

Operations Support Specialist  
Full-Time, At-Will  
Location: In-Person (Traverse City)  
Shifts/Hours: Weekdays, 8a-5p  
FLSA Classification: Non-Exempt  
Pay: \$18.50 - 22.50  
Reports to: Sales & Marketing  
Last Revised: September 2024

## Job Description:

### Client and Admin Support Specialist

#### Job Summary

The Client and Administrative Support Specialist is a versatile role, essential to both daily operations and the client journey. This position requires an organized, charismatic, empathetic, and highly detail-oriented individual who can effectively balance assisting with firm operations while working closely with the Client Care team to ensure smooth and efficient support across all aspects of the client experience.

#### Essential functions

*Reasonable accommodation may be made to enable individuals with disabilities to perform these essential functions.*

- Reception and Guest Greeter: This role is responsible for fielding and redirecting incoming calls, screening as appropriate. This role will also greet clients, guests, attorneys, and employees, and create a positive and professional first impression on behalf of the organization.
- Manage Client Communications: This role plays a crucial role in the client care process by answering phone calls while ensuring client confidentiality, accurate documentation, and exceptional client care.
- Client Follow-Up: This role involves engaging with clients as they progress through the pipeline, addressing their inquiries and offering solutions to instill confidence as they determine next steps.
- Sales Support: This role involves assisting the Client Care team by closing leads, sending retainers, and processing client payments as needed.
- Deliveries: This role involves receiving deliveries and packages, promptly communicating with the office about all received items, disposing of junk mail, labeling documents, and replenishing and reordering shipping and mailing supplies as needed.
- Operations Support: This position is responsible for ensuring a welcoming lobby area, providing technical support in conference rooms, and keeping the waiting room and conference rooms clean and organized.
- Building Maintenance and Plant Improvements: This role involves collaborating with firm leadership to manage firm improvements by screening, recommending, and coordinating vendors, identifying and communicating maintenance needs, and processing invoices as directed by the firm owner/CEO.

- Notary Services: As necessary, this role is expected to verify the identities of signatories, witness the signing of important documents, administer oaths, and ensure the authenticity and legality of signatures and documents.
- Communication: This position ensures smooth information exchange between intake and other departments by maintaining strong attention to detail, and by completing documentation thoroughly with minimal errors/omissions.
- Support to Leadership: The employee holding this position will attend department and company meetings as necessary. The employee will work with leadership to improve the management of the reporting of leads and qualified leads. The employee will also be asked to provide administrative support to the firm's owner and CEO as necessary.
- Administrative Duties: This position will be responsible for assisting with various administrative tasks within the firm, such as managing employee calendars, coordinating firm celebrations and events, overseeing the cost-effective resupply of organizational needs (e.g., copier paper, water, etc), and performing other assigned administrative tasks.
- Abstain from provision of legal advice: In performing of this role, the employee may be asked legal questions by PNC's. Non-attorneys are prohibited by the Professional Rules of Conduct by the State Bar of Michigan and by the ABA rules of Professional Conduct from practicing law. Consequently, this employee must refrain from offering opinions which could be considered legal advice.
- Legal Assistant Support: This role serves as an "as-needed" backup to ensure all legal team deliveries are completed in a timely fashion, including the filing of court documents as instructed, and documents all related tasks in a manner consistent with firm standards.
- Other Duties: This position is expected to be flexible regarding tasks completed, and may assist with other general, legal, or administrative tasks as requested.

### Competencies

- |  |   |
|--|---|
| - Ability to identify process improvements | - MyCase                                      |
| - Accountability                           | - Resourcefulness                             |
| - Adaptability                             | - Strong communication skills                 |
| - Data entry                               | - Strong organization and attention to detail |
| - Intermediate computer skills             | - Time management                             |
| - Microsoft Office                         |   |

### Supervisory responsibilities

- This position has no supervisory responsibilities.

### Work environment and physical demands

This role operates in a professional office environment. Employees will work indoors using standard office equipment such as computers, phones, photocopiers, filing cabinets, and fax machines.

The position is largely sedentary, involving tasks performed while sitting. Some filing activities are required. Specific physical requirements include:

- Close visual acuity for tasks like preparing and analyzing data, transcribing, viewing a computer screen, and extensive reading.
- Ability to operate standard office equipment and keyboards.
- Walking short distances and occasional driving for material delivery.
- Lifting and carrying small parcels and packages.
- Standing, walking, and sitting.
- Stooping, kneeling, bending, and crouching (lifting up to 25 pounds).

### Travel

- Some travel (10-15%) may be required.

### Necessary education and experience

- Minimum: Two years of experience in a similar role. Willingness to obtain notary public certification.
- Preferred: Three years of experience in a similar role. Currently serving as a notary public.

### Affirmative Action/EEO statement

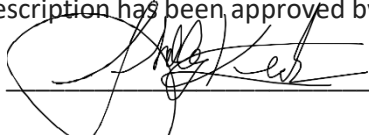
Wilson Kester is an equal opportunity employer. We celebrate diversity and are committed to creating an inclusive environment for all employees.

### Other duties

Please note this job description is not designed to cover or contain a comprehensive listing of activities, duties or responsibilities that are required of the employee for this job. Duties, responsibilities, and activities may change at any time with or without notice.

### Signatures

This job description has been approved by:

President:  \_\_\_\_\_ Date: \_\_\_\_\_

HR: \_\_\_\_\_ Date: \_\_\_\_\_

Employee signature below indicates the employee's understanding of the requirements, essential functions and duties of the position.

Employee \_\_\_\_\_ Date \_\_\_\_\_