Client Care Coordinator
Wilson Kester the Empowered Divorce Source

The Client Care Coordinator serves as the first point of contact for incoming calls from potential new clients inquiring about family law legal services. This role performs conflict checks, obtains information to determine whether the firm can resolve the potential client's legal matter, and provides essential support to the Client Care Specialist. The Client Care Coordinator communicates with potential clients, referral sources, professional contacts, and current clients seeking additional services, while coordinating with the Client Care Specialist for further support. This position reports to the Client Success Manager.

About Our Firm: Join Michigan's most prestigious and innovative family law firm, where we're revolutionizing family law practice through relentless dedication to excellence and unwavering commitment to our core values. We're experiencing exceptional growth driven by our mission to transform lives and redefine what's possible in family law throughout the State of Michigan.

Our Vision: We empower people by equipping them with legal knowledge, leveling the legal playing field through exceptional advocacy and negotiation and helping our clients reframe to envision their strongest future.

Our Mission: To revolutionize family law in Michigan through relentless dedication to excellence and unwavering commitment to our core values. We empower families to transform challenges into opportunities for growth and renewal.

What We Offer

Comprehensive Benefits

- Competitive base salary
- Medical, dental, and vision insurance with employer contribution
- 401(k) retirement plan with company matching upon eligibility
- Generous paid time off

Unique Traverse City Advantages

- Join a team in one of Michigan's most beautiful and desirable locations
- Access to year-round outdoor recreation and exceptional quality of life
- Strong work-life balance in a supportive, growing business community

Transform Lives Through Compassionate Client Care

Be the compassionate voice of our law firm, helping families during their most challenging moments. We're seeking a **detail-oriented professional** who excels at gathering critical information while providing empathetic support to potential clients navigating complex legal situations.

The Opportunity: Serve as the vital link between initial client contact and our Client Care Specialists, screening for good-fit cases while ensuring every potential client receives thorough, professional attention.

Key Responsibilities

Initial Client Contact & Prequalification

- Respond to client inquiries
- Screen calls to ensure cases fall within firm scope
- Conduct comprehensive intake interviews with empathy and professionalism
- Gather detailed information about family law matters and assess client readiness
- Identify urgent matters requiring immediate attention

CRM Management & Documentation

- Enter potential new client information accurately into CRM system
- Supervise new client onboarding through data entry and initial paperwork collection
- Maintain detailed records of all client interactions and communications
- Track referral sources and professional contact interactions
- Use customer relations management tools to track interactions

Conflict Checking & Compliance

- Perform conflict checks using specialized conflict checking software
- Verify opposing party information and identify potential conflicts
- Obtain contact information, county of residence, and nature of legal matter
- Maintain strict confidentiality and comply with legal industry requirements

Consultation Coordination

- Schedule consultations between potential clients and Client Care Specialist
- Assist in maintaining the Client Care Specialist's calendar and follow-up schedule
- Prepare detailed intake summaries for seamless handoffs
- Schedule consultations based on specialist availability and geographic coverage
- Follow up on consultations and gather feedback

Client Communication and Follow-Up

- Proactively reach out to clients who have advanced to new stages to maintain momentum and offer support
- Initiate follow-ups with clients who have become inactive to re-establish communication and assess their needs
- Confirm that each client has received the appropriate number of touchpoints and opportunities for engagement prior to being removed from the pipeline

Sales Support

- Assist Client Care Specialist in promptly recording detailed notes from client communications to ensure accurate and timely documentation
- Work closely with Client Care Specialist and Client Success Manager to identify and align on key priorities and action items
- Proactively manage the Client Care Specialist's calendar as needed, including setting reminders and scheduling follow-ups to support efficient time management

Other Duties

- This list of responsibilities is not exhaustive and may evolve in alignment with your skills and career development. As the firm grows and its strategic goals shift, this role will adapt to support departmental effectiveness. You may be asked to contribute to additional legal, administrative, sales, marketing, or other functions as needed.

KPIs

The individual in this role will be accountable for meeting key performance indicators (KPIs) that reflect success in core responsibilities. Regular performance feedback will be provided to ensure alignment with departmental goals and to support ongoing professional development. Targets for each will be discussed at time of hire and will update with firm initiatives and objectives.

- **Initial Response Time**: Average time taken to respond to a new client inquiry.
- **Follow-Up Timeliness:** Percentage of follow-ups completed within the expected timeframe
- **Qualified Lead Rate**: Percentage of leads passed to sales that meet firm qualification criteria
- **Initial Case Assessment Success Rate:** Percentage of qualified leads that proceed to initial case assessment
- **Drop Off Rate:** Percentage of qualified leads who disengage before initial case assessment

QUALIFICATIONS

Experience and Education

Required:

- 2 years customer service or professional services sales experience with phone-based client interactions
- Advanced Microsoft Office proficiency including Excel, Microsoft Word, etc.
- Strong data entry and computer skills with attention to detail
- Professional phone presence with eloquent, empathetic communication
- Emotional resilience and professional composure - ability to provide compassionate support while maintaining healthy professional boundaries during emotionally charged conversations

Preferred:

- Legal industry or family law experience
- Customer relations management system experience
- Multi-line phone system experience

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. 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.
- Lifting and carrying small parcels and packages.
- Standing, walking, and sitting.
- Stooping, kneeling, bending, and crouching (lifting up to 25 pounds).

The firm has a documented dress code policy. As this role interfaces with clients virtually and in person, professional appearance and dress in accordance with company policy is always required.

Travel

Some travel (10%) may be required.

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. Wilson Kester does not discriminate on the basis of and protected characteristic under federal, state or local law.