

JOB DESCRIPTION

Position Title: Legal Intake Specialist

Job Code:

FLSA Status: Non - Exempt

POSITION PURPOSE

The Intake Specialist receives and qualifies new and prospective clients for the Firm. This person will be responsible for managing the processes of onboarding new clients and evaluating incoming streams of claims and potential clients both on the phone and in-person as needed. The legal intake specialist works with the attorneys to schedule meetings, coordinate screening surveys and collects all necessary paperwork, and will work with the marketing team to provide support on generating new business client leads. This person may also be required to assist with monitoring phones at the office as needed.

RESPONSIBILITIES AND TASKS

- Evaluates prospective client inquiries and phone calls, analyzing their case fit in order to ensure the client feels heard and in order to gain a strong understanding of the client’s needs.
- Sets appointments for potential clients that meet the Firm’s criteria and to ensure the attorneys schedules are organized and the case loads are manageable.
- Supervises new client onboarding and existing client files through data entry and paperwork collection. This ensures the case files are managed efficiently.
- Partners with the marketing team on new and existing sales tactics and relationship development with other law firms in the surrounding areas to bring in new case volumes/loads.
- Performs occasional clerical or administrative tasks as needed, including but not limited to transcription, research, spreadsheet management and ensuring the operational efficiencies of written and verbal communications.

COMPETENCIES

Accountability	Taking ownership for responsibilities and commitments, and their outcomes.
Business Acumen	Understanding the context, needs, and key factors associated with achieving business goals and objectives.
Change Agility	Effectively anticipating, preparing for, facilitating, leading, and supporting sustainable positive change.
Collaboration	Contributing and capitalizing on the talents of diverse stakeholders to achieve common goals while respecting individual needs.
Communication	Conveying, understanding, acknowledging and incorporating information, news, ideas and feelings, using a variety of methods.
Leadership	Engaging relevant parties, building a compelling vision of desired outcomes, generating energy and enthusiasm, and empowering others to take action by removing obstacles and building accountability.
Personal Growth & Development	Devoting time and energy to expand knowledge, skills, and abilities; and seeking new experiences or career opportunities.
Quality & Customer Satisfaction	Committing oneself to maintain a high standard of excellence while also meeting or exceeding customer expectations.
Talent Management	Attracting, engaging, retaining, and developing high-performing individuals and teams to meet current and future business needs.
Job/Technical Proficiency	Demonstrating the appropriate breadth and depth of knowledge and skill specific to one’s profession, function or job discipline.

POSITION REQUIREMENTS

License or Certification:

- N/A.

Minimum Qualifications:

- High school diploma is required.
- Bachelor’s degree is preferred or relevant work experience.
- Previous experience working a law firm is a plus.
- Engaging and outstanding communication skills and a strong sense of empathy is required.

- Proficiency in Word, Excel and Outlook and familiarity with other systems typically used in a legal environment, such as document and file management applications.

Machines, Equipment Used:

- General office equipment such as computer/laptop, telephone, copy/fax machine, calculator, scanner, etc.
- Microsoft Office software, to include Outlook, Word, and Excel.

Physical Requirements:

- Visual acuity, speech recognition, speech clarity.
- Ability to lift, lower, push, pull, and retrieve objects weighing a minimum of 15 pounds. Reasonable assistance may be requested when lifting, pushing, and/or pulling exceeds these minimum requirements.

Skills and Abilities:

- Oral communication, written communication, fluency in English, active listening.
- Information ordering, deductive reasoning, social perceptiveness, time management, critical thinking.
- Ability to coordinate, analyze, observe, make decisions, and meet deadlines in a detail-oriented manner.
- Ability to work independently without continuous supervision.

Environmental Conditions:

- Indoor, temperature controlled, smoke-free environment.
- Handicapped accessible.
- May work under stressful circumstances at times.

Proficiency or Productivity Standards:

- Has regular, reliable, and predictable attendance and punctuality.
- Adheres to dress code including wearing ID badge.
- Adheres to Standards of Business Conduct.
- May be required to work weekdays and/or weekends, evenings and/or night shifts if needed to meet deadlines.
- May be required to work on religious and/or legal holidays on scheduled days/shifts.
- May be required to perform other duties as assigned by supervisor.
- This position will support cultural diversity by promoting and maintaining an inclusive work environment and culture that is respectful and accepting of diversity.

All job descriptions approvals and performance evaluations are conducted electronically. Under extenuating circumstances, paper templates can be requested from Human Resources or a member of leadership within the firm.