

Job Title Secretary / Personal Assistant

Job Summary

The role of the Legal Secretary / Personal Assistant is to provide a first-class professional support service to all fee earners. The postholder will be expected to refocus tasks and priorities periodically as required by the fee earners and/or practice area and is expected, on a daily basis, to create a positive working relationship with the fee earner(s) and their peer group.

Main Duties and Responsibilities

Responsibilities and tasks include, but are not limited to, the core areas of support described below:

- Act as a first point of contact and liaison for clients and colleagues, building effective working relationships and acting as gatekeeper for fee earners by answering and screening telephone calls politely and professionally, assisting callers, taking accurate messages and redirecting enquiries to other relevant fee-earners where necessary.
- Detailed and proactive email inbox management including checking and summarising e-mails on a daily basis, bringing urgent messages to the attention of fee earners and using initiative to prioritise and escalate requests and action, draft and transcribe replies in order to answer queries, reduce volume and maximise efficiency whilst providing exceptional client service.
- Type correspondence and documents and prepare and send short holding, covering or similar letters on behalf of fee earners when required.
- Develop and maintain an extensive knowledge of the fee earners' clients, work in progress and projects and be aware of priorities, potential issues and sensitivities. Successfully establish relationships with clients and anticipate their needs.
- Participate in regular work planning with allocated fee earner(s) to review client work activities and requirements and operate an effective bring forward system to ensure self and fee earner(s) meet all deadlines. Immediately clarify instructions from fee earners should they be unclear or if deadlines are not made explicit.
- Assist with client and matter opening and related processes including processing new matter requests, starting electronic filing, applying billing rates, preparing engagement letters.
- Organise and maintain electronic and hard copy document management systems ensuring that all electronic and paper-based files are up to date and maintained at regular intervals and that all closed matters are archived. Carry out health check and "tidy" of documents and standard templates.
- Proactively seek client information/business cards and updates in order to maintain and update client and other relevant contact details on AIM database and Outlook. Manage 'watch lists'

- Manage the diaries of allocated fee earner(s) in Microsoft Outlook to ensure the efficient scheduling of meetings including sending and responding to invitations on behalf of the fee earner, making and rearranging appointments and proactively managing meeting clashes.
- Organise extensive international travel, business trips and itineraries for fee earners including sourcing and booking flights, hotels and transport and preparing door-to-door travel packs (full itinerary, tickets, relevant maps and/or directions, contact numbers, arranging cash, currency, visas). Ensure travel arrangements observe budget.
- Booking client and/or inter-office meetings, arrange conference calls and organise client lunches, dinners, workshops, conferences, seminars and other events including booking restaurants locally and abroad. Book equipment, prepare papers and draft agendas for meetings and take minutes, as required, ensuring accuracy and completeness.
- Work proactively with fee earners to ensure that documentation is produced with speed and accuracy and meets clients' expectations and deadlines including preparation, creation, amendment, formatting, engrossing, printing, pagination, numbering and presentation of a variety of documents in the Firm's house style using track changes, automatic numbering/styles, cross referencing and fixing problem documents.
- Undertake audio and copy typing, photocopying, scanning and faxing of documents and preparation of trial bundles.
- Demonstrate an understanding of, and assist fee earners to coordinate, the end-to-end billing process including running system reports, completing and closing of time-sheets, updating time narratives, ensuring disbursements invoices are authorised and added to the file in preparation for billing, printing of billing guides, production of invoices for fee earner approval and/or amendment and following up unpaid bills.
- Prepare and process relevant finance forms including submission of expense claims, payment requisition forms, returned advances and disbursements ensuring allocation to appropriate budgets. Carry out mobile phone reallocation and reclaim process.
- Support fee earners with priority client and business development initiatives including researching information for and preparing animated or graphical client presentations, papers, reports, pitch documentation, invitations, CVs and other client packs or event materials working with the Firm's in-house Marketing and Business Development function as required.
- Assist fee earners with HR-related administration tasks including accurately recording absence of team members, management of team annual leave requests, maintenance of up-to-date CPD/learning records and provision of administrative support at appraisal time.
- Provide excellent cross-team and cross-departmental support whenever s/he has spare capacity and as required. Ensure that team and departmental telephones are covered at all times and willingly offer assistance and provide cover for absent colleagues. Act as a mentor/buddy to new team members.

- Proof read and undertake quality checks on all work produced, become adept at using the Firm's systems and office equipment and develop familiarity with the legal terminology of the practice area.
- Undertake any other duties that are within the employee's skills and abilities whenever reasonably instructed.

This job description is provided only as a guide to assist the employee in the performance of their job. The Firm is a fast moving organisation and therefore changes in employees' duties may be necessary from time to time. The job description is not intended to be an exhaustive, inflexible or finite list of tasks and may be varied from time to time in the light of changing circumstances after discussion with the postholder.

Person Specification

- Sound intellectual skills evidenced by a strong academic background including formal secretarial qualifications, further training and experience or educated to graduate level. Must hold at least 5 GCSEs (A-C) or equivalent, to include Mathematics and English.
- Solid, recent PA/secretarial experience at partner or director level preferably gained within a professional services environment or partnership.
- Experience of fee/billing management and financial tasks.
- Able to draft, type, format, prepare and produce a wide range of high quality documentation, correspondence, statistical information, graphics, presentations and short reports displaying sound grammar and legal terminology.
- Excellent attention to detail and accuracy.
- Superior organisational, time, project and diary management skills and the proven ability to handle multiple priorities and ad-hoc urgent requests without sacrificing quality or accuracy.
- Able to successfully form, build, develop and maintain positive and effective working relationships with people from a wide range of personal and professional backgrounds.
- Advanced technical skills - accurate audio and copy typing circa 60 + wpm.
- Excellent knowledge of Microsoft Office, particularly Outlook, Word, PowerPoint and Excel and used to working with house-styles and 'problem' documents.
- Demonstrates sensitivity to the requirements of working for senior staff in a partnership environment.
- Confident, proactive and able to act proactively on their own initiative to anticipate fee-earner requirements and ensure that these are met.

- Client orientated with the ability to handle highly confidential information and maintain high levels of confidentiality and discretion at all times.
- Committed to the delivery of the highest levels of customer service.
- Demonstrates an enthusiastic and flexible approach to work and its demands
- Able to work successfully as part of a team.

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