

JOB OPPORTUNITY

Residential Conveyancing Department -
Onboarding Co-Ordinator



**ECCLES HEDDON
SOLICITORS**

Job Title:

Residential Property Onboarding
Coordinator

Responsible to:

Head of Department -
Residential Property

Overview:

Helping clients at the beginning of their conveyancing journey, acting as the first point of contact and progressing matters through to instruction stage

Key Responsibilities:

Managing the onboarding process and coordinating with fee earners once matters are ready to be passed across

Core skills:

Organisation, communication and attention to detail

Working hours:

35 hours per week

Salary:

£24,700

Performance-related incentive:

- A bonus is payable based on the number of additional instructions onboarded compared to the same month in the previous year
- The incentive is calculated at £15 per additional instruction and paid monthly in arrears
- Only matters where the individual has had primary responsibility for onboarding will count

Main purposes of role:

1. Act as the first point of contact for prospective residential property clients
2. Plays a key role in converting enquiries into instructed matters.
3. Providing accurate quotations, following up outstanding quotes, maintaining clear records on the quoting system, and supporting a smooth start to the client journey.
4. Liaise with estate agents, promote the firm's service confidently and professionally,
5. Assist with general administrative tasks relating to the Residential Property department.

Job Responsibilities

1. Handle incoming enquiries from prospective residential property clients by telephone, email and other communication channels in a professional, friendly and efficient manner.
2. Build rapport by being enthusiastic and empathetic to enquirers, understanding that they are embarking on an exciting but life changing transaction.
3. Provide clear, accurate and timely quotations for residential property matters in line with the firm's pricing structure and service standards and using the firm's online quoting system.
4. Impart value as well as pricing to the prospective clients.
5. Explain the firm's conveyancing service and onboarding process clearly, helping potential clients understand the benefits of instructing the firm.
6. Transfer clients to Fee Earners for further explanation if judged necessary to land the business.
7. Diarise ahead to actively follow up quotations issued, monitor responses and chase prospective clients appropriately to maximise conversion of enquiries into instructions.
8. Assess accurately the correct fee earner for the role and ensure that the client knows who this will be and what the next steps will be in the onboarding process before the matter is passed to the fee earner.
9. Maintain detailed, accurate and up-to-date notes on the quoting and case management system so that all interactions and next steps are clearly recorded.
10. Keep estate agents and other relevant introducers updated at appropriate stages to support strong working relationships and encourage effective communication.
11. Identify and always escalate more complex legal or technical enquiries to the appropriate fee earner or manager where necessary - ensure you do not give legal advice.
12. Support the opening of new matters by ensuring initial information is captured accurately and relevant onboarding steps are progressed promptly by using the Redbrick and Unity case management systems.
13. Deal with new matters through the 'Quote' stage on Redbrick and only transfer to the fee earning team once all of the steps are fully completed and the onboarding process is concluded.
14. Be able to pull reports on both the quote system and Redbrick and Unity to provide management information for the Head of Department, Partners and Practice Manager.
15. Understand and deal with electronic identification and verification of clients, which includes interpreting the results of the EID&V system in place and being able to ask for more documents if Enhanced Due Diligence is required.
16. Have a basic understanding of Anti-Money Laundering, Financial Crime, PEP and Sanctions issues and be able to communicate to clients why the firm needs to take steps to manage risk in these areas as appropriate with the firm's policies and procedures.
17. Provide a high standard of client care at all times, ensuring that prospective and new clients receive a positive first impression of the firm.
18. If a client is unable to get through to their fee earner or their legal assistant at later stages of the matter, be able to answer basic questions about the progress of the matter and take messages to pass on to the fee earning team.
19. Deal with forwarding of enquiries from Lender Exchange and LMS to the fee earners and their assistants.
20. Assist with general administrative duties, including data entry, document preparation, diary management, filing, and other support tasks as required by the department.
21. Work closely with colleagues across the residential property team to ensure a smooth handover from initial enquiry to instructed matter.
22. Contribute to the continuous improvement of onboarding, enquiry handling and administrative processes.
23. Any other tasks as reasonably delegated by the qualified staff in the department, the Head of Department, the Partners, the Practice Manager or within the practice including providing cover for colleagues as and when necessary.