

Intake & Marketing Assistant

Location: Old Milton Parkway, Alpharetta GA 30005

Hours: 8am-5pm M-F (full time position)

Salary: \$15-18 per hour

Required Qualifications:

- High School Diploma
- Customer Service Experience
- Ability to build rapport with employees, clients, and able work within a team
- Excellent written and verbal communication skills
- Ability to prioritize and multi-task
- Detail oriented and extremely organized
- Experience with Email and Calendaring Platforms, Word, Excel, Adobe Acrobat, PowerPoint

Preferred Skills and Characteristics:

- Experience in the Legal Industry
- Experience in Sales
- Experience with CRMs, PPC, SEO, Social Media Marketing
- Bachelor's Degree

Responsibilities:

The Intake & Marketing Assistant is responsible with assisting the Senior Intake/Marketing Specialist & Assistant Director of Operations in charge of sales of the firm's services by converting leads to clients. They are responsible for following the lead-prospect-client process and educating the potential client of the firm's services and mission. They are clear on the definition of a good/bad lead, good/bad referral source and clear on the definition of an "A" client versus an "F" client.

The Intake & Marketing Assistant also strives to implement marketing strategies that attract "A" clients and good referral sources; researches the market/industry and is aware of new and innovative ways to market/brand/extend our vision to more potential prospects and referral sources; as well as looks for opportunities for the firm to reach a broader audience by attending expos, setting up presentations and fairs, etc.

- a) Serves as the second line of communication to a prospect and is expected to represent the company's mission
- b) Responsible for contacting leads and converting them to clients

- c) Input all information gathered from the Intake Screening Process into InfusionSoft and initiating appropriate processes
- d) Complete, manage and update tasks in our CRM for leads
- e) Prepare new client intake folders for consultations
- f) Perform conflict checks
- g) Send out new client gifts
- h) Client check-in calls
- i) Manages social media with meaningful content and schedules same; Ensures website content is being reviewed timely and stays fresh
- j) Manage firm's Facebook lives
- k) Drafts, designs, and creates the monthly physical and digital newsletter and sends it out on a monthly basis
- l) Schedule content interviews for the firm's Managing Partner
- m) Maintains the constant contact list on a monthly basis with new referral sources, prospects, clients, etc.
- n) Attend networking events; Helps build relations between the firm and the community/referral sources/networks/ community resources/etc.; Manages relations with referral sources through various means
- o) Manage Concierge Partner list
- p) Manage Client and Employee Happiness budgets
- q) Assist Senior Intake & Marketing Specialist with multiple firm events
- r) Provides backup to the receptionist on the phones