

Intake Manager

Job Summary:

We are seeking a highly motivated and experienced Intake Manager to join our dynamic general law firm. As the Intake Manager, you will play a pivotal role in enhancing client satisfaction by developing and implementing effective phone scripts, metrics, policies and procedures for our intake department. This position requires a strong leadership presence as well as some sales experience, overseeing training programs, and demonstrating proficiency in CRM software.

The ideal candidate will share our Firm's Core Values:

- **Quality is Job #1:** I always strive for the best result through superior effort. I embrace the "measure twice, cut once" principal. Rate your staff on this core value and provide an example associated to the rating you gave for them.
- **I always strive for the best result through superior effort:** I embrace the "measure twice, cut once" principal.
- **Mistake to Mastery:** I know mistakes happen. When they do, I acknowledge and learn from them.
- **Positive and Professional:** I cannot always control what happens. I can and will control how I respond. I always strive to have a positive mindset.
- **1% Rule:** I am always looking for ways for the firm to improve.
- **Excellent Client Experience:** At the conclusion of the engagement, the client will return to us for future legal assistance and confidently refer to their friends and family.

Responsibilities:

1. Hiring:

- Assist HR with hiring within the intake department.
- Work with HR on any employee coaching's as needed.

2. Phone Script Development:

- Create and refine phone scripts to ensure consistent and professional communication with clients that results in an increase of scheduled consults and conversions to retained clients.
- Adapt scripts to add various client inquiries, providing accurate information, pairing with an attorney that best suits the client's needs while maintaining a client centric approach.
- Review the transcribed calls in the CRM system to ensure that the intake team is hitting all the points outlined in the phone script while evaluating the client responses and feedback.

3. Metrics and Performance Analysis:

- Establish and monitor key performance indicators (KPIs) to evaluate the effectiveness of the intake team.
- Conduct regular performance reviews and provide constructive feedback to enhance individual team performance based on our Firm's Core Values.

- Identify training needs and coordinate ongoing professional development programs to enhance the team's skills and knowledge.
- 4. Policies and Procedural Development:**
- Work with COO on implementing standard operating procedures (SOPs) to streamline the intake processes.
 - Ensure compliance with legal and ethical guidelines in all client interactions.
- 5. CRM Software Management:**
- Possess a strong understanding of CRM software.
 - Utilize CRM tools to track client interactions, manage cases, and extract actionable insights for continuous improvements.
 - Coordinate with the marketing department on certain PNC based projects.

Qualifications:

- Bachelor's degree in business, Communications, or a related field preferred but not required.
- Strong leadership and communication skills.
- Familiarity with CRM software and the ability to leverage technology for process improvement.
- Exceptional organizational and problem-solving abilities.
- Knowledge of legal terminology and procedures a plus.
- Proficiency in Microsoft Office.
- Motivated Self-Starter.

Benefits:

- Salary to be commensurate with experience.
- Health, dental and vision insurance
- HRA provided.
- 401K available
- Professional development opportunities
- Collaborative and inclusive work environment

If you are passionate about delivering excellent client experiences in a legal setting and possess the skills to lead and develop a high-performing team, we encourage you to apply. Join us in providing exceptional service to our clients in their legal journey.

To apply, please submit your resume and cover letter detailing your relevant experience and your approach to improving client service in a legal context along with your desired salary range to info@pzlzlaw.com. The subject line must read: "I'm the right intake manager for your firm" and the email must be 12 pt. sized font.

All inquiries will be confidential. No phone calls - E-mail only