

# Baker McKenzie.

## POSITION DESCRIPTION

### New Business Intake Coordinator

<b>Position Title</b>	New Business Intake Coordinator
<b>Department</b>	New Business Intake (NBI)
<b>Position Type</b>	Full Time - Permanent

#### Role and Department Summary

We are looking for a Business Intake Coordinator to join our highly-regarded team at Baker McKenzie, Belfast. The Business Intake Coordinator will assist in providing an efficient and effective service to Firm Partners and Offices and reducing overall exposure to risk by reviewing Outside Counsel Guidelines sent by clients to ensure compliance with the Firm's Standard Terms of Engagement. In addition to this, the Business Intake Coordinator will also be reviewing and opening new and existing client registrations and matters.

New Business Intake (NBI) is responsible for the Firm's business intake process, that is the registration of incoming New Clients and New Matters across all Offices globally. The department assists Partners in complying with ethical and legal duties to avoid conflicts of interest and in meeting professional responsibility obligations. These objectives are accomplished through review of New Client and New Matter information submitted via the Firm's business intake system where the team;

- i) assists in identifying possible conflicts of interest;
- ii) ensures that clients accepted are appropriate for the Firm;
- iii) verifies that our Standard Terms of Engagement are in place with the client;
- iv) ensures compliance with Firm policies and procedures; and
- v) confirms that all client/matter information recorded in the Firm's central records is accurate.

The New Business Intake Coordinator will review outside Counsel Guidelines received directly from clients, Partners, E-Billing Implementation and escalations from the Firm's business intake system. Guidelines will be reviewed to ensure they do not deviate from our Standard Terms of Engagement unless approved by EC Subcommittee. Where there are inconsistencies, provide analysis to Deputy General Counsel or directly to Partners or the Director of Professional Responsibility.

Conflict management support is provided through running additional conflict checks on all parties involved in new matters upon registration, and coordinating with Partners and Offices to ensure proper conflict clearance documentation is attached to the record when possible conflicts have been identified. Due diligence research is undertaken on prospective clients and related parties to ensure client quality and integrity, and to comply with Anti-Money Laundering (AML) regulations. Various screening resources are utilised by the team in addition to conducting extensive internet searches.

#### The Firm

Baker McKenzie is a truly global law firm. We have more offices in more locations than any other law firm and most of our work has an international dimension. With 13,000 people in 47 countries, few other firms can claim to be so multi-national.

And, because we have no global head office, at the local level we can offer you the best of both worlds: the work, pride and experience of being part of one of the world's leading law firms but in a local office environment that is friendly and supportive. No matter what the role or level, our strategy is to encourage and support every Baker McKenzie person to fulfil their potential.

Our Belfast office is a centre of excellence and focuses on providing high quality legal services to the Firm's clients around the world, and business and administrative services to our many offices and

practice groups.

### **Responsibilities**

With support from New Business Intake team members and Management:

- Provide all aspects of support to the Firm, its Partners and Offices with regard to all tasks encompassing the business intake process;
- Process Maintenance Forms submitted via IntappOpen;
- Assist and review all information submitted on New Business Intake Reports (NBIR) for accuracy and completeness, namely ensuring; all required fields are populated, information provided is accurate and appropriate supporting documentation has been attached;
- Make sound and educated decisions regarding the existence and validity of possible conflicts of interest and clearance of identified conflicts of interest through liaison with Firm Partners and Offices;
- Review Engagement or Assignment Letters for compliance with Firm and departmental guidelines and policies;
- Ensure Standard Terms of Engagement are applied to all client engagements and, where applicable, ensure exceptions to Standard Terms of Engagement are tracked and recorded accordingly;
- Conduct online investigation of prospective clients using online databases (such as Pacer, Lexis Nexis, etc.), business intelligence databases (D&B, Hoovers), Government Watch Lists (World-Check) and the Internet (Google). This research facilitates the identification of high risk and negative findings, which must be communicated to NBI Management and Risk Management.
- Engage and collaborate with team members through the presentation of ideas and recommendations regarding best practice, continuous improvement, departmental processes, policies and procedures;
- Provide support and assistance on important team projects and initiatives, when required.
- Review and Analyse Client Outside Counsel Guidelines to ensure they are consistent with our Standard Terms of Engagement, as well as Firm Policy. Where there are inconsistencies, provide analysis to Deputy General Counsel or in some cases directly to Partners or the Director of Professional Responsibility.

### **Job Holder Requirements**

#### **Essential Criteria:**

- Law graduate (2:1 or above) or a post-graduate qualification in law
- Strong attention to detail - gets it right first time.
- Excellent working knowledge of Microsoft PowerPoint, Word, Excel and online research tools.

#### **Technical and Personal Skills:**

- Ability to make effective, accurate decisions, judgment calls and reliable recommendations with support from team members and Management, where necessary;
- Professionalism and the ability to influence in a positive manner;
- Excellent interpersonal skills with a positive customer service oriented attitude;
- Ability to engage and collaborate with team members locally and across other Global Services locations;
- Excellent time management and organizational skills, with the ability to work well under pressure, manage workloads, meet deadlines and prioritise efficiently;
- Ability to leverage consultant resources and utilize information appropriately;
- Exceptional problem solving, critical thinking, and analytical skills;
- Excellent written and oral communication skills demonstrated in interactions with all colleagues throughout the Firm as well as Partners and Management;
- Positivity and the adoption of a solution-based approach in all aspects of work.
- Ability to piece together information from several different sources, some of which can be historical and unclear, into a 'one stop' report for Partners and the Office of General Counsel.

*Baker McKenzie Belfast is committed to promoting diversity and inclusion for all. This is intrinsic to everything we do and underpins Baker McKenzie's vision to be the premier global law firm. This vision cannot be achieved without harnessing the imagination and the creative problem-solving capability of talented people whatever their background. Our unique international culture is reflected in the drawing together of a worldwide family of individuals from diverse cultures and backgrounds in all of our offices.*

*The Belfast office mirrors the wider firm in encouraging the best people, regardless of race, religion or belief if any, gender, gender identity, disability, sexual orientation or age, to fulfil their professional aspirations with us so as to create an exciting and diverse legal environment.*