

WBL Logbook Sheet Template

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Learning Outcome and example number e.g. 1.1(1), 1.2(2), 1.2(1) 1.2(2) etc.	Page numbers from portfolio
Learning Outcome 3.6 – Example 1 – Manage a client or service user's expectations	29
Evidence provided and date of evidence e.g. Letter to client dated 01.01.2020 Telephone attendance note dated 01.01.2020	
Email to client dated 21st September 2022.	
Explain how the example meets the learning Outcome and how the evidence shows this	
<p>Identify needs/objectives of client: In this case, I had been instructed to act on behalf of a purchaser who informed me that she wished to complete matters within two weeks.</p> <p>Identify situations in which the objectives of your client may be unrealistic: As the client was purchasing with the aid of a mortgage, I explained to the client that the two-week timeframe to complete was not realistic as we would need to wait for the Mortgage Offer to be issued and reviewed before we could complete. I further explained to the client that we would need to request the property searches which normally take around 3-4 weeks to return. This, in addition to the fact that we still awaited the draft Contract pack which would need to be fully reviewed and enquiries would likely be raised, meant that the two-week deadline to complete was not achievable.</p> <p>Reasonable steps to manage expectations: I advised the client immediately that their proposed completion date would not be achievable so that I could manage their expectations right from the outset. I clearly set out the reasons why this would not be achievable to our client in an email so that they could fully understand why the transaction would be unable to complete by that time.</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.	
From this experience, I understand the importance of managing the client's expectations from the outset of the transaction to avoid any issues in the future. Though I am happy to use my best endeavours to complete matters as quickly as possible for my clients so that they may meet their desired timescales, this is not always possible, and the client must always be advised accordingly if not.	

Supervisor's Name

Please print the full name of the supervisor that supervised the work referred to above within this logbook sheet and the supporting evidence.



[REDACTED]
1 message

[REDACTED]
21st September 2022 at
14:52

Good afternoon,

Thank you for your recent email.

Though I appreciate that you wish to complete this matter as expeditiously as possible, please kindly note that it will not be possible to complete the matter within the next two weeks.

This is due to a number of reasons. Firstly, we note that you are purchasing the property with the aid of mortgage finance and your Mortgage Offer has not been issued just yet. Please note that once we are in receipt of the Offer, this would need to be reviewed in full before we are able to discuss any completion dates.

Please also kindly note that as our file has only recently been opened, we are yet to request the property searches and these normally take around 3-4 weeks to return. Please note that as you are purchasing with the aid of a mortgage, we will not be in a position to complete until we are in receipt of satisfactory search results.

Whilst writing, we also note that we still await the draft Contract documentation from the seller's solicitor and once received, the paperwork will need to be reviewed in full and it is likely that we will need to raise a number of enquiries with the seller's solicitor following our review of the same.

Taking the above into consideration, please note a completion date within the next two weeks is not achievable. Please be assured though, that we will deal with your purchase transaction expeditiously as possible and will keep you fully updated throughout the course of the transaction.

As soon as we are in a position to confirm the completion date, we will let you know.

Should you have any queries regarding the above, please do not hesitate to contact us.

Kind regards,
[REDACTED]



On Wed, 21 Sept 2022 at 09:44, [REDACTED] <[REDACTED]> wrote:

Hi [REDACTED],

I have received your letter and will send you the required information by the end of the week. I am just waiting for my girlfriend to provide her paperwork.

Just to let you know I will be in the area on the 7th October so ideally would like to complete by that time. Is this possible?

Thanks

[REDACTED]

Sent from my iPhone