

CILEX

CPQ

F5/F6 – Professional and Legal Skills

Foundation Stage

2021

Professional and Legal Skills

The aim of this module is to equip you with the professional and legal skills required to perform the role of a paralegal in a fast-paced legal environment. There is a focus on how to conduct yourself and your work effectively and efficiently and how you will be able to support a team. On completion of the module, you will be able to conduct legal research and have a greater appreciation of effective communication in an increasingly high-tech legal environment.

The module covers:

1. Succeeding in the Legal Environment; The Role of the Paralegal in a Legal Environment
 - Personal Impact
 - Working in a Team
 - Setting Standards
 - Client First Approach
 - Commercial Focus
 - The Impact of Technology
2. Effective Communication
3. Communicating with internal and external clients
4. Using Technology to carry out Legal Research; Conducting Legal Research

Learning Outcomes

By the end of this module you will be able to:

1. Understand the essential work skills a Paralegal requires
2. Explain how the role of the paralegal contributes to the law firm commercially
3. Understand how technology is being used in the legal sector
4. Demonstrate the skills required for effective communication with internal and external clients
5. Be able to undertake basic legal research

Linked online assessments:

- F5 Succeeding in a legal environment
- F6 Legal Research

F5. Succeeding in the Legal Environment

Your Role as a Paralegal in a Legal Environment

1. Personal Impact

A paralegal will interact with staff at all levels of the organisation, as well as with external clients. You will need an appreciation your conduct and personal impact on others, to be effective in the workplace.

- a) Interpersonal relationships
 - Understand techniques to create a positive impression e.g. conduct, respect, inclusion, reliability
 - Recognise negative behaviours in yourself and others
 - Know why it is important to be honest and reliable in all professional dealings
 - Appreciate the importance of attention to detail and the implications/risks of not being so
 - Cultivate a positive 'can do' attitude
- b) Equality, diversity and respect
 - Recognise and respect equal opportunity and diversity
 - Understand the importance of cultural difference in a legal environment
- c) Time Management
 - Understand the importance of good time management
 - Plan, prioritise and organise own time in a work environment
 - Be aware of the value of billing time, understanding chargeable and non-chargeable time
 - Identify barriers to effective time management and know how to overcome them
 - Identify the impact on the business of poor time management
- d) Building rapport and effective working relationships
 - Identify opportunities for sharing knowledge promptly with the right person
 - Understand the opportunities for Identifying and using information sources
- e) Networking
 - Understand the importance of networking internally and externally
 - Identify opportunities to develop internal networks

2. Working in a Team

All employees will be part of a team, regardless of the size of the organisation. You have opportunity to impact positively or negatively on your team. Understanding your role in the team and how to contribute will be important in building a strong professional reputation.

- a) Role within a team and the organisation
 - Define different types of organisational teams; functional, problem-solving, project teams
 - Develop and contribute ideas and use a mentor
 - Know when to seek assistance
- b) Managing team workload
 - Recognise the importance of pro-actively supporting others to manage team workload
 - Identify core information to understand issues
 - Consider approaches to reporting progress effectively
- c) The impact of technology on teams
 - Understand how technology can be used to record and share information and the requirements for sharing data with others, including risks
 - Understand the importance of virtual team development, meetings and networking

3. Setting Standards

You should be able to demonstrate an awareness of the general requirements of the CILEx professional standard. You should also be able to understand the importance of appraisals and CPD in achieving continuous improvement.

- a) External Regulation
 - Be aware of the CILEx professional standards
 - Understand the duties and responsibilities of the code for professional and personal conduct
- b) Appraisal and CPD as a driver for improvement
 - Recognise the self-appraisal role in your personal development; skills, technical and operational competence
 - Understand the value of seeking and taking on board regular feedback
 - Understand the CILEx CPD requirements
 - Identify where to access CPD
 - Know how to communicate CPD requirements to a supervisor
 - Create and implement a personal development plan

<p>4. Client First Approach</p>	<p>The successful paralegal trainee needs a client centred approach to deliver a high-quality service on time, every time. Whether you are dealing with internal or external clients, the same level of service needs to be achieved.</p> <ul style="list-style-type: none"> a) The relationship of external client service to the success of the organisation <ul style="list-style-type: none"> • Appreciate how service chains operate in a legal environment • Know how the role involves supporting client care b) The importance of the internal client <ul style="list-style-type: none"> • Recognise the direct link between internal clients and the quality of service received by the external client • Understand what client service standards apply to internal clients and how they may differ from those applied to external clients c) The impact of client relationships on the success of the lawyer <ul style="list-style-type: none"> • Understand the ways in which client relationships can be nurtured d) Fulfilling professional and ethical considerations <ul style="list-style-type: none"> • Understand how clients are served in an ethical and professional way
<p>5. Commercial Focus</p>	<p>A commercial approach is vital to a successful law practice and an essential attitude for a trainee to develop. Regardless of the environment you find yourself in, whether that be working in the private or public sector, you need to think commercially for the enterprise to succeed.</p> <ul style="list-style-type: none"> a) Opportunities to practise law <ul style="list-style-type: none"> • Know the types of organisations where law is practised • Distinguish between contentious and non-contentious work • Recognise the factors which impact on different organisational structures b) Commercial opportunities in a legal practice <ul style="list-style-type: none"> • Explain how a commercial law generates income • Identify the factors that can impact on an organisation's performance • Identify the range of services provided by a law firm c) The impact of non-legal functions within a legal organisation structure <ul style="list-style-type: none"> • Understand how non-legal functions interact with the legal function

