

**Client Engagement Assistant  
JOB DESCRIPTION**

Smith Partnership is a leading law firm in the East Midlands and Staffordshire. A forward thinking and progressive firm employing around 200 staff throughout 5 offices.

|                      |                                                |
|----------------------|------------------------------------------------|
| <b>Job Title:</b>    | Client Engagement Assistant                    |
| <b>Department:</b>   | Private Client                                 |
| <b>Hours:</b>        | Full time – 35 hours, 9am-5pm Monday to Friday |
| <b>Location:</b>     | Derby                                          |
| <b>Reporting to:</b> | Head of Private Client                         |

**Main Purpose:**

The main purpose of the role is to take and make calls to communicate with clients effectively and ensure they receive a positive service. The postholder responsibilities include being clear, competent, and efficient in providing guidance in relation to new appointments, the services offered by the department and to fact find using our own triage system pre client service engagement.

**Job Content – Main Duties, Tasks, and Responsibilities:**

**The main day-to-day duties are:**

- Assessing financial and family circumstances over the telephone with clients.
- Explaining the nature of our Private Client Services and how they are helpful.
- Effectively organising and allocating appointments for the Private Client Department.
- To generate business opportunities and win more client instructions for the firm.
- You will be able to build relationships and communicate with all the Private Client team members to ensure a smooth service.
- Evolve and operate client engagement systems, conduct fact finding, associated workflows and case management systems when booking service appointments.
- To report on key performance indicators to line management and collaborate your role with the commercial outcomes of the department for team success.
- To uphold exceptional standards of quality, client care and communication.
- Be empathetic and adaptable to a range of clientele and conversations.
- To follow all policies and procedures contained within the Staff Handbook.

- Ensure compliance with firm policies, regulatory requirements including SRA standards.

**GENERAL**

- To promote the image of the firm at all times as a professional, effective and efficient provider of legal services.
- To perform any task or duty under the reasonable direction of senior staff within the firm.

**STAFF MANAGEMENT**

- Responsibility to provide general advice and assistance to staff and managers – including training and development needs.

This is not an exhaustive list of duties and responsibilities, and the post holder may be required to undertake other duties, which fall within the remit of this role.

This Job Description covers the current range of duties and will be reviewed from time to time. Smith Partnership reserve the right to change the Job Description if the business requires it.

### Client Engagement Assistant - PERSON SPECIFICATION

| Requirement                                                                         | Essential | Desirable | How assessed |
|-------------------------------------------------------------------------------------|-----------|-----------|--------------|
| <b>Education &amp; Qualifications</b>                                               |           |           |              |
| Educated to Degree level or equivalent experience                                   | Y         |           | A            |
| Commitment to ongoing professional development                                      | Y         |           | A/I          |
| <b>Experience</b>                                                                   |           |           |              |
| Previous experience of working/providing support in a professional services setting |           | Y         | A/I          |
| Demonstrable experience in an administrative role.                                  | Y         |           | A/I          |
| Experience in a client/customer focused role.                                       | Y         |           | A/I          |
| <b>Professional Knowledge and Skills</b>                                            |           |           |              |
| Knowledge of legal technology and case management software.                         |           | Y         | I            |
| Desire to build and develop client relationships and provide a professional service | Y         |           | A/I          |
| Excellent verbal and written communication skills                                   | Y         |           | A/I          |
| Strong IT skills in MS office and ability to adapt to new technologies              | Y         |           | A/I          |
| Excellent planning and organisation skills                                          | Y         |           | I            |
| <b>Personal Attributes</b>                                                          |           |           |              |
| Strong analytical and problem-solving skills                                        | Y         |           | I            |
| Ability to work under pressure and meet deadlines                                   | Y         |           | I            |
| Empathetic approach, with the ability to handle sensitive situations                | Y         |           | I            |
| High level of attention to detail and organisational skills                         | Y         |           | A/I          |
| A proactive and enthusiastic team player                                            | Y         |           | I            |

**Key:**

A – Application

I- Interview

This job description may be amended at any time in consultation with the postholder.