Krause Estate Planning & Elder Law Center is looking for a dynamic and driven sales professional to fill the role of Client Services & Sales Specialist (Non-Attorney Salesperson). This unique position blends sales and client services, ensuring a seamless experience for our clients from initial engagement to post-service follow-up. If you excel at building relationships, guiding clients through structured processes, and driving business growth, we'd love to hear from you!

Please note, this is an office-based role that will work in and travel between our offices in Brookfield, Madison, and Oregon, WI.

JOB SUMMARY:

The role of Client Services & Sales Specialist is comprised of two key positions: Client Services and Salesperson. The Client Services position focuses on managing the client experience, ensuring a smooth pre-engagement glidepath, seamless onboarding, and successful post-engagement transitions. Meanwhile, the Salesperson is responsible for driving business growth by conducting initial sales conversations and initiating new client engagements. Together, these roles create a powerful synergy, guiding clients from first contact through a well-structured engagement process.

KEY RESPONSIBILITIES:

Client Services Duties

- Ensure all PNCs receive pre-conditioning materials as defined in the pre-engagement glidepath
- Enter new clients in law firm case management system and communicate to appropriate parties within the firm to start a new case
- Create files for new clients or past clients with new cases
- 1st follow-up: Follow up with clients 5 days after being hired and verify that the client has been successfully engaged
- 2nd follow-up: (Flat Fee cases) Follow up with clients 15 days after being hired to ensure they are receiving great client support and answer any of their current concerns. (Hourly cases) Reach out to clients at 10 days (or close in time prior to the first bill) to explain what will be on the bill, confirm the evergreen policy, to ensure they are receiving great client support and answer any of their current concerns
- Contact clients at 10, 30 and 270 days after their case closed to keep the relationship fresh
- Track and maintain metrics for the Owner re: conversions of leads to PNC, referral sources, cost of acquisition, and other key performance indicators

Salesperson Duties

- Conduct sales meetings with appropriate and desirable prospective new clients (PNCs) to sell legal services
- Create contract and accept payment and interact with law firm attorney for acceptance of contract
- Follow up with those PNCs who did not hire the firm during their initial sales conversation
- Follow up with PNCs for all past electronic and mailed contracts which have not been signed and paid on
- Track and maintain metrics for the Owner re: conversions of PNC to Client, referral sources, and other key performance indicators

REQUIRED QUALITIES, SKILLS, AND EXPERIENCE:

- Candidates must have proven experience in sales, particularly in selling high-value or luxury items
- Embodiment of our Core Values of Love, Compassion, Integrity, Teamwork and Constant Improvement
- Friendly and outgoing
- Discreet; able to maintain confidentiality
- Desire to help others and create something significant
- Exceptional communication skills; convey confidence in person and on the phone
- Integrity and professionalism
- Organized and detail-oriented
- Able to gain a deep understanding of our services and determine the best plan for the new client based on their specific needs
- Able to communicate calmly and clearly with stressed clients and potential new clients
- Common sense
- Self-starter, resourceful, compassionate, responsive, and adaptable
- Willing to contribute ideas for constant improvement of our systems
- Mastery of Windows 10/11, Microsoft 365, Adobe Acrobat

COMPENSATION AND BENEFITS:

- This position offers a base salary of $20,000 plus quarterly bonuses and performance incentives; total compensation is based on success but is estimated to be between $40,000-$77,500 annually
- Medical, Dental, and Vision Options
- Disability/Critical Illness Insurance Options
- 401(k)
- Flexible Spending Account
- Employee Assistance Program
- Pre-Paid Legal

- Identity Theft Protection
- Pet Insurance

WORK ENVIRONMENT:

- This is an office-based role that will work in and travel between our offices in Brookfield, Madison, and Oregon, WI.

ABOUT US AND MORE!

We are a law firm dedicated to providing our clients with the best-damned estate planning, elder law, and probate services possible. We do this by living by our five Core Principles of: Love, Compassion, Integrity, Teamwork, and Constant Improvement.

Our founder, a retired Army JAG officer, leads this small but quickly growing boutique practice. We want members on our team who are fierce, strong, and compassionate as well as ethical, professional, and trustworthy. You must be committed to excellence, helping others, and want to be a part of something extraordinary.

We are on a fast growth trajectory. This is an opportunity to join a top team and work with the best as we expand into other states. We are looking for someone to join our team and grow personally and professionally with us!

Our purpose is to be a steadfast family friend to our clients. We do this through Estate Planning, Elder Law, and Estate Administration services and advice. We help Elders and their loving families to protect their life savings in the face of the devastating costs of nursing care.

You will be investing yourself to grow a firm and create a culture that will break the mold and change people's lives. You believe that "good enough" sucks; push harder and achieve more!

You must understand and embody our Core Principles. We want referrals from clients who become raving fans, not repeat business from miserable ones. We want to deliver an experience that is above and beyond the norm. We want you to be so awesome that you have a cult of raving fan clients.

You are someone who loves older adults and is responsible, friendly, outgoing, and discreet. You see the glass half full. We have no place for toxic people and workplace drama. Our team is outstanding and does amazing work. We communicate all the time and openly. We acknowledge our mistakes and apologize when we have affected others negatively.

We are looking for someone who is not afraid of Windows computers. This will be your working environment, and we do not allow work on personal computing devices.

You need to be able to talk to clients and staff in a manner that is confident, kind, and candid. Because we deal with folks of advanced age and varying education levels, you must have patience and be compassionate. While it is important to show that you care about our clients, it is more important to actually care about them.

HOW TO APPLY:

Please submit your resume to akkeanconsulting@gmail.com. If you are shortlisted for prescreening, you will be contacted with further details shortly.

KRAUSE ESTATE PLANNING
& Elder Law Center

116 Spring St
Oregon, WI 53575
608-268-5751