

Client Intake Specialist

- Do you believe in helping others without condescension or judgment? Our focus is on helping clients resolve significant financial problems.
- Do you thrive in a work environment requiring attention to detail and accuracy with a self-reliant approach?
- Do you demonstrate a good deal of patience working within a routine and or activities?
- Are you a good listener who is motivated to discreetly analyze and understand the prospective client's needs?

Position Summary

The Client Intake Specialist (CIS), who will be the first impression for our firm, plays a valuable role by performing the intake process to identify potential new clients who are a good fit for the firm. The CIS will set up and manage the process of client engagement and facilitate the transition to the client's assigned legal team. The CIS will be responsible for managing accurate intake data using various applications.

The successful candidate will empathize with callers who may be dealing with challenging or deeply personal situations. Excellent interpersonal and communication skills, mainly by phone and email, are a must. Our client-focused environment requires a patient, dedicated, highly productive individual who possesses a sense of urgency, can take direction, is a team-player, and can execute tasks independently with poise.

Responsibilities

- Answers calls and emails transferred to the intake team and assists potential new clients (PNCs) with initiating the firm's intake process
- Assists PNCs with scheduling a consultation
- Follows up with PNC client leads from marketing-generated activities
- Follows up with PNCs who were no-shows or did not choose to schedule a consultation
- Maintains data quality in our Lawmatics CRM and ensures records are updated with all required client information
- Updates information in the firm's case management system
- Obtains payment for paid consultations and firm engagement
- Introduces new clients to their assigned legal team
- Addresses PNC questions throughout the intake and engagement processes
- Collaborates well with sales teammates, including Client Service Coordinators and Client Administrators

Qualifications

- Technical degree or higher level of education required
- A minimum of two years customer service experience with heavy call volume
- Client intake experience is preferred
- Strong communication, interpersonal, and customer service skills
- The ability to multitask and manage time efficiently
- Attention to detail and accuracy are essential
- The ability to work independently and as part of a team



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- Proficient with Microsoft Office, Google, and Adobe applications and easily adapts to legal cloud-based applications

What we offer:

- Generous benefits package
- Competitive compensation
- Accrued paid time off
- Employer-provided health insurance
- Dental and vision insurance are available
- Paid group disability and life insurance policy
- Up to 4% 401K match
- An annual retirement contribution from the firm's profit-sharing plan
- Paid parking or monthly MARTA fare
- The position also includes a further growth opportunity to sell our legal services directly to clients once the Client Intake Specialist can successfully sell paid attorney consultations. In our fast-growing law firm, the ability to gain more responsibility and grow with the firm is a possibility.

Compensation:

\$50,000 total compensation on target:

\$45,000 salary + 10% uncapped bonus for hitting performance goals

About Wiggam Law

An established tax law firm located in Midtown Atlanta, we were recognized as the 4th fastest-growing law firm in the U.S. in 2020, according to the Law Firm 500! We zealously advocate for our clients against the IRS, Georgia Department of Revenue, and other state revenue agencies.

We value integrity and teamwork, and while we have uncompromising standards of care and conduct, we love to have fun and reward our team.

To apply for the position, please email us your resume and cover letter to admin@wiggamlaw.com.