



JOB DESCRIPTION

Senior Associate



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Position	Senior Associate
Department	Wills and Probate
Reporting to	Head of Department
Office	Bishop's Stortford

Overall Purpose

To provide efficient and effective legal advice, assistance and representation for all clients maintaining the highest standards of professional expertise and client care at all times. To make every effort to obtain a satisfactory result for the client, to be accessible to the clients and to maintain regular and appropriate contact with them. To be expected to deal effectively and considerately with people from different cultures and backgrounds.

To work together with other fee-earners, support staff and with other teams to ensure the best quality service. To begin to develop your practice area and start to develop your leadership skills.

Main Tasks

TECHNICAL

- » To communicate and update Principal Associates and Partners about the level of work, type of client and the value of the matter
- » Develop and maintain up to date technical knowledge and start to build a specialised area of work
- » Negotiate solutions to clients' issues
- » Plan, manage and progress legal cases and transactions
- » Draft and review legal documents to a high standard
- » Communicate and update Partners on each matter
- » Understand and assess a client's commercial and personal circumstances, their needs, objectives, priorities, and constraints
- » Ensure that advice is informed by appropriate legal and factual analysis and identifies the consequences of different options
- » Draft documents which are legally effective and accurately reflect the client's instructions including: drafting documents from scratch as well as making appropriate use of precedents; addressing all relevant legal and factual issues; complying with appropriate formalities; and using clear, accurate and succinct language

- » Undertake effective spoken and written advocacy
- » Keep colleagues informed of progress of work, including any risks or problems

FILE MANAGEMENT

- » To make practical suggestions to the Department
- » To be compliant with the Firm's policies and procedures
- » To maintain a high standard in Lexcel compliance
- » Take responsibility for management of the matter
- » Make effective use of information management systems (whether electronic or hard copy), including storing and retrieving information
- » Comply with confidentiality, security, data protection and file retention and destruction requirements

CLIENT CARE

- » Maintain a successful working relationship with client care to establish an excellent client care service
- » Liaise with client care regarding complaints and take responsibility when required
- » Develop and maintain a successful working relationship with client care to establish an excellent client care service
- » To exercise a high standard of client care in a professional and polite manner at all times
- » To show understanding of client's needs and tailor advice accordingly
- » Identify, meet, manage and exceed client's expectations
- » Provide a bespoke service but maintain uniformity of delivery
- » Adhere to the Principles of the code of conduct in relation to client care and service delivery
- » Maintain required standard of CSE accreditation
- » Report all concerns and breaches to client care

FINANCIAL

- » To have overall responsibility for managing debt and debtors for own matters
- » Mentor and support Associates with their financial targets
- » To achieve designated levels of billing, cash and time recording targets
- » Demonstrate an adequate understanding of the commercial, organisational, and financial context in which you work and your role in it
- » Understand the contractual basis on which legal services are provided, including where appropriate how to calculate and manage costs and bill clients
- » Price setting/methods of prices

BUSINESS DEVELOPMENT

- » Create and present seminars and presentations regularly
- » To regularly develop marketing initiatives that support and strengthen the Firm's reputation
- » To build own client base

- » To formulate own marketing plan in conjunction with the Marketing team
- » In liaison with the Head of Department and other Partners to be active in promoting the services of the Firm and to identify cross selling opportunities
- » To be proficient in regularly writing blogs and newsletters
- » To utilise Social Media to support the firm's growth, image, and ethos
- » Regular attendance at virtual and face to face trade fairs, exhibitions, networking, and other social events

COMPLIANCE

- » To be compliant with the Firm's policies and procedures
- » To maintain the required standard in Lexcel and CQS compliance
- » To comply with the SRA Principles and code of conduct

COMMUNICATION

- » To regularly communicate with Principal Associates and Partners/Legal Directors and ask for support when needed
- » To build good working relationships with all members of the Firm
- » To build good working relationships with external institutions and organisations
- » Support and mentor Associates with their verbal and written communication
- » To demonstrate excellent verbal and written skills for clients
- » To exercise a high standard of client care in a professional and polite manner at all times
- » To ensure that all client work is progressed expeditiously, and that the client is regularly informed on progress and costs
- » To work closely with the support team and support staff and to ensure a high level of respect and regard is demonstrated in all communication
- » To maintain clear and precise communication with other personnel of the Firm
- » Communicate clearly and effectively, orally and in writing
- » Use the most appropriate method and style of communication for the situation and the recipient(s)
- » Establish and maintain effective and professional relations with clients
- » Provide information in a way that clients can understand, taking into account their personal circumstances and any particular vulnerability
- » To ensure at all times that our services are delivered in a timely manner

SELF-DEVELOPMENT

- » To attend learning events that further strengthen specialised technical skills
- » To attend learning events that further strengthen soft skills
- » To develop junior staff depending on learning needs
- » To take responsibility for own self-development, in liaison with Department Head, by complying with relevant compulsory continuing professional education requirements
- » To undertake research as and when requested

- » To supervise, support and develop any immediate support staff with appropriate training as agreed with Department Head and Business Support
- » Delegate tasks when it is appropriate to do so

LEADERSHIP AND MANAGEMENT

- » To mentor, supervise and support Associates in the Department
- » To develop ongoing leadership initiatives within the Department
- » To supervise, support and develop any immediate support staff with appropriate training
- » Delegate tasks when it is appropriate to do so

FIRM MANAGEMENT

- » To work with the Operational Board to implement new procedures and initiatives within the Department and firm wide
- » To ensure the confidentiality and security of the Firm's and client's documentation and information

This job description is not a definitive list or exhaustive list of responsibilities but identifies the key responsibilities.

Job Specification

Essential	Desirable
Qualifications	
Minimum of 5 year's ppe To have experience of general Probate work Ability to draft and review legal documents which accurately reflect the client's instructions Ability to develop client relationships and identify areas for expansion of work	
Skills	
Ability to work under own initiative, anticipate challenges and deal with them proactively Ability to communicate effectively both verbally and in writing with a diverse range of persons/organisations Ability to work unsupervised and decisively to provide sound and clear advice on own initiatives Ability to work under pressure and meet tight deadlines	Ability to train, coach and mentor colleagues within the team Ability to develop and express creative proposals for continuous improvement of services A commitment to Lexcel/Quality Management standards Ability to develop leadership skills

Ability to plan and prioritise work effectively to meet own objectives and those of the team

Ability to adapt to change

Flexible approach to teamwork with a willingness to provide cover in colleague's absence and to pick up work outside of own specialism if necessary

Ability to learn and master new areas of law and legal practice quickly

Ability to evaluate information in complex situations and the confidence to take sound decisions independently

Drive, enthusiasm, versatility, and self-motivation

IT Skills:

- » Microsoft Office
- » Case management
- » Digital Dictation

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