

## SFJ IC1- SQA Unit Code H55G 04

### Plan, document and cost the legal work to be undertaken



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#### Overview

This standard is about agreeing, planning and costing the work to be undertaken in relation to the legal matter agreed with the client.

It is about meeting legal, organisational and regulatory requirements in relation to client care within your area of responsibility.

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#### Performance criteria

- You must be able to:*
- P1 agree and/or clarify the legal matter to be addressed with the client
  - P2 analyse client's instructions to determine the work required to progress and conclude the legal matter
  - P3 prepare a resource plan detailing all the work to be carried out to progress and conclude the legal matter
  - P4 prepare a cost estimate for the work to be carried out in accordance with legal, organisational and regulatory requirements
  - P5 raise any issues/risks to the work being carried out with the appropriate person
  - P6 prepare a client care letter outlining the planned work and the estimated costs to progress and conclude the legal matter
  - P7 provide the client care letter in accordance with legal, organisational and regulatory requirements to;
    - P7.1 peer/supervisor, where applicable, for review and approval
    - P7.2 the client for review and approval to carry out the work
  - P8 record details of the provision of the client care letter in accordance with legal, organisational and regulatory requirements

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### Knowledge and understanding

*You need to know and understand:*

- K1 how to analyse clients instructions to identify the work required to progress and conclude the legal matter
- K2 the limits of your own authority and how and when to refer to others
- K3 the implications for the client and the organisation of not referring to others where work is outside the limits of your own authority
- K4 how to complete an accurate resource plan in accordance with legal, organisational and regulatory requirements
- K5 the different information and methods for preparing a cost estimate for legal work
- K6 the different costing structures available when preparing estimates for legal work
- K7 how to complete a cost estimate using the correct costing structure in accordance with legal, organisational and regulatory requirements
- K8 the information that must/must not be included in a client care letter
- K9 how to prepare and provide a client care letter in accordance with legal, organisational and regulatory requirements
- K10 the roles and responsibilities of others in relation to planning, documenting and costing legal work
- K11 the legal, organisational and regulatory procedures for maintaining records of planning and costing legal work

### Glossary

### Client

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The person you are working with or on behalf of. Depending on the organisation and nature of your job role this may include one or more of the following:

- 1 external clients or customers
- 2 internal colleagues

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**Suite** Providing Legal Services

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