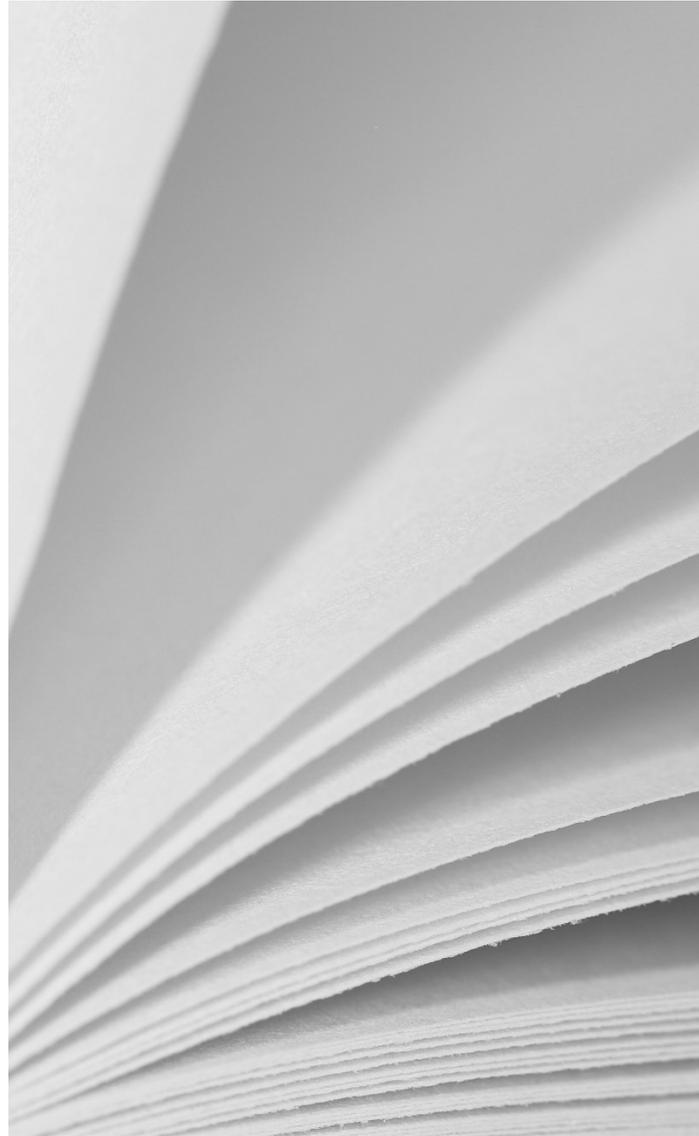

Ongoing Competency Framework



1 March 2024

Costs Lawyer Standards Board

CLSB


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About the Ongoing Competency Framework

Purpose of the framework

We recognise that professional competence is not a fixed and static concept, but rather a dynamic one that is dependent on a range of factors. Costs Lawyers might require knowledge and skills that are specific to their job role, area of practice, stage of career, or changes to the law or client expectations.

You must engage in ongoing professional development to ensure you remain competent and up-to-date by reference to your individual role and circumstances. By acknowledging the importance of continuous learning and development, you can advance your career, adapt to a changing environment and ultimately provide a better service to your clients.

While the competencies set out in the [Costs Lawyer Competency Statement](#) apply to all Costs Lawyers from the point of qualification, this document sets out additional or enhanced competencies that are likely to be required as you progress through your career. It does so by building on the skills identified in the Competency Statement, focusing on three practising scenarios in which Costs Lawyers are likely to find themselves after qualification, namely becoming:

- an experienced practitioner;
- a people manager; and/or
- a business manager.

The practising scenarios in the framework inevitably intersect and overlap. A Costs Lawyer might be, at the same time, an experienced practitioner, a people manager and a business manager; or might become a business manager but not a people manager, having established a sole practice; and so on. Equally, not all the skills listed under each practising scenario will be relevant to every practitioner, and there will be skills required for individual roles that are not covered in the framework. We expect you to think about the skills you need to be competent in your own role as your career unfolds, and the framework is a tool to help you do that.

Linking the framework to your CPD

You should use the framework as you progress through your career, to help you identify the additional skills needed to perform your role as that role changes and develops. You will also need to plan ahead to acquire the skills required to competently perform any roles to which you aspire in the future.

If you identify skills that are relevant to your role (or to future roles or aspirations), you should consider whether you are already competent in those areas or whether you require training, mentoring or other types of professional development and support. A good moment to do this is when planning your CPD for the year ahead and setting your annual CPD objectives. In that context, you should consider whether you need to undertake CPD activities that will build one or more of the skills in the framework. CPD activities that are relevant to your objectives will count toward the minimum annual CPD requirement in the CPD Rules.

Parts of the framework

The remainder of this document sets out the skills that Costs Lawyers should consider across three common practising scenarios. The elements of the framework are summarised on the next page.