6. The Impact of Technology

Technology has increasing importance in professional services. From case management systems and accounting software to artificial intelligence, the legal professional needs an awareness of the current and potential impact of technology.

- a) Different types of software applications used in the workplace
 - Understand how to use standard software applications in the business environment, for word processing, creation of spreadsheets and using databases
- b) The appropriate use of systems in practice
 - Understand the place of systems in a legal environment including:
 - Customer Relationship Management systems
 - Case Management systems
 - Cloud computing
 - Cloud file sharing
- c) Using technology to communicate
 - Identify the differences in communicating formal and informal business information
 - Understand etiquette in communicating using IT systems
- d) The risks associated with office technology
 - Identify the risks associated with office technology when dealing with external clients
 - Systems e.g. security and access management
 - Data e.g. confidentiality, ethical walls, data protection and data transfers

Effective Communication

7. Communication with Internal and External Clients

Communication skills are fundamental to building confidence with clients and peers. You will have to communicate effectively, both orally and in writing, with internal and external clients. This will involve speaking to individuals, listening to what they have to say and noticing the way they respond to the message you are giving them. When you communicate in writing, you must ensure that there are no spelling errors and that the document is grammatically correct.

- a) The importance of effective communication within a legal environment
 - Identify the range of internal and external clients a legal professional will communicate with
 - Identify the ways in which legal professionals communicate with clients and third parties
 - Understand the range and appropriate methods of communication to use with specific clients and third parties

- Understand the internal and external barriers to effective communication in a legal environment
- b) The use of verbal communication to effectively communicate a message
- Prepare effectively for verbal communication situations e.g. interviews with clients
 - Distinguish between the types of question to be used in different situations
 - Understand the effect tone of voice and language can have on the receiving party
- c) The role non-verbal cues play in effective communication
- Recognise different types of non-verbal communication
 - Understand the range of non-verbal responses and the effect they can have on the communication process
- d) Actively listening to internal and external clients in order to effectively meet their requirements
- Accurately receive and interpret messages while communicating
 - Use active listening skills to fully understand the message
- e) The importance of effective and accurate legal writing
- Understand the effect well written legal correspondence has on those who receive it
 - Be able to effectively take notes upon which others can then base correspondence
 - Be able to recognise correspondence, which is grammatically correct, with no spelling mistakes
- f) Drafting original and precedent forms of communication
- Understand the importance of the client care letter
 - Understand the content of the client care letter
 - Understand the differences between a:
 - Routine letter
 - Client letter
 - Attendance note
 - Matter creation form
 - Email
 - Text
 - Website correspondence

F6. Using Technology to Carry Out Legal Research

8. Conducting Legal Research

Essential to the provision of good legal advice is the ability to effectively research the law. You need to be able to find the appropriate sources, understanding the weight to be given to them and then use those sources to answer the legal problem.

- a) The scope and purpose of legal research, ascertain the legal context and issues
 - Understand how legal professionals use research as a tool for a prescribed reason to contribute to an agreed outcome
 - Identify the legal issues raised by the problem
 - Identify the types of question that need to be investigated and answered
- b) Determining the most appropriate legal resources to use
 - Understand the range of resources available to carry out legal research, including print and online resources
 - Distinguish between primary and secondary sources
 - Demonstrate an understanding of the strengths and weaknesses and validity of different formats
- c) The importance of search terminology to use legal sources effectively
 - Understand the terminology associated with research on electronic formats
 - Evaluate the benefits and dangers of internet searches
- d) Using primary sources (Acts of Parliament, statutory instruments and case law) to inform research
 - Demonstrate knowledge of the structure of Acts and Statutory Instruments
 - Appropriately cite legislation
 - Demonstrate knowledge of the structure of law report
 - Appropriately cite law reports
- e) Evaluating different online sources
 - Differentiate between primary and secondary sources in terms of validity e.g. reliability and relevance
- f) Applying research to reach a conclusion and communicating the results
 - Apply research findings to a problem to reach a conclusion which is clear
 - Provide a response to a problem that has been researched in an appropriate format
- g) The ethics and legality of information use
 - Understand relevant intellectual property rights (copyright and fair use)

