

JOB DESCRIPTION

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| Job Title: | Private Client Solicitor |
| Department: | Private Client |
| Location: | Rosehill office, CA1 2RW |
| Reporting to: | Head of Department |

1. **Job purpose:**

Reporting to the Head of Department, your role includes delivering high quality legal services to clients, performance and risk management and business development activities.

The role requires management and control of your caseload, workload, and risk management in relation to your role. It includes helping to develop relationships across departments and offices, as well as interaction with other law firms and professionals. The role also involves you working with the leadership team from time to time, assisting in the design, delivery and implementation of system changes, workflow and process improvements, as well as being involved in business development activities to promote the office and the business as a whole.

2. **Main duties and responsibilities:**

- To operate within a departmental structure delivering providing a consistent, excellent standard of legal services to our clients.
- Ensuring that tasks and clients allocated are dealt with promptly, and in a cost effective and efficient manner in accordance with the policies and regulations set by the Company and the Code of Conduct of the Solicitors Regulation Authority.
- Attending upon clients to take instructions and advising on the most appropriate course of action to meet clients' needs; taking appropriate action in executing clients' instructions in a timely manner.
- Using Proclaim case management software to manage and run your matters on a daily basis
- Deal with matters appropriately, including communication with clients over the telephone, by email and in face-to-face meetings, and with other solicitors and professional organisations over the telephone, by email and correspondence.
- Liaising with the office lead and other staff to ensure adequate cover within the department at all times, and to attend to clients of other fee earners in their absence, where this is appropriate.

- Prioritising your workload, maintaining accurate records of time spent on all activities, ensuring that bills are presented on time and that the agreed procedures within the Company relating to case management and file control are adhered to.
- You will help with regular reviews of the systems, controls and processes to determine whether they are fit for purpose as the environment and service delivery requirements change.
- To ensure quality reviews as directed, such as file audits, are conducted and recorded on time.
- To achieve personal and team targets, audit and quality requirements, service level agreements (SLA), and key performance indicators (KPI).
- Monitoring your personal performance against agreed targets and objectives, and also the performance of staff for whom you are directly responsible, highlighting areas of inefficiency and ineffectiveness, taking action where necessary to improve any deficiencies.
- Maintaining professional competence through continuous professional development, and maintaining relevant training records which satisfy the current regulations and requirements as specified by The Solicitors Regulation Authority (SRA).
- Carry out business development activities acting as an ambassador for the firm, taking a proactive approach to build professional relationships with clients and other contacts.
- Assisting in the supervision of junior solicitors, trainee solicitors, paralegals and supporting staff as required in accordance with your experience.
- Undertaking other duties of a reasonable nature which may be requested from time to time.

July 2020