**Client Relationship Executive (Private Client)**

**Department:** Private Client  
**Reports to:** Head of Department   
**Location:** Hinckley

**Purpose of the Role**

To provide exceptional client care and administrative support within the Private Client department, ensuring a seamless experience from the initial enquiry through to matter completion. The Client Relationship Executive will act as the first point of contact for new clients, guiding them through the process with empathy and professionalism, while maintaining compliance with firm procedures and supporting fee earners in delivering outstanding service.

**Core Competencies**

**1. Professional Knowledge & Expertise**

* Demonstrates understanding of Private Client services (Wills, Probate, LPAs).
* Provides accurate information to clients about processes, timescales, and service options.
* Completes AML checks, file openings, and client onboarding in line with firm policy.
* Understands regulatory requirements and data protection principles.
* Supports fee earners with administrative tasks and client liaison to ensure timely progression of matters.

**2. Technology**

* Confident in using the firm’s case management system and Microsoft 365 tools.
* Accurately logs and tracks new leads using the firm’s lead tracker.
* Uses digital tools to manage client communications and documents efficiently.
* Identifies opportunities to streamline processes through effective system use.

**3. Client Service & Relationship Management**

* Acts as the welcoming first point of contact for new clients, both in person and by phone.
* Builds rapport and trust with clients through empathy, professionalism, and active listening.
* Guides clients through their legal journey, providing reassurance and regular updates.
* Ensures clients are matched with the right fee earner for their needs.
* Follows up on new enquiries to convert potential leads into instructions.
* Checks in with clients during and after their matter to ensure satisfaction and request feedback.
* Promotes other relevant services in line with client needs (cross-referral).

**4. Communication Skills**

* Communicates clearly, confidently, and sensitively with clients, colleagues, and third parties.
* Drafts professional correspondence, engagement letters, and client updates.
* Provides accurate written information and explains legal processes in plain English.
* Escalates issues appropriately to fee earners or Head of Department.

**5. Teamwork & Collaboration**

* Works closely with fee earners, paralegals, legal assistants, secretaries and management to ensure excellent client outcomes.
* Shares best practices with colleagues to improve client onboarding and retention.
* Contributes to a positive, supportive team environment.

**6. Organisation & Time Management**

* Prioritises workload effectively, balancing client contact with administrative tasks.
* Monitors enquiry response times to ensure prompt follow-up.
* Maintains accurate and compliant records at all times.

**Key Responsibilities**

* Handle new enquiries (by phone, email, and in person) for Wills, Probate, and LPAs.
* Explain legal processes, expected timescales, and fees clearly to clients.
* Book client appointments with the appropriate fee earner.
* Open new matters, complete AML checks, and request money on account.
* Prepare and send initial client care letters and documentation.
* Maintain contact with clients throughout their matter to ensure satisfaction.
* Log and track enquiries on the lead tracker and follow up on pending leads.
* Gather and record client feedback post-completion.
* Support the department’s business development and marketing initiatives.

**Experience & Skills Required**

* Previous experience as a **Legal Secretary** or **Legal Assistant**.
* Excellent communication and client service skills.
* Strong attention to detail and organisation.
* Confident using case management systems and Microsoft 365.
* Empathetic and professional approach to sensitive client matters.

**Values & Behaviours**

* Upholds the firm’s ethos of *Modern Law with the Human Touch*.
* Treats clients and colleagues with respect and understanding.
* Strives for continuous improvement in service delivery.
* Demonstrates integrity, accountability, and care in all interactions.