Legal Intake Specialist

Job Description

Main Objectives
Legal Intake Specialists are the client's first point of contact with the firm.

1. Client Contact. Reach out to leads within 30 seconds of receipt and follows up on all leads in a timely manner.
2. File Documentation. Input all information properly for lead evaluation. If it's not in the file, it didn't happen.

The Intake Team's main objectives are to evaluate potential new client cases and sign-up cases that have been identified as meeting the firm's criteria.

Tasks
Legal Intake Specialist I:

- Ensure all data entered in Salesforce is always accurate and up to date
- Answer incoming calls and route to appropriate team member or Legal Intake Specialist II team
- Document all transfers in the appropriate client's case
- Assist with Intake Department tasks as assigned by Intake Manager

Legal Intake Specialist II:

- Ensure all data entered in Salesforce is always accurate and up to date
- Speak with potential new clients and obtain required data to evaluate case
- Sign up new client or schedule appointment with Investigator for in person sign up
- Set up client with initial medical treatment, notify provider and request LOP
- Follow up on leads timely
- Escalate applicable calls to Intake Manager or Legal Intake Specialist III for signing
- Maintain 60% conversion percentage each month (All Leads)
- Maintain 100% conversation percentage each month (Wanted Leads)

Legal Intake Specialist III:

- Ensure all data entered in Salesforce is always accurate and up to date
- Speak with potential new clients and obtain required data to evaluate case
- Sign up new client or schedule appointment with Investigator for in person sign up
- Set up client with initial medical treatment, notify provider and request LOP
- Follow up on leads timely
- Escalate applicable calls to Intake Manager for signing
- Maintain 60% conversion percentage each month (All Leads)
- Maintain 100% conversation percentage each month (Wanted Leads)