Placement Task Checklist

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NOTE: THIS CHECKLIST IS A GUIDE ONLY
USE OF THIS DOCUMENT IS NOT COMPULSORY

This is a guide for trainees and supervisors to ensure suitable tasks are provided during a PLT placement. Leo Cussen recommends using this document to help deliver a successful placement experience.

Practical tasks

Most tasks should be practical and hands-on. Some observation/shadowing is valuable, but most activities should focus on 'doing' rather than 'watching'.

Substantive legal tasks

The placement should predominantly focus on substantive legal tasks. While some administration is inevitable, administrative tasks (such as photocopying and dictation) should be kept to a minimum.

Task checklist

Trainees should aim to tick off as many items from this checklist as possible. Since every office is different, this checklist is only intended as a guide. It is not a requirement that every box be ticked.

Aim to tick off:

1. at least **eight** tasks in total; and
2. at least **one** task from each group heading.

DRAFTING & REVIEWING DOCUMENTS

Task	✓
1. Draft external correspondence *E.g. to a client or external organisations (such as courts, barristers, other lawyers, government departments etc).*	
2. Draft internal correspondence *Draft correspondence (such as memos of advice) to one or more staff members in your office.*	
3. Draft documents *E.g. Court documents, transfers, wills, agreements, costs disclosures, settlement documents, etc. You may wish to check if there are templates/precedents that can be used to guide you.*	
4. Review client files *Read over one or more client files (in full) to understand the background of a matter, as well as the course of action taken so far.*	
5. Review, analyse or proof-read documents *E.g. contracts, correspondence, court documents, discovery documents, agreements, articles, cases, legislation etc.*	

INTERACTION WITH CLIENTS, COLLEAGUES & EXTERNAL ORGANISATIONS

Task	✓
6. Attend client interviews *Attend and observe a client interview and take file notes. This includes internal and government clients.*	
7. Take instructions from a client *Take instructions from a client or clarify a client's requirements. This could be in a client interview, over the phone, or via written correspondence.*	
8. Conduct phone calls with external clients or organisations *Answer or make phone calls to/from clients or external organisations (such as courts, barristers, other lawyers, government departments etc).*	
9. Attend and observe a staff meeting *This could be a formal or informal staff gathering to discuss work-related matters.*	
10. Attend and observe a dispute resolution mechanism *E.g. a court/tribunal hearing, mediation, negotiation, conciliation, or other dispute resolution forum.*	
11. Liaise regularly with your supervisor *Liaise with your supervisor regularly to discuss allocation of tasks, reflect on previous activities, and gain feedback on your work so far. Consider also asking for broader career advice.*	
12. Meet with other lawyers & barristers *Seek out other lawyers in the office to learn about what they do. Go along to barrister meetings if available.*	
13. Meet with non-lawyer staff *If you are in a larger office, meet with other staff members to learn about their different functions and roles within the organisation. E.g. office managers, trust accountants, legal assistants.*	

RESEARCH & LEARNING

Task	✓
14. Conduct legal research *E.g. case law, legislation, government policies, journal articles etc.*	
15. Draft a memo of findings/options/advice *Based on your research, draft a memo presenting your findings/options/recommendations.*	
16. Attend a training session *E.g. a professional development seminar covering a topic relevant to the work of your office (delivered either internally or externally)*	

FILE, RISK & PRACTICE MANAGEMENT

Task	✓
17. Observe and/or participate in office procedures *Ask your supervisor (or another suitable staff member) to explain the various office systems & procedures. How is the office run? How are clients billed? What work-place policies are in place?*	
18. Diary management *Assist with scheduling and following up on critical dates such as client meetings, reporting deadlines, filing deadlines, and court hearings.*	
19. Participate in Risk Management E.g. conduct conflict checks, draft costs disclosures, carry out verification of identity *etc.* *Discuss risk management with a staff member: What systems/checks are in place to manage risk? (E.g. what are the office's cybersecurity and document retention policies? See this link for more).*	
20. Discuss ethical issues *Ask your supervisor (or another suitable staff member) to describe legal ethical di-lemmas that the office has faced in the past, and how they were dealt with. You may choose to use this as an opportunity to seek guidance on other ethical issues.*	
21. Learn about the office's file management system *Receive a demonstration of (or training in) the file management system used by the office. What software do they use to manage matters/tasks/projects/files? If they don't use software, what alternative system is in place?*	

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