

Name: [REDACTED]

Membership number: [REDACTED]

1. Competency: 4 Learning Outcome: 4.2

Management of workload – plan your workload and deliver a good legal service to clients or service users.

2. Evidence provided:

Sample of my electronic diary entries.

3. Outline how the evidence demonstrates you meet the outcome

I keep a regularly updated electronic diary of all matters that will need my attention, a sample of which is attached by way of evidence.

On receipt of my post I arrange for urgent matters to be prioritised. If necessary it may be that I will ask one of our administrators or another fee earner to assist. I will then arrange for my workload to be completed in order of priority.

If an urgent matter is given to me to be dealt with or any unanticipated events arise then it may be necessary for this to be given my attention above everything else. It will depend on the circumstances.

4. Reflection and evaluation (what you learnt from the activity you undertook to meet the outcome). Note: you may want to complete this section at a later date once you have had time to reflect on your practice and experience.

The most important thing is to be organised and provide an efficient service to the client. Keeping a regularly updated diary of 'to do' matters will ensure nothing is overlooked and that all parties I deal with are provided with the good service they expect.

5. Completion date:

1/4/15

6. Signed (applicant):

[REDACTED]

Date:

1/4/15

7. Signed (supervisor):

[REDACTED]

Date:

01/04/15

	Start Date	Reminder Time	Due Date	In F...	Categories	
Flag: Due Date: No Date						
	None	None	None	Inbox	Red Category	
Flag: Due Date: Today						
Review Mrs. [redacted] matter - re: tr...	Thu 12/03/2015	None	Thu 12/03/2015	Tasks		
Prepare final deed storage bill	Tue 31/03/2015	None	Tue 31/03/2015	Tasks		
Work through [redacted] and archive/bil...	Tue 31/03/2015	None	Tue 31/03/2015	Tasks		
Print off live matters for fee earner...	None	None	Tue 31/03/2015	Tasks		
Print out new matters for fee earn...	Tue 31/03/2015	None	Tue 31/03/2015	Tasks		
Flag: Due Date: Tomorrow						
Prepare bill ready for completion ...	Wed 01/04/2015	None	Wed 01/04/2015	Tasks		
Check any bills due for April	Wed 01/04/2015	None	Wed 01/04/2015	Tasks		
Check [redacted] money come in o...	Wed 01/04/2015	None	Wed 01/04/2015	Tasks		
Online training at 11am today [redacted]	Wed 01/04/2015	None	Wed 01/04/2015	Tasks		
Monthly bill and cheque on [redacted] i...	Wed 01/04/2015	None	Wed 01/04/2015	Tasks		
Flag: Due Date: This Week						
Start to prepare [redacted] financial ...	Thu 02/04/2015	None	Thu 02/04/2015	Tasks		
Heard from [redacted] and ad...	Thu 02/04/2015	None	Thu 02/04/2015	Tasks		
Council tax received on [redacted] s est...	Thu 02/04/2015	None	Thu 02/04/2015	Tasks		
Flag: Due Date: Next Week						
Prepare pocket money for [redacted] a...	Mon 06/04/2015	None	Mon 06/04/2015	Tasks		
Review [redacted] - any news from s...	Tue 07/04/2015	None	Tue 07/04/2015	Tasks		
Has approval/disapproval for the ...	Thu 09/04/2015	None	Thu 09/04/2015	Tasks		
Heard on [redacted] re costs assessed b...	Thu 09/04/2015	None	Thu 09/04/2015	Tasks		
Chase CW re [redacted] wills - updat...	Fri 10/04/2015	None	Fri 10/04/2015	Tasks		
Flag: Due Date: Next Month						
Review [redacted] investments and up...	Wed 15/04/2015	None	Wed 15/04/2015	Tasks		
Review pocket money for [redacted] j...	Wed 22/04/2015	None	Wed 22/04/2015	Tasks		
Interim bill on [redacted] - chec [redacted]	None	None	Fri 24/04/2015	Tasks		
Tax return information ready for a...	Thu 30/04/2015	None	Thu 30/04/2015	Tasks		
Flag: Due Date: Later						
Prepare payment for [redacted] s ...	Tue 05/05/2015	None	Tue 05/05/2015	Tasks		
Review all live matters - remind ot...	Thu 07/05/2015	None	Thu 07/05/2015	Tasks		
Deputyship account period ends o...	Sun 10/01/2016	None	Sun 10/01/2016	Tasks		