

WBL Logbook Sheet Template

Learning Outcome and example number e.g. 1.1(1), 1.2(2), 1.2(1) 1.2(2) etc.	Page numbers from portfolio
3.2(2): Take accurate instructions relating to a legal matter from clients or service users	77-82
Evidence provided and date of evidence e.g. Letter to client dated 01.01.2020 Telephone attendance note dated 01.01.2020	
Attendance note dated 15.06.2021 Email trail with client dated 15.06.2021 Letter to tenant with draft licence dated 15.06.2021	
Explain how the example meets the learning Outcome and how the evidence shows this	
<p>Use appropriate listening and questioning techniques and take accurate instructions from your client In this case I was dealing with a licence for alterations. The client had sent written instructions for the licence however the details of the proposed alterations were very vague. I then set up a telephone meeting with my client for them to provide more details so that I could draft the licence.</p> <p>Confirm with your client that your understanding of the instructions is correct Following our meeting I drafted the licence and sent it to the client for approval. The client emailed me back stating that they were happy with the draft, thus confirming that I understood their instructions. The client also instructed that the draft licence was now sent to the tenant for approval.</p> <p>Provide evidence of both taking the instructions and confirming the instructions with your client The attendance note is evidence of me taking instructions from the client as to the contents of the licence. The email trail with the client is evidence that I have understood and confirmed the instructions by drafting the licence with the correct details. The letter to the tenant with the draft licence shows be further carrying out the clients instructions by sending the draft for approval by the tenant.</p>	
Reflection and evaluation Describe what you learnt from the activity you undertook to meet the Learning Outcome. You may want to complete this section at a later date once you have had time to reflect on your practice and experience.	
It is vital to take the clients instructions to be able to accurately draft legal documents. As these documents are legally binding it is extremely important that the contents are accurate and to the client's requirements.	
Supervisor's Name	

<p>Please print the full name of the supervisor that supervised the work referred to above within this logbook sheet and the supporting evidence.</p>	<p>[Redacted]</p>
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**CORPORATE LEGAL SERVICES
FILE ATTENDANCE NOTE**

Attendance type: Tel Meeting

Fee Earner: [REDACTED]

Date: 15/06/2021

Case No./Description [REDACTED]

Time: 11:36am

Duration of attendance:

14 mins

Attendance with (name/s): [REDACTED] - client

Details:

Called client to confirm the details of the instructions. There were no details of the alterations in the written instructions.

[REDACTED] - confirmed that the alteration is for a single storey rear extension to existing retail shop.

[REDACTED] - sent me the drawing of the alteration whilst we were having the meeting.

I told [REDACTED] that I will finalise the draft licence and send this to her for approval before sending to the other side.

Subject: FW: File opened: [redacted] Licence for Alterations [redacted]
Attachments: Single storey rear extension plan.pdf; Draft Licence for Alterations.doc

From: [redacted]
Sent: 15 June 2021 12:23
To: [redacted]
Subject: RE: File opened: [redacted] Licence for Alterations [redacted]

Hi [redacted], thank you for approving the draft. I will now send this to the other side for approval. I will be in touch when there is any progress.

Kind regards,

[redacted]

From: [redacted]
Sent: 15 June 2021 12:06
To: [redacted]
Subject: RE: File opened: [redacted] / Licence for Alterations [redacted]

Good morning [redacted]

Thank you for the attached, I confirm that I am happy with the draft licence and the details of the alterations. Please send this to the other side.

Stay safe and stay well.

Regards,

[redacted]



From: [REDACTED]
Sent: 14 June 2021 16:28
To: [REDACTED]
Subject: RE: File opened: [REDACTED] Licence for Alterations / [REDACTED]

Hi [REDACTED],

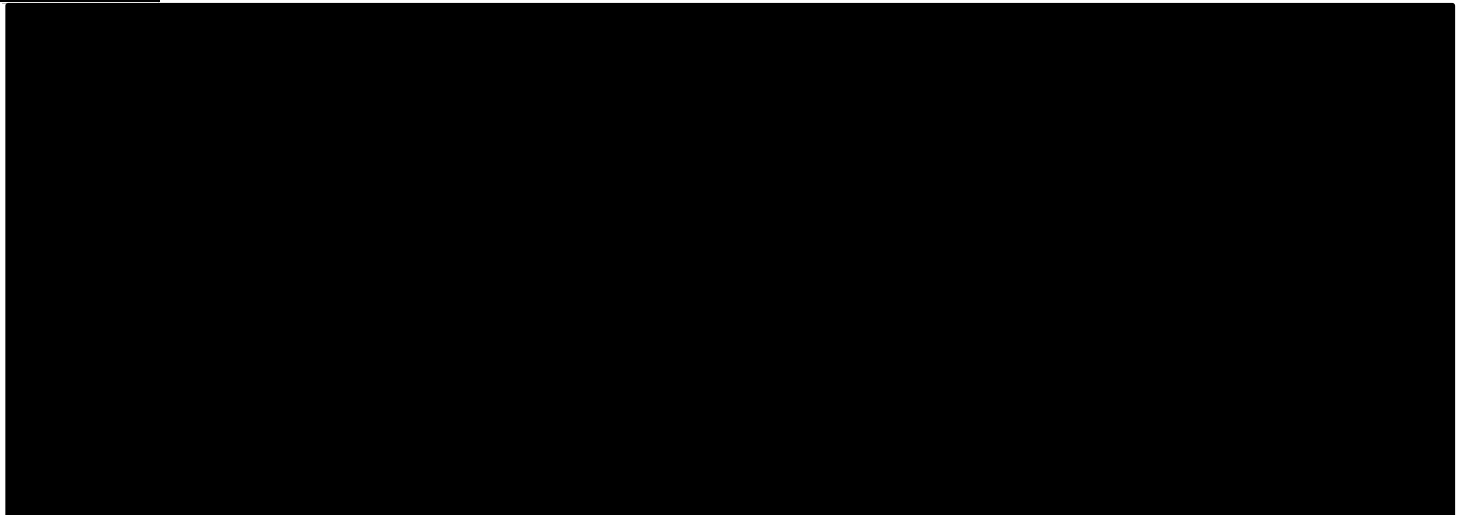
Further to our telephone meeting this morning regarding the above I now attach the draft licence for your approval (and the drawing/plan to be included). Please in particular see the details of the alteration at the end of the document and confirm these are your instructions.

I look forward to hearing from you.

Many thanks.

Kind regards,

[REDACTED]



[Redacted]

[Redacted]

[Redacted]

By recorded delivery

Date: 15th June 2021

Your ref:

Our ref:

Direct dial:

Email:

[Redacted]

Dear Ms [Redacted]

Re : Licence for Alterations re 3 [Redacted]

I act for [Redacted] and have received instructions from my client department (Strategic Property) in connection with the matter above.

Enclosed is a draft Licence for Alterations for your approval. If you intend to propose changes to the Licence please be aware that this is the Council's standard document and only minor changes will be accepted.

Please do not sign the draft licence. When you confirm you are happy with this draft I will arrange for an engrossed and bound version to be sent to you for signature.

I look forward to hearing from you in due course.

Yours sincerely,

[Redacted]

[Redacted]