

WBL Logbook Sheet Template

Name:	[REDACTED]	
Learning Outcome and example number e.g. 1.1(1), 1.2(2), 1.2(1) 1.2(2) etc.	Page numbers from portfolio	
Take accurate instructions relating to a legal matter from clients or service users - 3.2 (1)		
Evidence provided and date of evidence e.g. Letter to client dated 01.01.2020 Telephone attendance note dated 01.01.2020		
Email to the insurer client and insured dated 05.01.2022 Email exchanges with the insured dated 05.01.2022		
Explain how the example -meets the learning Outcome and how the evidence shows this		
<p>Using appropriate techniques to take instructions from client: I wrote an email to the insurer client and insured to advise that our offer of £5,000 had not been accepted and sought instructions to make an increased settlement offer of £7,000 in respect of this claim. The insured responded to confirm that he was happy for us to offer an additional £3,000 to settle the claim.</p> <p>Confirm the instruction with the client: I responded to the insured client and advised that he refers to increasing the offer by £3,000. I noted that our recommended increased offer was £7,000 and therefore we would be increasing the offer by an additional £2,000 only. I respectfully asked for the insured client to clarify his instructions.</p> <p>Evidence of taking and confirming the instruction: The insured client confirmed his instructions in an email received on 05.01.2022 where he confirmed that he was supposed to state an increase of £2,000 and thanked for pointing this out. You will see that a copy of this email has been provided as evidence.</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.		
I understand the importance of clarifying instructions with your client to ensure the instructions are noted correctly in order to avoid any issues arising in the future. In this case, it was important for me to clarify that the insured client was agreeable with our increased offer which involved an increase of £2,000 only.		
Supervisor's Name	[REDACTED]	
Please print the full name of the supervisor that supervised the work referred to above within this logbook sheet and the supporting evidence.		

[REDACTED]

Sent: 05 January 2022 14:15
To: [REDACTED]
Subject: RE: URGENT INSTRUCTIONS REQUIRED - [REDACTED]
[REDACTED] - Your ref [REDACTED]

Sent: Wednesday, January 5, 2022 3:35 AM
To: [REDACTED]; [REDACTED]
[REDACTED]

Importance: High

CAUTION: This email originated from outside of the organization. Do not click links or open attachments unless you can confirm the sender and know the content is safe.

Dear Sirs,

Following your instructions, we made an offer to the Claimant in the sum of £5,000 in full and final settlement of the claim which has been rejected. The Claimant responded with a counter offer in the sum of £10,000 in full and final settlement of the claim.

Following a recent discussion with the Claimant's solicitors, the counter offer has been made on the basis that the Claimant's evidence is currently incomplete and he hopes that the updated evidence will provide some clarification on whether the Claimant's prospects of participating in dancing competitions has been limited as a result of the alleged accident. Given the reasoning set out in our correspondence dated 15 December 2021, we do not believe that the Claimant's counter offer of £10,000 is reasonable for acceptance especially as no evidence has been provided in support of the special damages claimed.

We previously advised that if the Defendant's offer of £5,000 is not accepted, then we would engage in further settlement negotiations with the Claimant's solicitors upon receipt of the updated medical evidence. The Claimant's solicitors have advised that the Claimant's clinical examination has been rearranged to the end of next week in the event that the Claimant's offer is accepted and the risk of incurring the disbursement for the examination would be avoided.

Given that liability has been admitted and the Claimant's medical appointment has been rearranged for a later date, we believe that it would be best to try and negotiate settlement further by making an increased offer of £7,000 in full and final settlement of the claim in a genuine attempt to settle this matter. This offer appears to be reasonable in light of Chapter 7 (N) (d) of the JC Guidelines which relates to a modest injury to the ankle where recovery is complete without any ongoing symptoms or scarring, thus providing an award up to £7,220 (including 10% uplift). In the event that this offer is not accepted or the Claimant responds with a further counter offer, then we would recommend waiting for the Claimant's finalised medical evidence before considering any further offers given that there is no prognosis.

We will proceed to make the offer by way of the Settlement Agreement. However, in the event that the Claimant refuses to sign the Settlement Agreement, please can we have your authority to make offers by way of Part 36.

We would be grateful if you could provide your urgent instructions by close of business **Friday 7 January 2022**.

We look forward to hearing from you.

Kind Regards,

[REDACTED]



[REDACTED]

From:

[REDACTED]

Sent:

05 January 2022 14:15

[REDACTED]
[REDACTED]

[REDACTED] [REDACTED]
[REDACTED] [REDACTED] [REDACTED]
[REDACTED] [REDACTED] [REDACTED]

From:

[REDACTED]

Sent: 05 January 2022 13:44

[REDACTED] [REDACTED]
[REDACTED] [REDACTED]
[REDACTED]

I think from a financial perspective it makes sense to offer the additional £3,000. If however the offer is not accepted, we pull all offers off the table and wait on the claimant to provide evidence medical evidence to support their claim. Please proceed with Part 36 if necessary.

[REDACTED] your thoughts?

[REDACTED]

Sent:

[REDACTED]
05 January 2022 14:15

[REDACTED]

[REDACTED]
[REDACTED]
[REDACTED]

[REDACTED]

Sent: Wednesday, January 5, 2022 9:09 AM

To: [REDACTED]

Subject: [EXTERNAL] URGENT INSTRUCTIONS [REDACTED]

[REDACTED]

CAUTION: This email originated from outside of the organization. Do not click links or open attachments unless you can confirm the sender and know the content is safe.

Dear [REDACTED]

Thank you for your instructions.

We note that your email refers to an increase of £3,000, however, our recommended increased offer is £7,000, thus increasing the offer by an additional £2,000 only. We would be grateful if you could clarify your instructions.

We look forward to hearing from you.

Kind Regards,

[REDACTED]

[REDACTED]

From: [REDACTED]

Sent: [REDACTED]

Subject:

[REDACTED] [REDACTED] [REDACTED]
RE: URGENT INSTRUCTIONS REQUIRED - [REDACTED]

[REDACTED] - Your ref [REDACTED] [REDACTED]

I meant to write £2,000 – thanks for calling that out.