

Step 9: Preparing for Assessments

Activity: In-tray exercise

You are a trainee solicitor. It's 8.45 am on Tuesday morning and you are reviewing your outstanding 'to do' list:

- A completion statement needed for Friday. It relates to a large sale and purchase, and you need some peace and quiet to work through the finances and check all is order. You'd hoped to start it today, as it could take a couple of hours or more to complete.
- A piece of research on an area of law you are currently unfamiliar with. You think it's likely to take a good two to three hours in the library, and the partner who has requested the research wants it 'as soon as possible'.
- Drafting a will for a new client. As you took the initial instructions from the client it would be difficult to delegate it to another trainee. You promised the client that you would have it ready for signature and witnessing by lunchtime tomorrow.
- You have an internal meeting planned this lunchtime between 12.00 and 1.00pm. The Head of Department is very keen that everyone attends, and checks the attendance list personally.
- You're also due to attend an event for local lawyers at 6.30pm this evening.

You receive a text from an old friend checking that you're still on for lunch today. You have been trying to meet up for two weeks, and you have already cancelled him once. Your friend is keen to get your input on a training contract application he is making and the deadline is looming.

You notice that you have new voicemail, and listen to 2 messages:

- One is from a good client of the firm who wants you to give him a 10-15 minute update on a case you are working on for him. It will take you a couple of hours to pull together a useful summary, and he says he will be calling into the office 'later today'.
- A partner is asking you accompany her to a client meeting at 9.30 am, as it is important you are there to take notes.

Task:

List below how you would prioritise your day: what action you plan to take, and why.

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Once you have jotted down your actions consider:

Large tasks can be broken down into smaller 'pieces' – you can make a start and keep those involved informed of your progress: for example, you could make a start on the will for your client, call the client and update them on progress and discuss when would be a mutually convenient time to meet to review the draft will.

Delegate and seek help – is there anyone (another trainee, secretary, paralegal) who can 'make a start' on some of the larger or more complex pieces of work: for example, could another trainee begin work on the completion statement?

Agree deadlines if they are not clear: for example, speak to the partner who wants the research carried out "as soon as possible" and agree a feasible deadline. Call the client who is planning to drop in 'later today,' explain you are in a meeting until 1pm, and schedule an appointment for later in the afternoon.

Priorities: consider who is more important. As a general rule of thumb:

- Clients
- Partners
- Departmental meetings
- Friends

... but you must consider the relevant 'weight' of the individual requests: just because someone says something is important, that may not be the case. Is it important that YOU go with the partner to take notes, or would another trainee do as well?

Do not forget the 'social' and 'personal.' A meeting with a friend may be a lower priority, but you should not drop personal or social commitments too easily. Strive for a compromise - for example, is it appropriate to invite your friend along to the event for young lawyers? If he is seeking a training contract, he may welcome the opportunity to network, and you could discuss his training contract application afterwards.