



## **Director of Client Experience and Community Outreach**

O'Donnell Law Center is a growing boutique law firm located in Osage Beach, Mo. We are dedicated to providing the highest quality Estate Planning Services to our clients. While we are an extremely busy office, we enjoy a relaxed and warm atmosphere which sets us apart from the larger firms.

We are looking for someone who is smart, motivated, has the ability to work under pressure and the desire to contribute to the experience of our clients as well as the success of the practice. This person will join our firm as the Director of Client Experience and Community Outreach.

The successful candidate will have exceptional interpersonal skills, and the ability to interact skillfully and courteously with a variety of individuals. They will also possess excellent organizational skills, the ability to think and communicate logically, work independently, and make sound judgements.

**If this sounds like you, please submit your resume and a cover letter to Sue at Kmet HR Consulting, [sue@kmethrconsulting.com](mailto:sue@kmethrconsulting.com).**

### **JOB PURPOSE**

This position works directly with the Director of Estate Planning Services, clients and other team members to manage the clients' Estate Planning experience.

The Director of Client Experience and Community Outreach will be directly involved with the client experience from the initial client meeting through the delivery of their final Estate Plan, and beyond. In addition, the Director of Client Experience and Community Outreach will assist with the coordination of the Firm's public relations and special event planning.

This role will focus on providing the highest quality services to all O'Donnell Law Center clients.

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### **ESSENTIAL DUTIES AND RESPONSIBILITIES**

- Facilitate, execute, and control all aspects of the client document signing ceremony, including notarizing all appropriate documents.
- Greet clients in office for attorney appointments and document drops.
- Close client matter and ensure open line of communication for future client support.
- Finalize client conversion including execution of engagement letter and collection of engagement fees.
- Manage all aspects of the client Estate Planning experience.

- Develop, coordinate, and implement community-based marketing strategy to include workshops, seminars, special events, and community involvement.
- Analyze results from each campaign to determine what was successful and what to improve for the next campaign.
- Lead brainstorming sessions with team members to cultivate ideas for new advertising campaign concepts, including content and design elements.
- Analyze target market information to identify and recommend effective community-based marketing approaches.
- Responsible for seminar and Every Direct Document Mail (EDDM) related activities: mailers, coordination with conference center space and food, sound guy etc. Also attending all seminar with attorneys.
- Using our automated systems and personal touch. Manage all leads generated at seminars, workshops, and events with goal of having them schedule a quick call or Family Wealth Session.
- Develops and implements periodic small, intimate public or client related events at the office.
- Works closely with our Marketing Director and our Director of Social Media and Digital Marketing to market planned events.
- Create and implement procedures for collecting monitoring and team reporting on outreach stats
- Identify, coordinate and schedule attorney's local community networking calendars, as well as attend events with attorney.
- Prepare office space and technology for attorney and client meetings.
- Notarize legal documents as necessary.
- Organizes, decorates, and maintains office and office décor.
- Participate in all office meetings, training, and education.

### **ADDITIONAL DUTIES AND RESPONSIBILITIES**

- Remain current of latest improvements in hardware and software that would be beneficial to the practice.
- Inventories, orders, receives, and stocks all office supplies.
- Performs any other related duties as assigned.

### **QUALIFICATIONS**

- BA/BS degree preferred or any combination of experience and training which provides the necessary knowledge, skills, and abilities.
- Thorough knowledge of office administration functions and responsibilities
- Ability to identify and analyze complex issues or problems to recommend and implement solutions.
- Exceptional interpersonal skills; able to interact skillfully and courteously with co-workers, attorneys, clients, and the public.
- Strong written and verbal communication skills.
- Possess exceptional organizational skills.
- Strong computer skills with proficiency in Microsoft Office 365 and the ability to master new software programs.
- Basic understanding of trusts, wills, power of attorneys, and health care documents.

- Work occasionally requires a high level of mental effort and flexibility. Must be able to perform the duties of the position with time constraints and interruptions while under pressure.
- Ability to handle difficult situations and maintain important deadlines and schedules.
- Ability to think logically and follow written, verbal, or diagrammatic instructions.
- Ability to make appointments, process correspondence, compose original correspondence, and have substantial contact with clients.
- Ability to appropriately address issues involving confidential information.
- Considerable knowledge of modern office procedures and practices; ability to operate computer hardware and software in an efficient and effective manner.
- Ability to work independently and make sound decisions.

O'Donnell Law Center offers a comfortable work environment, business casual dress code and a total compensation package that includes a competitive salary and generous paid time off.

O'Donnell Law Center is an Equal Opportunity Employer. Our success depends heavily on the effective utilization of qualified people, regardless of their race, ancestry, religion, color, sex, age, national origin, sexual orientation, gender identity and/or expression, disability, veteran's status, or any characteristic protected by law. As a firm, we adhere to and promote equal employment opportunity for all.