

JOB DESCRIPTION – CUSTOMER RELATIONSHIP MANAGER (PRIVATE CLIENT)

Reports to:

Head of Department

Role:

- To be the first point of contact for all new clients for the department
- To provide administrative assistance to the team
- To uphold exceptional standards of quality and client care

Key Activities & Responsibilities:

Client Management & Care

- To provide quotes and information about departmental services via telephone, email and face to face contact with potential new and returning clients
- To make and accurately diarise client appointments including making room/online meeting bookings
- To cross-sell other services within the firm, wherever possible
- To follow-up on new client enquiries and maintain contact with potential new clients

Departmental Administration

- To maintain records and data regarding new client enquiries
- To assist the Marketing Manager in future planning through providing information regarding sources of business and client demand
- To open new client matters on the case management system, Partner4Windows, and carry out new client checks e.g. conflict checks
- To assist fee earners in the department in casework administration including completion of online application forms and uploading supporting documents on behalf of clients

Compliance

- To follow all policies and procedures contained within the Office Manual
- To act in accordance with the regulations of the Solicitors Regulation Authority, and all other relevant bodies
- To provide assistance to fee-earners in ensuring files meet relevant standards and comply with regulations

Teamwork

- Work as a team player with all staff
- To assist and work appropriately and considerately with fee earners and support staff
- To attend and participate in any meetings of the department or the firm when required

Competence & Development

- Maintain a good knowledge and understanding of office equipment and IT systems with a proactive approach to the introduction of new systems

- Maintain knowledge and skills in relevant practice area(s)

The duties and responsibilities in this job description are not exhaustive and are subject to change in accordance with the needs of the firm.