



About Lateam Partners

Lateam Partners is a premier recruitment agency specializing in hiring top **English-speaking** talent in **Latin America** for U.S.-based companies. We connect skilled professionals with dynamic opportunities, offering competitive salaries, career growth, and the chance to work with leading international businesses.

By joining Lateam Partners, you gain access to **exciting remote roles, a supportive work culture, and ongoing professional development**. We pride ourselves on matching top-tier talent with high-quality employers, ensuring a rewarding experience for both candidates and clients.

If you're looking to advance your career with **a stable, well-paid, and growth-oriented opportunity**, apply today and become part of our thriving network!

www.lateampartners.com

Job Title

Intake Specialist

Location

Remote

Client

Undisclosed

Responsibilities

Client Relationship Focused Tasks

- Maintain a high level of customer service when interacting with clients. Ensure a positive client experience and represent the firm's values at all times.
- Collect necessary information from potential clients to assess their legal needs.
- Make referrals to callers looking for assistance outside our practice areas.
- Active and consistent follow-up with potential clients who expressed interest but did not immediately retain the firm's services.
- Take and deliver messages for team members as appropriate.
- Work as a backup for reception and other administration, as required.
- Make introductory calls to clients on behalf of the firm and send welcoming emails.
- Serve as the primary point of contact during the pre-engagement process, answering questions and keeping clients updated.
- Alert supervisor to potential conflicts of interest identified during the intake process.

Administrative Tasks

- Accurately record and maintain detailed client information, including appointments and case details.
- Send questionnaires for case information to new clients.
- Open cases to initiate the legal process.
- Log all calls in the Lead Tracking Chart and CRM.
- Prepare and send accurate consultation invoices and track payments.
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- Schedule appointments between prospective clients and the sales team.
- Reserve the conference room for in-person meetings.
- Help build and regularly review the intake process and suggest improvements.
- Prepare and present regular reports on intake activities.
- Attend regular team meetings and participate in ongoing training opportunities.

Qualifications

- High School Diploma or equivalent.
- Bilingual (Spanish) preferred.
- Previously held a role as an intake specialist at a law firm.
- Proficient with business phone systems, office computer systems, and CRMs.

Apply to this position

<https://forms.monday.com/forms/6f43e441a98a43154090ba9322b9091d?r=use1>