

## Client Liaison & System Champion

As the Client Liaison & System Champion you are responsible for the delivery of excellent client service and the training of staff to ensure client service delivery is consistent using internal systems, across the firm. In this hybrid role you will utilise your in-depth knowledge of the business operations, family law process, the administration roles and the firm's systems across a significant technology stack. You ensure the implementation and delivery of training and development programs. A particular focus will be the delivering of training which continually up-skills our people, developing their confidence and capability. You ensure client service, across the entire team, from initial contact to final invoice, reflects the principles and values of the firm.

### Performance indicators

S.no	Performance indicator	Measurement of performance indicator	Assessment period
1	Process development and implementation	Ensure that existing client service processes are adequate, fit for purpose and where lacking, modified or new ones are developed. Create a quality audit and review processes from outcomes of quality audit. Write and transition all staff to new process to ensure consistent outcomes for clients, across the team and firm.	6 months
2	Quality assurance.	Create, implement, measure, monitor and minimise breaches of client service standards. Client service standards include document and matter management. Conduct analysis, training and new process improvement to address issues. Review to ensure excellent client service processes are being adhered to and conduct regular QA assessments of client service delivery and update processes when required.	6 months
3	Address issues of client service quality.	Responsible for customer complaint investigations. Ensure complaint process is followed to reduce risk to brand. Create, implement and maintain a client complaint process with standard response rates met >90%. Understand the legal processes around client complaints, cost agreements, notifications and compliance. Report to management on client complaints, their resolution and resultant system improvements.	6 months

S.no	Performance indicator	Measurement of performance indicator	Assessment period
4	Training completed.	>90% of essential training completed within deadline. Scheduling of training 30 days post approval date.	6 months
5	Training budget.	Ensuring training provided within budgets. Training approved/rejected 10 days post request date.	6 months
6	Team Management	<p>Ensure training is adequate for people to meet their performance objectives. Ensure training reviews are set and conducted within business timeframes in a fair and impartial manner, and individual/team learning development plans are implemented and reviewed accordingly.</p> <p>Lead by example, being customer focused, demonstrating professional behaviour and fostering positive team morale, consistent with the business values.</p> <p>Ensure new people are welcomed and inducted into the business with training that is structured, appropriate and thorough.</p> <p>Liaise with other team members to ensure your role fulfils business needs as they arise for training and development.</p> <p>Assist solicitors in maintaining their Continuing Professional Development obligations.</p>	6 months
7	Satisfaction.	Internal training rated at >90% satisfaction.	6 months
8	Quality Training Systems and schedules	Create, implement and maintain training systems and schedules for all staff utilising technology and HR systems. Ensure system documentation is adequate and updated. Maintain training efficiency, so maximum training is available with minimal face to face training time. Remove duplication and repetition in training tasks using video. Develop training modules that create staged competency development and keep up to date and relevant to business and staff needs. Be knowledgeable about and maintain best practice training methodologies.	6 months

S.no	Performance indicator	Measurement of performance indicator	Assessment period
9	Accurate and Timely Data Collection and Reporting.	<p>In liaison with management ensure training and client services outcomes are set and reported regularly.</p> <p>Ensure pre-work is ready for solicitors 48 hours prior to appointments and the meeting outcomes are accurately documented immediately following the meeting.</p> <p>Data &amp; action points are entered immediately after the meeting and client data is inputted 100% accurately into the system</p>	6 months
10	Workflow & Precedent system quality	<p>Structured workflow and precedents are created, implemented, maintained and updated. There is a reduction in the time taken to deliver client services and a clearer understanding of business procedures &amp; processes across the firm.</p> <p>A whole of team approach is used to deliver consistent client service outcomes. After 6 months of onboarding all people know how to access and use workflow and precedents. The system to implement and update workflow and precedents is documented and up to date.</p>	6 months
11	Compliance & File Maintenance & Client Information Management.	<p>Ensure all staff understand and perform data entry tasks to met legal, client service and compliance standards. All legal and personal data is captured and recorded accurately. Ensure all client related documents are filed and saved in appropriate folders as part of matter management according to company processes. Data to be updated immediately if anomalies are found in client matters.</p>	6 months

### Other roles and responsibilities

- Process and systems quality control, including matter management, workflow and precedents
- Training to ensure process and system adoption is consistent across the firm
- Ensure excellent client service outcomes
- Manage the firms training budget and ensure training objectives are met
- Oversee and coordinate staff training requirements and opportunities
- Maintain a working knowledge of training available within the legal industry
- Develop and deliver best practice training appropriate to the firm's needs
- Monitor and manage training completion rates, timeliness and quality
- Address issues of client service standards, report on breaches to client service standards and remedy

- Liaise with the team to provide and coordinate adhoc internal improvement training
- Ensure accurate data entry and compliance with legal standards
- Reporting to management on quality control and training
- Identify and implement continuous improvement in liaison with the management team

## **Previous experience**

- Demonstrated experience in the firms diverse technology stack
- Knowledge of tools, concepts and methodologies of QA
- Solid understanding of legal process in Family Law
- High level problem solving skills and persistence in implementation of solutions
- Ability to create, implement and maintain systems and processes.
- Solid experience maintaining high standards of client service.
- Carrying out process support and development
- Developing the ability to repeat processes to ensure consistency and excellent
- High level people skills to teach, train and implement change management
- High level people skills to respond appropriately to all customer feedback
- Responsible for service & customer complaint investigations
- High level process development skills, including workflow and precedents relative to Family Law.
- Ability to liaise with team members to determine and initiate steps for continual improvement
- Ability to multi-task and work under pressure
- Persistent approach to time management and professional organisation
- Maturity in dealing complexity and change.
- Ability to inject fun, build relationships and led people through change and learning.

## **Education**

- Tertiary qualifications in Training and Development/Coaching/Compliance or related discipline
- Experience in Legal software, systems, and processes
- Experience working in Family Law
- Process improvement, workflow experience, change management
- Experience in best practice training delivery