

Name: [Redacted]

Membership no: [Redacted]

1. Competency: 8

Learning Outcome: 8.1

Establish effective working relationships with others involved in a legal matter.

2. Evidence provided:

Telephone note and e-mails to Claimant's solicitors.

3. Outline how the evidence demonstrates you meet the outcome

**Understand the importance of effective working relationships with other professionals involved in the matter:** I took over conduct of a file from a colleague and put forward offers to settle the file. The attached telephone note and e-mails show that I established a working relationship with the Claimant's solicitor, allowing us to negotiate settlement of the claim.

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.

I understand the importance of quickly establishing a working relationship with others when taking over conduct of a file so as to be able to progress the matter to settlement.

5. Completion date: 27.06.13

6. Signed (applicant)

[Redacted Signature]

Date:

16/10/13

7. Signed (supervisor)

[Redacted Signature]

Date:

3/10/13

# TELEPHONE NOTE

## Outgoing Telephone Call

Client:

[REDACTED]

Matter Description:

Mr A [REDACTED] E [REDACTED] v T [REDACTED] F [REDACTED] M [REDACTED] A [REDACTED]

Matter Ref:

[REDACTED]

Attending:

P [REDACTED] W [REDACTED] C [REDACTED]

Attended by:

G [REDACTED] K [REDACTED]

Date:

27th June 2013

Total Time:

6

Persuasion Points Argued: ✓

G [REDACTED] called [REDACTED] - put forward offer of £8905.00. P [REDACTED] will review file and get back to G [REDACTED]

Agreed Time Scale for Response: 5 w/days

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[Redacted]

From: G [Redacted]  
Sent: 27 June 2013 14:45  
To: 'P [Redacted] H [Redacted]'  
Subject: RE: A [Redacted] E [Redacted] v T [Redacted] F [Redacted] M [Redacted] A [Redacted] - Without Prejudice([Redacted])  
Dear P [Redacted]

WITHOUT PREJUDICE SAVE AS TO COSTS

Thank you for your e-mail. In an effort to settle this matter today, I can increase my offer to £10500.00 in full and final settlement of your client's claim, inclusive of interest and interim payments. We agree to pay your client's reasonable costs on the standard basis to be assessed by way of detailed assessment if not agreed.

I look forward to hearing from you when you have your client's instructions.

Kind regards

G [Redacted]

From: P [Redacted] H [Redacted] [mailto:p [Redacted]]  
Sent: 27 June 2013 14:41  
To: G [Redacted]  
Subject: A [Redacted] E [Redacted] v T [Redacted] F [Redacted] M [Redacted] A [Redacted] - Without Prejudice([Redacted])

Dear G [Redacted]

I note your offer at £8,905.00 to settle in response to our Part 36 at £12,000.00.

I have taken instructions. The offer is not accepted.

My client would be prepared to accept a global offer of £11,000.00 to settle now plus costs on the standard basis to be assessed if not agreed. I have authority to settle at this amount.

I look forward to hearing from you.

Regards,

P [Redacted]