



## WBL Logbook Sheet Template

Competency e.g. 1	Learning Outcome e.g. 1.1	Example Number
7	7.1	1 of 1
<b>Evidence provided</b> e.g. letter to client dated 01.01.2017, Telephone attendance note dated 01.01.2017 <b>Copy of my 2018 Performance Review</b> pages 280 to 286		
<b>Explain how the example meets the learning Outcome and how the evidence shows this</b> <p>Reflect on performance: I enclose a copy of my latest performance review which I completed, submitted to my supervisor prior to a meeting to discuss the same. Following said meeting I completed a summary of the same which is signed off by my supervisor. As can be seen from the enclosed, I reflected on my performance over the preceding 12 months, particularly comparing with my 2017 review the following year i.e. that I was taking on more responsibility and getting involved in more varied matters. From the meeting summary it will be noted that the team was generally happy with my performance.</p> <p>Identify strengths and weaknesses: the enclosed form sets out what I consider to be my strengths and identifying development needs these being:</p> <p>Strengths:</p> <ul style="list-style-type: none"> <li>-ability to provide high service to clients and completing work quickly and in accordance with deadlines</li> <li>- getting involved in firm initiatives such as the firm's charity of the year.</li> <li>- being a good team player and the ability to work under pressure</li> </ul> <p>Development Needs:</p> <ul style="list-style-type: none"> <li>- getting involved in department specific networking/external events</li> <li>- need to review cilex competencies I was struggling to meet to ensure my qualification was not delayed</li> <li>- getting involved in more non-contentious matters and more complex/technical contentious cases</li> </ul> <p>Identify objectives: Objectives to meet my development needs are set out in the enclosed form. These include:</p>		



- need to review and assess cilex competencies which needed to be met and prioritise finding examples to meet the same

- volunteering to help the professional support lawyer in the team organise a construction specific event and volunteer to write an article to improve my construction specific knowledge

- make an effort to get involved in non-contentious matters and construction specific/technical contentious matters

Plan for improvement: need to liaise with non-contentious lawyers in the team with a view to increase my knowledge in this regard, need to volunteer to help organise an event/write an article.

### 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 reflecting on my performance and identifying strengths and weaknesses to ensure that I can work on any development needs to improve my performance and consequently provide a high standard of service to clients and perform well in my role.**

**Date work completed:**  
(i.e. evidence date)

24/05/2018

**Applicant's Name**  
Please print name

**Applicant's signature**

I confirm that the work within the evidence is my own work

**Date**

## 2018 Review [REDACTED]

Reviewer Signed Off

Created

09/05/2018 14:31:54

Last Edited

24/05/2018 14:55:45

## Your Performance

## Financial Performance

[REDACTED]					End of Year Summary
Client Time A...	Client Time T...	Firm Time Ac...	Firm Time Ta...	% Overall Tim...	
910 hrs	1404 hrs	1014 hrs	488 hrs	102%	
Original Value Ti...	Current Value Tim...	Last Year Current...	% Growth		
£101,431.00	£140,699.00	£116,935.00	20%		
		% Time to Target	% Recoverability	% Overall Convers...	
Individual		65%	139%	90%	
Department		103%	103%	106%	
Firm		80%	75%	60%	
		WIP	Debt		
Individual		£0.00	£0.00		
Department		£160,588.00	£474,983.00		

Data retrieved 01/05/2018 06:30:01

Please provide a brief summary and overall self-assessment of your performance over the review period.

I believe I have performed well over the last 12 months. In particular following on from my review last year I feel I have gotten involved in more 'construction specific' matters including working on non contentious matters and having day to day conduct of more complex/high value matters (as opposed to a purely assisting role) which I think shows how I am moving away from a typical trainee role and undertaking tasks more akin to a qualified role in preparation for me qualifying next year. I also have more regular direct contact with clients and have less

work supervised. I would like to increase my involvement in both non contentious matters and more complex matters over the next 12 months, particularly as I have now finished all of my Cilex exams I would like to focus on gaining more experience and undertaking good quality work so that I can use the same as examples for my work based learning portfolio and increase the amount of independent/non supervised work I do. I believe I have made progress in relation to the development needs I set for myself last year as I have started to log/collate work examples in preparation for my portfolio and have made an effort to take on/get involved with numerous small to medium value matters with a view to acting as the main point of contact for the client. I am confident in relation to these matters and am able to undertake work with little supervision and would like to similarly increase my confidence in relation to more complex matters.

## Your Skills Assessment

Please refer to the relevant Skills Matrix for your Career Level and identify up to three skills where you feel you demonstrate a strength and up to three skills where you feel you need further development:

Skill	Evaluation	Comments
Client Service	Strength	I am able to turnaround work for clients very quickly and in accordance with any court deadlines etc. including drafting work in good time to allow for senior fee earners to review. I have had more direct contact with clients and feel that clients are generally pleased with the work I carry out for them.
Commercial Awareness	N/A	
Business Development	Development Need	I feel I am good at attending networking events for junior lawyers ( [REDACTED] etc.). I would like to get more involved in attending/volunteering to help organise more construction specific networking events such as [REDACTED] and the Autumn seminars etc.
Analysis & Judgement	N/A	

Skill	Evaluation	Comments
Firm Contribution	Strength	I make an effort to get involved in non fee earner activities both firm wide (i.e. charity of the year events) and department specific (organising team building).
Skills & Development	Development Need	For cilex purposes I need to review and asses the competencies/outcomes for which I have not yet found an example (or those which I anticipate will be difficult to demonstrate) so that I can flag these at an early stage with a view to undertaking a particular task/piece of work in order to meet the outcome without causing any unnecessary delay to me qualifying.
Leadership & Management	N/A	
Collaboration & Team working	Strength	I feel I am a good team player and am happy to help others out when needed to meet certain deadlines (even on matters which I have no previous involvement with). I think I am generally good at working to a deadline/under pressure and diarising deadlines (and reminding senior fee earners of the same) which need to be complied with on certain matters.

