

Position Descriptions

RECEPTIONIST

MISSION STATEMENT

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

To make the best first, continued, and lasting impression on clients and all visitors and callers, including lawyers, doctors and other providers, witnesses, court reporters, insurance adjusters, etc.

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

RESULTS / OUTCOMES (What you must get done.)

- Direct calls to the right person with as much efficiency and diplomacy as possible.
- Weed out unwanted callers.
- Help create a positive team environment by communicating with each team member to ensure all callers and visitors are given prompt attention.
- Provide prompt and courteous service for every caller and visitor.
- Become familiar with clients and callers to help document the case and handle client issues that arise, whether the paralegal can help or not at that moment.
- Posting all messages in Needles promptly and accurately.
- Helping the paralegals with data entry and other office tasks when not receiving calls or visitors.
- Proportionately contribute to overall client satisfaction and firm revenue goals.

DUTIES / RESPONSIBILITIES

Reception/Customer Service

- Answer phones (direct caller to person who can help them – or if unavailable, help them)
- Transfer phones to / from Answering Service at 8 AM / 5 PM
- Greet people at door and offer them beverages/try to make them comfortable
- Intakes
 - Print intake sheets / Googlemap from intake screen
 - Let attorney and paralegal know that client/intake/etc. is here
 - Let attorney know when finished with intake forms and have intake forms ready to hand to attorney
 - Shut door for meetings if needed
 - Know what / where intake forms are
 - Call to confirm appointments with prospective clients, note on calendar
 - Photograph new clients after intakes, vehicle damage, download to FC
 - Have provider list and other contacts available for attorney

Housekeeping

- Make sure water and coffee is available
- Clean/organize front area, copy room and conference room

Position Descriptions

Correspondence

- Get mail from front door
- Open all mail, date stamp, sort
- Address thank you cards/holiday cards (aside from the new cases)

Calendar

- Make general appointments at attorneys' request (i.e. meetings, CLEs, Rotary, events, etc)

Data Entry

- Post case and provider information into Needles

Discovery

- Typing answers

Miscellaneous

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