.

Requesting cheques, bank transfers and paying in money received, as appropriate. Assisting advisers with monthly billing, liaising with accounts on billing and credit control to produce standard financial/time reports.

Implementing and maintaining administrative procedures, regularly reviewing effectiveness and efficiency, and managing any ongoing ad hoc projects.

Responsible for working with other Client Care Leaders and the Litigation Client Care Manager ensuring a wider understanding of other discipline areas to ensure consistency of approach and appropriate cover arrangements are in place to support teams across their location. Escalating to Head of Client Services when solutions cannot be found.

Providing feedback and working with the Head of Client Services to identify any additional training needs for the Client Care Coordinators, where relevant. Providing feedback and input to the Client Care Manager at appraisal time and giving ongoing feedback and direction to Client Care Coordinators and Central Services Team Leaders.

Complying with all Tees policy, system, and house style requirements.

Undertake tasks and any other reasonable duties from time to time allocated to the role, maintaining all work areas in a tidy and orderly manner.

Person Specification

You have a responsibility to ensure your skill set remains up to date and you are familiar with the firm's departments, key personnel, clients, internal systems and procedures. This will ensure that you are able to carry out your role effectively and, where appropriate, discuss any training requirements with your manager.

Person Specification	Essential/ Desirable	Definition
Communication	Essential	Confident, clear and articulate communication skills both orally and in writing. Well presented, appropriate to a professional business environment. Pleasant telephone manner, speaks clearly and fluently.
Organisational skills	Essential	Ability to work in a planned and organised way, but has the ability to multitask and manage a variety of requests at one time. Manages time effectively. Monitors and maintains quality and productivity. Methodical, accurate and consistent even when under workload and/or time pressures. Ability to supervise and direct available staff resource.
Teamwork	Essential	Adapts and fits in well, able to work independently and within a team Finds things to do to help others when capacity allows Able to share knowledge with peers and coach other staff
Working with a wide range of different audiences	Essential	Ability to build effective relationships with managers, staff and clients Act in an open and approachable manner An awareness for the need for confidentiality
Technical skills	Essential Desirable	Computer, web literate and competent ICT skills. Experience using Microsoft office Experience with audio/digital dictation systems
Customer focus	Essential	Professional, polite, enthusiastic and welcoming approach A willingness to assist colleagues and clients achieve successful outcomes
Deciding and taking action	Essential	Has a proactive approach and will take responsibility for tasks and issues. Capable of taking initiative and finding solutions to problems and implementing systems for better smoother ways of working Awareness of level of responsibility and when and how to escalate issues appropriately