

## New Business Intake Clerk

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### Position Overview:

The New Business Intake (NBI) Team is responsible for the timely, efficient, and accurate opening of all new client and matter files. NBI creates and maintains client records, conflict databases, conflict screens, and ethical walls. In addition, the NBI Team conducts staff training on the file opening and conflict searching processes and functions as the primary point of contact for staff and lawyers for support with these processes.

This is a detail-oriented position with a focus on time management skills, attention to detail, and client service. This position could be based in either our Calgary or Edmonton office.

### Key Responsibilities:

#### New Business Intake/Client Records

- Receive, review and process requests for new client/matter file openings and reopening of previously closed files
- Review submitted conflict searches for completeness and accuracy, identifying potential issues and escalating to Conflicts Committee as required
- Verify completeness of client and matter information provided for compliance with law society and Firm guidelines
- Monitor client records system for irregularities or inefficiencies. Review the system for stalled requests, troubleshoot and correct user errors and reports system issues ensure content integrity
- Maintain and update client records as required

#### Ethical Walls/Conflict Screens

- Create and maintain all ethical walls and conflict screens in Intapp
- Maintain conflict database to ensure it is complete, accurate and up-to-date
- Liaise with Conflicts Committee where appropriate to ensure any potential conflict issues are identified and documented

#### Training/Best Practice

- Assist in the development and documentation of procedures and policies governing the Firm's new business intake and conflict management activities and responsibilities
- Educate and provide guidance to Firm members regarding the policies and procedures of new business intake and conflict management activities
- Identify and/or participate in the evaluation of tools to enhance best practices and test new products and software
- Liaise with other internal service groups where required
- Other related administrative, clerical, technical, and other duties as required

## New Business Intake Clerk Continued

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### **Our Ideal Candidate:**

- Possesses excellent communication skills, both written and verbal
- Demonstrates a commitment to quality and exceptional client service
- Exceptional interpersonal skills so as to interact/collaborate successfully with various groups
- Demonstrates a commitment to continuous improvement, flexible approach, promoting quality
- Has a proven track record demonstrating problem-solving and analytical skills
- Maintains professionalism and absolute confidentiality of Firm and client information

### **Key Qualifications and Experience:**

- Extensive experience with MSOffice is required
- Working knowledge of accounting and database software such as 3E/Elite, Aderant, Intapp or alike is preferred
- Experience in the legal field is preferred but not required

### **What you will find at McLennan Ross:**

- A highly professional environment that is built on a strong culture and spirit of teamwork
- The opportunity to continue to develop litigation and advocacy skills, among a highly skilled team of litigators, in a mentoring environment
- Proven high quality of service and commitment to our clients and each other
- Competitive compensation and benefits package

### **Career Package:**

We offer a challenging and progressive work environment together with an excellent and competitive salary/benefits package commensurate with qualifications and experience.

Qualified and talented candidates may submit their resume via email and include a cover letter to include some career highlights that demonstrate a strong fit to our requirements to:

McLennan Ross, Human Resources  
Suite 1900 Eau Claire Tower  
600 3<sup>rd</sup> Ave SW Calgary, AB, T2P 0G5  
E-mail: CalgaryHR@mross.com

## New Business Intake Clerk Continued

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### **About McLennan Ross:**

At McLennan Ross, you will find a community of people who are passionate about the work we do and who genuinely value and support one another. While we foster a team approach, we also value the diverse contributions and individuality of all our members.

With a shared commitment to excellence, we make a national impact through our work with clients across Canada. Our lawyers have been involved in numerous landmark cases, at all levels of the Canadian judicial system, including the Supreme Court of Canada. Many of our cases have profoundly affected the legal framework in which many businesses operate today.

Our open-door policy means you will benefit from a strong support base. It is our deep-seated belief that through continuous collaboration, we are not only providing our clients with the best possible service, we are cultivating an environment where everyone has the opportunity to learn and grow.

As a firm, we are defined by our values. They drive us. They inspire us. They inform everything we do.

### **Our Values:**

#### 1. Unrivaled Client Focus

Our client experience is second to none. We strive for excellence in Law and are always looking for creative, practical solutions to get the best results for our clients and the firm.

#### 2. Passionate and driven

We're all in! We are passionate about the work we do and are driven by results.

#### 3. Genuine and approachable

We are unpretentious and no one calls us stuffy. We welcome diversity and know that we are better together.

#### 4. Make a difference

We care about our clients, our community and each other and we want to make a difference in the lives of those around us.

Visit us online at [mross.com](http://mross.com).