

JOB DESCRIPTION

Job Title:	Client Engagement Agent
Department:	Residential Conveyancing
Responsible to:	Senior Associate
Responsible for:	n/a
Location:	2 North Street, Queens Chambers, Newport, NP20 1TE (with flexibility to work from other Harding Evans premises if required)

1. Role/Job Purpose

- Responsible for successful communication channels and points of contact between the firm and its customers as well as development of client engagement and retention via actively promoting firm's services to maximise client reach, whilst maintaining quality standards and performing well against KPIs.

2. Role Requirements

- To ensure a smooth process in handling all of the aspects of on-boarding a client.
- Responsible for a wide range of duties from account opening to account maintenance, to internal Partner support with extensive client interface.
- To provide quotes to prospective clients face-to-face, by telephone and by email.
- To be the firms' first point of contact with a prospect.
- Assist with proactively managing client relationships to maintain and improve client satisfaction and retention.
- To obtain the initial client information
- Handle client enquiries via phone and e-mail; provide required information in a timely manner.
- To conduct quality assurance via questionnaires and telephone communication.
- Develop excellent working relationships with the team and the broader organisation.
- To open case files and produce the relevant initial paperwork to clients.
- Checking all contact information is correctly recorded for all clients and prospects.
- Chasing any outstanding paperwork/information from clients to be able to progress a case.
- To ensure all GDPR and confidentiality regulations are adhered to at all times.
- To exercise sensitive management of the details received during conversations with the client.
- To provide high quality customer service to all clients and contacts.
- Participate in initiatives to improve the client and account management process.
- To contact existing commercial clients promoting our webinars, events etc.
- To appropriately cross sell the services of other Dept's within the Firm at relevant stages of a matter.
- To maintain active logs of client engagement/retention to provide to Line Manager.
- To support and cover other team members when needed.
- To maintain a friendly and positive attitude as this is a client-focussed role.
- To undertake other tasks in line with the role, as instructed by Line Manager.
- To work in accordance with quality standards.
- To capture and record information so that KPIs can be measured.

3. Person Specification

Professionally based qualifications, skills and experience

Essential

- Over 1 year previous experience of client/customer service
- Previous sales experience
- Highly IT-literate with skills in word, excel and record keeping.

- Excellent written and verbal communication skills, with attention to detail
- Experience of working in a legal/professional services environment

Desirable

- Customer Service qualification

Personal Skills and qualities**Essential**

- Self-motivated team player
- The ability to prioritise and manage own workloads effectively
- Ability to adapt to new scenarios
- The ability to work under pressure and meet deadlines
- Ability to develop relationships, particularly with potential clients/contacts
- Ability to exercise compassion and discretion with client information
- Confident in communicating via phone, email and written correspondence
- The ability and desire to contribute any ideas to Line Manager to promote or improve the services we provide