

WBL Logbook Sheet Template

Name: [REDACTED] [REDACTED] [REDACTED]		
Competency e.g. 1	Learning Outcome e.g. 1.1	Example Number
4	4.2	1
Evidence provided e.g. letter to client dated 01.01.2017, Telephone attendance note dated 01.01.2017		
Excel spreadsheet sample of matter list with the due date and completion date for each matter, copy of a daily to do list W/C 04/07/2022		
Explain how the example meets the learning Outcome and how the evidence shows this		
<p>As an in-house paralegal, I have a wide range of clients from different areas of the business. Often this means that I have competing priorities, and I must prioritise matters from certain areas of the business. Additionally, if a colleague at director or Head of Service level requests that I complete a review or provide advice in a short time frame, I must prioritise this over other matters. At the time of taking on a matter I will either provide the client with a realistic date by which they can expect to receive a substantive response from me, or the Legal Support Officer on my team will send an acknowledgement email with a standard response time of 10 working days. I am confident that I always meet deadlines for clients, and if I had to prioritise a matter that was more business critical than another, I always ensure that I communicate with my clients and keep them updated.</p> <p>My team uses a central 'Contracts Matter List' which has a master spreadsheet and individual tabs for each member of the team. I use this to prioritise my work because each matter that I am dealing with is added to the spreadsheet. The information that is included in the spreadsheet is the client, task/activity, the case filing system (IKEN) reference, due date and completion date. I keep the spreadsheet updated and it is a good way to ensure that all matters are addressed in a timely fashion and by the deadline that I have told the client they can expect a substantive response from me.</p> <p>I also use a daily or weekly to do list so that I am able to see my priorities for the day and the week. This is also a really useful way to prioritise my workload because I am able to set out clearly which matters I need to address on that particular day. When dealing with a lot of matters concurrently, sometimes things are missed or can be accidentally forgotten. Using a to do list helps me to keep my focus and ensure that I address each matter that I need to do on that particular day or week.</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.		

When dealing with a range of different clients and matters it is really helpful to have one central document with all matters on. I can easily see when each matter is due and columns can be added to prioritise by urgency. I am also aware that I have to prioritise my work in order of how business critical the matter is, especially when I have a high workload.

Date work completed: (i.e. evidence date)	04/07/2022	
Applicant's Name Please print name	Applicant's signature I confirm that the work within the evidence is my own work	Date
██████████		Click here to enter a date.
Supervisor's Name Please print name	Supervisor's signature I confirm that I supervised the applicant's work referred to within the logbook sheet and the evidence	Date
██████████		Click here to enter a date.

Date	Initial Correspondence or /ref		Name of the Matter/Contract		Matter type	Tasks/Activities	Instructing individual	Case Owner	Date Due	Date completed
02/02/2022	Email and documents					Review Agreements			16.02.2022	14.02.2022
04/02/2022	Email		contract review			Review Agreements			18.02.2022	17.02.2022
07/02/2022	Email and documents		Deed of Novation		Deed of Novation	Review Agreements			21.02.2022	18.02.2022
07/02/2022	Email		Example Goods and Services contract		Services Agreement	Review Agreements			21.02.2022	21.02.2022
08/02/2022	Email and NDA				NDA	Review Agreements			22.02.2022	21.02.2022
09/02/2022	Email		Data Sharing Agreement		DSA	Review Agreements			23.02.2022	22.02.2022
09/02/2022	Email					Drafting & advice on contracts			23.02.2022	18.02.2022
02/03/2022	Email and Contract					Review Agreements			16.03.2022	11.03.2022

03/03/2022						Review Agreements			17.03.2022	
11/03/2022	Email and ISA				ISA	Review Agreements			25.03.2022	15.03.2022
14/03/2022	Email and Invoice					Invoicing	N/A		28.03.2022	22.03.2022
30/03/2022	Email and Agreement				NDA	Review Agreements			13.04.2022	25.03.2022
27/04/2022	Email and Agreement				NDA	Review Agreements			11.05.2022	12.04.2022
11/05/2022	Email and Agreement				DSA	Drafting & advice on contracts			25.05.2022	11.05.2022
18/05/2022	Email and Contract				Novation Agreement	Review Agreements			01.06.2022	23.05.2022
23/05/2022	Email and Agreement				NDA	Review Agreements			13.06.2022	01.06.2022

To do list...

W/C 04.07.2022

Task

- | Task | Complete |
|--|-----------------|
| 1. Email [REDACTED] with an update on the [REDACTED] fraud investigation agreement | 04/07/2022 |
| 2. Type up the advice for [REDACTED] on the NDA question | 06/07/2022 |
| 3. Read [REDACTED] advice on [REDACTED] | 06/07/2022 |
| 4. Email [REDACTED] with the next steps for [REDACTED] following [REDACTED] advice | 06/07/2022 |
| 5. Type up the written advice for the [REDACTED] matter | 07/07/2022 |
| 6. Draft the data protection clauses for the [REDACTED] Terms & Conditions and send them and the advice to [REDACTED] and [REDACTED] | 08/07/2022 |