**Job Profile**

**Conveyancing Legal Assistant – Grade 3**

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| **Purpose of role** | **To provide administrative conveyancing support to fee-earners in the Residential Conveyancing Dept.** |

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|  | Grade 3 – KPIs | Proposed tasks within KPIs |
| Technical skills and application | Building on a range of technical, admin or operational skills to effectively carry out role | * Ability to be totally confidentiality and securely manage all company and client documentation and/or information * Core skills to include, but not exclusively:   + Accurate and fast keyboard skills, processing via digital dictation, copy typing.   + Effective diary management skills for fee-earners   + Effective organisational and administrative skills   + Task flow (training to be given)   + HMRC website (training to be given)   + SDLT website (training to be given)   + Lawyer Checker website (training to be given)   + HTB ISA website (training to be given)   + STARS (training to be given)   + NHBC website (training to be given) * IT skills (word, excel, outlook and Company OMS systems) |
| Decision making and problem solving | Ability to identify day to day issues and takes the initiative to find solutions | * Day to day responsibility for all tasks to include taking the initiative to find solutions to issues before escalating up to fee-earners for approval. |
| Delivering quality/customer service (internal and external) | Can identify any issues with client service and makes suggestions for improvement | * Open files - Make initial calls to clients prior to file opening to obtain any missing information required to open files and to explain communications procedure (who to contact etc.) * Processing client questionnaires contacting clients if necessary to ensure that all required information is entered on to system. * Awareness of any job creep and notify fee earner. * Identifying where existing processes can be improved and escalating up to the Department Manager for approval prior to implementation. * Ensure that requests for wills, financial services or surveyor recommendations are brought to the attention of the Fee Earners |
| Communication | Demonstrates the ability to motivate others, both internally and externally, through effective communication. | * Efficient and effective in dealing with existing clients on the phone and in person * Dealing courteously with third parties to ensure no problems arise |
| Effective management of work/ organisation | Pro-actively ensures that own and/or team workloads are manageable and delegates appropriately to ensure team needs are met. | * Liaises with fee-earners to ensure all tasks done in order of priority referring to the Dept. Manager if any issues arise * File administration (opening, filleting and closing) * Photocopying and scanning including all ID and proof of address documentation * Check/claim/chase monies due from clients throughout transaction * Prepare e-chits for receipt of such monies/funds/mortgage advances |
| Team working | Actively participates and encourages others to work as part of the team and to achieve objectives set | * Manages own time for maximum benefit to the team. * Pro-actively engage in any learning and development activities that will further the performance of the team |
| Complexity | Ability to cope with a varied workload, consisting of a number of different elements which are broadly related to one another and exercising a variety of skills | **In relation to purchase of properties**   * Carrying out initial searches and download results and reference each individual search separately by name on OMS * Interim billing of search pack upon receipt of all search results * Where appropriate to experience and matter type raising enquiries and prepare, compile and bind up reports on title and send out with supporting documentation (draft SDLT/Contract, FS etc.) for signature by client * Perform Lawyer Checker searches pre-exchange and pre-completion and report **all** results to fee earner immediately * Send out report on mortgage with mortgage deed for signature * Exchange contracts (if authorised to do so by fee earner with responsibility) * Deal with all post exchange formalities * Prepare files for completion (prepare straightforward TR1’s, reply to requisitions, prepare and submit Certificate on Title, prepare draft financial statements prepare e-chits for signature, * Deal with completion formalities * Complete post completion registration or prepare file to pass to post completions assistant   I**n relation to sale of properties**   * Prepare contract pack * Write to lender for initial redemption figures * Send out contracts to clients for signature prior to exchange * Where appropriate to experience and matter type take clients instructions and reply to enquiries * Exchange contracts (if authorised to do so by fee earner with responsibility) * Deal with all post exchange formalities * Prepare files for completion (submit TR1 to client for signature, raise requisitions, obtain final redemption figure, prepare draft financial statements, prepare e-chits for signature) * Deal with completion formalities |
| Effort and Commitment | Input influences team objectives being met | * Appropriate understanding of and ability to work within all Company’s policies and procedures required for the role at grade 3 level. |