davidgray
solicitors

JOB DESCRIPTION – HEAD OF PRIVATE CLIENT

Reports to:

Managing Partner

Role:

- To lead the department and co-ordinate the team's activities and the achievement of its business objectives
- To manage a varied caseload of wills, Court of Protection and probate and estate administration work
- To uphold exceptional standards of quality and client care
- To continually develop expertise and specialist skills in your practice area and pass on knowledge to your team through training and supervision

Key Activities & Responsibilities:

People Management & Leadership

- To lead and motivate a team of fee earners and support staff
- To ensure all staff in the team receive suitable training, regular supervision and support
- To conduct department meetings and attend and participate in any meetings of the firm when required
- To support and implement policies and procedures working constructively with the management team and staff
- To assist in recruitment for the department when required

Client Care & File Management

- To advise, assist and represent clients, maintaining an exceptionally high standard of client care at all times
- To balance the demands of your clients/caseload and non-casework responsibilities, ensuring you meet any deadlines set
- To adhere to and ensure the department adheres to all file and case management policies and procedures
- To maintain and update departmental file management procedures, standard forms and precedents
- To carry out and take responsibility for more complex or high value work
- To ensure the department maintains a high level of client satisfaction
- To maintain and co-ordinate access to online portals/software including Arken, Estate Search, Exizent

Financial

- To meet annual billing and performance targets (which will be calculated in consultation with you)
- To accurately record all time, chargeable and non-chargeable

- To ensure that the billing of files is carried out efficiently and at the earliest opportunity
- To demonstrate a good understanding of what is required for the department and the firm to achieve financial targets/success
- To manage and set department budgets and financial/billing targets liaising with the accounts team to interrogate and analyse data

Competence & Development

- To maintain knowledge and skills in relevant practice area(s) keeping up to date with relevant legislation and case law
- To ensure continuing competence through identifying and addressing any learning needs
- To participate in and engage with supervision in respect of your caseload
- To maintain a good knowledge and understanding of IT systems used by the firm with a proactive and supportive approach to the introduction of new systems
- To contribute to the improvement of operating systems and processes including
- To achieve and maintain any relevant accreditations, Law Society panel membership and other appropriate membership

Business Development/Marketing

- To take an active and enthusiastic role in business development and marketing for the department including attending meetings, identifying and facilitating internal cross selling opportunities, maintaining and growing a network of external contacts and referrers
- To contribute to marketing planning and help set and achieve firm marketing/business development objectives and targets
- To assist the Marketing Manager/IT Manager/Practice Manager in the maintenance and development of the firm's website for marketing purposes
- To co-ordinate the business/development marketing activities of your department/team and empower the team to engage in marketing activities
- To liaise with Accounts/IT/the Marketing Manager in data collation and analysis for marketing purposes e.g. referral sources

Compliance

- To act in accordance with the proper professional standards and regulations of the Solicitors Regulation Authority, and all other relevant bodies including the Legal Aid Agency
- To immediately advise the Partners of any investigation or disciplinary action by the SRA or LeO or any restrictions on your Practising Certificate.
- To identify and report any risks to the COLP, COFA or Money Laundering Reporting Officer where necessary
- To assess risk for the department and ensure compliance with customer due diligence requirements under the Money Laundering Regulations and any other relevant regulations or legislation

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