

Position Description

INTAKE SPECIALIST

MISSION STATEMENT

To warmly and compassionately greet callers (and sometimes visitors), making them feel welcome and comfortable.

To make the best first impression on clients and all prospective clients, whether we take the case or not.

To recognize a client we want to help, and determine whether an avenue of recovery may exist.

To get potential clients that we can help in the door as promptly as possible.

To help injured callers get the help they need.

To create raving fan clients, and help the business and law practice grow and thrive.

RESULTS / OUTCOMES (What you must get done.)

- Conduct a brief but sufficient and thorough conversation by using the correct and most effective questions in order to determine liability, damages, and source of recovery.
- Immediately schedule potential clients for a meeting with the attorney, to take place as soon as the client can come in, or if necessary, as soon as the attorney can go to the client.
- Within 5 minutes of phone intake, schedule follow up calls to potential clients who have not yet agreed to meet with an attorney.
- Within 30 minutes of attorney evaluation, schedule follow up calls to potential clients who have not signed a retainer.
- Achieve 95% success rate in signing new callers who we can and want to help.
- Proportionately contribute to overall client satisfaction and firm revenue goals.

DUTIES / RESPONSIBILITIES

Telephone Intakes

- Establish rapport with potential clients immediately over the phone.
- Answer calls and emails from potential clients about their claims, schedule for attorney intake
- Post all new cases on intake sheets, and messages, in needles promptly and accurately.
- Research the potential client and case to help inform paralegals and lawyers about the viability of the case.
- Sets the tone and pace of the client case evaluation.
- Become familiar with our referral list to help direct and refer callers we cannot help.
- Keep track of cases that we have referred to attorneys with whom we associate.
- Weed out unwanted callers.

- Help the paralegals with data entry and other office tasks when not receiving calls or visitors.
- Help create a positive team environment by communicating with each team member to ensure all potential new clients are given prompt attention.
- Deadline new intake sheets for follow-up / sols / declination
- Draft declination letters with appropriate SOL language.

Administrative support

- Manage and update provider contact information in Needles.
- Data entry for new cases, and other various tasks.

REQUIREMENTS

- Positive, confident, charismatic, influential, intelligent, and compassionate person.
- Conveys confidence on the phone and in-person
- Strong active listening skills.
- Intelligent analytical ability to determine liability, damages, and source of recovery.
- Comfortable and confident in selling legal services.
- Empathy for injured clients, with ability to put them at ease during their difficult time.
- Exceptional communication skills, verbal and written.
- Influential in helping client to realize that Parnall Law Firm is the best choice in personal injury representation.
- Organized, focused, and attentive to all intakes and follow-ups.
- Resourceful in helping investigate and uncover root of legal issues.
- Enthusiastic ability to absorb guidance and training in intakes, insurance law, and personal injury cases generally.
- Professional attire and demeanor.
- Treats a call at 4:30 on Friday with the same care and compassion as one on Monday morning.
- Able to follow loose script and avoid giving legal advice.
- Computer and typing skills. Enthusiastically absorbs training in case management software.
- Inbound sales experience a plus.
- Personal injury law (particularly plaintiff) experience a plus.
- Team player. We are strong believers in teamwork. If you are not a team player, this job is not for you.