Skill	Evaluation	Comments
Technical Expertise	Development Need	<p>I will like to make more of an effort to get involved in more construction specific matters of a more complex/technical nature. I would also like to get involved in more non contentious matters as I think this would assist generally in improving my construction knowledge and would enable me to get involved with more varied matters. From a team perspective I think it would also assist the department generally if there was another fee earner who could help with non con work.</p>

## Growing Your Career

### Future Development

Please state how you would like to see your role / career develop over the next 12 - 36 months

I am now a graduate member of cilex following the successful completion of all the required exams. I am awaiting the results of my qualifying employment application (i.e. confirmation that the role I am currently in constitutes qualifying employment for work based learning purposes). I then have to collate examples to demonstrate various competencies into a work based learning portfolio which I am able to submit from 29 March 2019, following which I should qualify as a legal executive. I would like to see my role develop in the next few months so as to ensure I have a sufficient number of examples to use in my portfolio and also to reflect the fact that I should be a qualified fee earner within 12 months. In particular, whilst I think I have gained confidence during my time in construction in that I am able to work on lower value/simple claims with little supervision and am able to speak with/advise the client directly, I would like to similarly improve my confidence in relation to more complex matters/higher value matters.

### Manager Support

Please comment on the support and feedback you have already received from your manager and what you would like to receive going forward in support of your role and career.

It would be useful to have regular catch up meetings both with my direct manager and other senior members of the team who give me work so that I have up to date feedback on the things I am doing well/where I need to improve. Performance reviews are very helpful but as they only take place once a year it is easy to forget experiences which took place earlier in the year and whilst I assume other members of the team provide feedback to my direct supervisor, it would be

useful to receive feedback directly from them as I undertake work for numerous people. I think annual reviews coupled with more informal regular chats with members of the wider team would be helpful. I appreciate it I hard to give feedback in a department that is as busy as ours, but it would be useful to also receive feedback on individual pieces of work, especially in relation to work which I have drafted but is finalised/sent out by a senior fee earner so I am aware of what has been amended for future reference.

## Development Needs

### Current Development Needs

Description	Skill	Rationale	Approach	Priority	Target Date
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### Future Development Needs

Description	Skill	Rationale	Approach	Priority	Target Date
Review and Assess cilex outcomes which I have not yet met/anticipate will be hard to meet and seek to address this.	Business Development	To ensure that I can complete my work based portfolio as soon as possible so that this can be submitted as soon as I am able without causing delay to me qualifying.	On-the-job development	Medium	20/07/2018
Volunteer to help [redacted] organise a construction specific event.	Firm Contribution	To widen my non fee earner activities to include construction specific events (as opposed to just charity/junior lawyer type events)	Networking and memberships	Low	31/01/2019

Description	Skill	Rationale	Approach	Priority	Target Date
Make an effort to get involved in more non contentious matters and more construction specific/technical contentious matters.	Technical Expertise	To improve/widen my construction specific experience.	On-the-job development	Medium	30/04/2019

### SRA Declaration

☒ Reviewee's Annual Declaration (SRA)

I have reflected on my practice (providing evidence of at least 4 reflections) and addressed any identified development needs

☒ Reviewer's Annual Declaration (SRA)

Reviewee has reflected on their practice (providing evidence of at least 4 reflections) and addressed any identified development needs

### Review Summary

#### Meeting Summary (for reviewee to complete)

Please provide a summary of your review meeting discussion

Generally I am doing well and there are no complaints from the rest of the team - Am generally happy and have been given more responsibility/am busier compared to last year - Priority to work on is getting up to speed on non contentious matters - Going forward need to improve confidence so that I can advise clients without supervision, just asking for help when needed - Continue to work on attention to detail - double checking things before they go out. Documents should be in a state that I would be happy to send direct to a client - Discussion of the process for my qualification. I can submit my portfolio from 29 March 2019 but will likely come back with queries. Looking at qualification Spring 2019. Long term aim is to cross qualify as solicitor - Discussion of my strengths: client service: am reliable and able to get on with things. [redacted] gave example re wilful and deliberate research completed yesterday firm contribution: discussion re involvement with COTY. team working: Am able to work under pressure without getting stressed which is good attribute when working in a team - Discussion of my development needs: [redacted] I am to discuss with [redacted] re helping out with construction events and writing articles. Potential to volunteer to speak at a seminar once qualified Cilex: Some outcomes hard to prove such as equality and diversity. Possible examples to use are wide range of clients from different backgrounds etc. and cross office working. Technical expertise: need



to get up to speed on non contentious especially contract reviews. Work with [REDACTED] and [REDACTED]. In terms of manager support, I should let [REDACTED] know when I would like quick catch ups re performance. I should also take the initiative to run [REDACTED] where my work has been amended.