

Portcullis Legals – Job description: Client Journey Executive

Role: Client Journey Executive

Salary Scale: £19,000 to £23,500 per annum

Hours: 39 hours per week

Work base: Portcullis Legals Ltd based at Portcullis Law Store, 246 Dean Cross Road, Plymstock, Plymouth, PL9 7AZ (*Due to the ongoing pandemic some flexibility around location of work may be required, such as home working*)

Context of the Role:

You will support each and every single client through their journey with Portcullis Legals. From an initial enquiry or lead through to the completion of their case, you will ensure the highest standard of customer service and timely communications both digitally and face to face.

You will have passion in everything you do and be prepared to go the extra mile to ensure clients feel nurtured, receive great service and recommend the Portcullis Legals experience.

Reporting to: Chief Operating Officer

Main Duties and Responsibilities

- Open and maintain client accounts by recording account information in line with Portcullis Legals processes and digital software (CRM)
- Welcome guests and clients in person or on the telephone; answering or directing enquiries.
- Filing, organising, scanning, copying and faxing legal documents
- Scheduling client meetings on behalf of clients advisors
- Provide a payment process through issuing of invoices, taking payments and issuing receipts
- Manage a consistent stream of sales leads for external stakeholders and 'walk ins'
- Understand and hold the ability to recommend services relevant to the needs of the client
- Contribute to team effort by accomplishing related targets for the firm
- Identify and assess clients needs to achieve satisfaction
- Build sustainable relationships of trust through open and interactive communication
- Keep records client interactions and file documents
- Resolve customer complaints or concerns via phone, email, mail or social media (where appropriate)
- Manage the postage process for incoming and outgoing mail

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- Make regular visits to the storage vault to obtain client files, recording effectively in line with processes
- Any other duties required by the Chief Executive Officer or Chief Operating Officer

Person Specification

1. At least two years of experience in a hospitality or customer service role
2. An understanding of how to utilise customer databases/CRM systems
3. Competent IT skills and experience of Microsoft packages (including Word, Excel and Powerpoint)
4. Evidence of strong organisational skills
5. Ability to work under pressure and prioritise work load
6. Excellent communication (both written and verbal)
7. High levels of energy, resilience and self-motivation
8. Proven problem solving and analytical skills
9. Demonstrate a passion for excellent customer service
10. Flexible approach and willingness to work as part of a team

Benefits:

- 4 day working week (on completion of probation period)
- 25 days annual leave (pro rata), bank holidays (pro rata), and an additional 2.5 days to be taken between Christmas & New Year (pro rata)
- 3% contributions to employer's pension scheme
- NHS top up healthcare plan (including Employee Assistance Programme)

Deadline for applications: 9:00am on Monday 4th January 2020

Interview date: W/C 11th January 2020

(With social distancing rules in place interviews may take place via video call)

To apply: Please send your CV and covering letter addressing the each point in the person specification and send to suzi@portcullislegals.co.uk