

## WBL Logbook Sheet Template

<b>Name:</b> [REDACTED]	
<b>Learning Outcome and example number</b> e.g. 1.1(1), 1.2(2), 1.2(1) 1.2(2) etc.	<b>Page numbers from portfolio</b>
6.1(1)	207
<b>Evidence provided and date of evidence</b> e.g. Letter to client dated 01.01.2020 Telephone attendance note dated 01.01.2020	
<b>Email to client dated 9 March 2021.</b>	
<b>Explain how the example meets the learning Outcome and how the evidence shows this</b>	
<p><b>Identify the most recent CILEx Regulation Code of Conduct and other applicable conduct rules to any matter you are dealing with, including any ethical dilemmas:</b> The CILEx Code of Conduct sets out the principles to which CILEx members must adhere in their conduct, practice and professional performance, and the outcomes they must meet.</p> <p>Principle 3 of the CILEx Regulation Code of Conduct confirms that I must behave with honesty and integrity. Outcome 3.1 states that I must be honest in all of my dealings and in all financial matters. Outcome 3.2 states that I must not mislead anyone I deal with.</p> <p>I work for a firm of solicitors and I am also therefore regulated by the Solicitors Regulation Authority (<b>SRA</b>). The SRA's Code of Conduct describes the standards of professionalism that I am expected to meet.</p> <p>Principle 1.4 of the SRA's Code of Conduct confirms that I must not mislead or attempt to mislead my clients, the court or others, either by my own acts or omissions or allowing or being complicit in the acts or omissions of others (including my client).</p> <p>In the example provided, the ethical dilemma which had presented was that the Claimant was seeking a refund of an installation of £208.99, however, the Claimant was mistaken as to the cost of the installation as the actual installation charges were higher, as detailed more fully below.</p> <p><b>Identify how you will act in accordance with the rules:</b> In all of my work I ensure that I behave with honesty and integrity. I take steps to be open and transparent and to ensure that I do not mislead anyone.</p> <p><b>Apply these rules of professional conduct to your work:</b> In this work I was instructed to defend a claim that had been pursued by a customer of my client's for £208.99 which the Claimant stated was the price he had paid for the installation of a faulty system.</p>	

However, whilst liaising with my client regarding the installation it became apparent that the £208.99 installation was not the faulty installation. The faulty installation was actually higher (£387.98).

I therefore provided advice to my client to put forward an offer to refund the cost of the actual installation and explained that the offer should be higher than the amount claimed to account for the fact that the claim relates to the more expensive installation.

Whilst the Claimant was not aware that he had claimed incorrectly for the lower installation fee I took steps to ensure that I did not mislead the Claimant when making an offer to settle his claim for a refund of the installation fee and with my client's instructions I made an offer to settle for the true cost of the installation.

### **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 extremely important that I do not mislead opponents through my own acts or omissions. If I had made an offer on behalf of my client to refund the installation fee but failed to identify that the installation fee was in fact higher than the amount claimed then this would have been dishonesty by omission. Dishonesty could have a serious detrimental impact upon myself and my firm.**

### **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.

██


██



**Attachments:**

Hi 

**Action**

- Please provide instructions on the attached revised defence and suggested increased WP offer; and
- Confirm whether you have been able to obtain a copy of the  terms.

**Update**

Thank you for providing me with  comments on the draft defence.

I note that clarification regarding the installation address / date so I have tweaked paragraphs 8.1 and 8.2 to confirm the correct details.

I also note our instructions to make a WP offer.

We had initially advised to make an offer of £313.99 broken down as £208.99 being the cost of the system plus £105.00 being the court issue fee.

However, as this actually relates to the 2017 installation and not the 2015 installation the cost of installation is higher at £387.98 so we would recommend an offer of £492.98 (inclusive of court fee) is put forward.

Please can you confirm your instructions.

Kind regards