As in the [Costs Lawyer Competency Statement](#), for each skill behavioural indicators have been used to provide examples of what it looks like when someone displays the skill (positive indicators) or lacks the skill (negative indicators). The behavioural indicators are designed to help you understand what is likely to be expected of you. Again, some skill areas overlap and one behaviour might indicate a number of skills. Similarly, the indicators are not exhaustive; a skill can be demonstrated in many ways and the indicators should be taken as a guide.

Practising scenarios

Skills



Experienced practitioner

Managing own performance and contribution

Developing a specialist practice

Mentoring



People manager

People engagement and culture

Team building and collaboration

Performance management

Conflict resolution

Leadership development

Commercial awareness

Business leadership and strategy



Business manager

Financial management

Change management

Business development

Marketing

Customer service and client relationships

Practising scenario 1: Experienced practitioner

Consider these skills if you:

- take on a senior role within your team or organisation
- have sufficient expertise to become a specialist in one or more areas
- have been working in costs law and practice for several years

Managing own performance and contribution	What is it?	The ability to take responsibility for personal development, setting goals, prioritising tasks and delivering high-quality work, acting as a role model for professionalism and integrity.	
	Why is it important?	It allows experienced practitioners to maximise their potential, demonstrate accountability and consistently deliver high-quality work that contributes to personal growth, professional development and alignment with business goals.	
	How does it help?	People who demonstrate this skill will be able to identify relevant continuous learning opportunities and advance their career through effective prioritisation, reflection and improvement.	
	Positive behavioural indicators	Negative behavioural indicators	
	<ol style="list-style-type: none"> 1. Establishes clear professional goals and pursues them proactively 2. Engages in self-assessment, seeking feedback and actively pursuing opportunities for professional growth and development 3. Takes responsibility for delivering high-quality work, meeting deadlines and ensuring professional standards are upheld 4. Embraces change, adapting to new situations and learning from setbacks 5. Seeks ways to enhance knowledge, skills, and effectiveness through training, mentorship and learning from experience 6. Manages time and resources effectively, including through appropriate prioritisation and delegation 	<ol style="list-style-type: none"> 1. Is unreceptive to feedback, missing opportunities for improvement or disregarding constructive criticism 2. Shifts blame, makes excuses or fails to take ownership of mistakes and shortcomings in performance 3. Lacks motivation for growth, remaining complacent in current knowledge and skills 4. Competently uses individual strengths, but fails to identify and address individual weaknesses 	

Developing a specialist practice	What is it?	The ability to identify gaps, trends and changes in the market, align one's skillset with those developments, and proactively build a client base within a specific area of expertise.		
	Why is it important?	It allows experienced practitioners to differentiate themselves as recognised experts and provide an authoritative service to clients in a specific field, enhancing professional reputation and generating opportunities for growth.		
	How does it help?	Specialising and developing expertise in a specific area has a dual purpose for the individual practitioner and the public interest, by promoting competition, innovation and professionalism.		
	Positive behavioural indicators		Negative behavioural indicators	
	<ol style="list-style-type: none"> 1. Identifies emerging trends, industry demands and areas where specialised expertise is needed 2. Improves and expands knowledge and skills to become a recognised specialist with a unique offering for clients 3. Builds extensive, relevant relationships and networks 4. Shares expertise and opinions to establish credibility and demonstrate thought leadership 5. Provides clients with tailored solutions and exceptional service 		<ol style="list-style-type: none"> 1. Fails to identify or focus on expertise that is aligned to clients' needs 2. Neglects knowledge and skills leading to stagnant or outdated practice 3. Misses opportunities for professional growth 4. Poorly communicates expertise to the market 	

Mentoring	What is it?	The ability of an experienced practitioner to build a reputation as a go-to expert by serving as a valuable resource and trusted mentor for other Costs Lawyers, sharing knowledge and expertise and providing guidance and support.		
	Why is it important?	It enables knowledge transfer, enhances mutual professional development, supports wellbeing and ethical conduct in challenging situations, and strengthens costs businesses and the profession as a whole.		
	How does it help?	People who demonstrate this skill will be able to share knowledge and expertise in a way that provides advice and support to others, helping to build networks and contribute to an inclusive professional culture.		
	Positive behavioural indicators		Negative behavioural indicators	
	<ol style="list-style-type: none"> 1. Makes it known they are open to mentoring opportunities, whether formal or informal 2. Is accessible and responsive to mentees' needs, actively making time for others and demonstrating openness to providing guidance and support when required 3. Demonstrates genuine interest in mentees' concerns and questions, listening attentively and seeking to fully understand their perspectives and challenges 4. Provides constructive and supportive feedback, offering specific suggestions for growth and development 5. Encourages mentees to take initiative, make decisions and take ownership of their professional development 6. Collaborates with mentees to set clear, achievable goals that align with their career aspirations and those of their business, providing guidance on how to achieve those goals 		<ol style="list-style-type: none"> 1. Is unresponsive to mentees' enquiries or consistently fails to allocate time for mentoring activities 2. Demonstrates a lack of attention or interest in mentees' concerns, focusing instead on conveying their own knowledge and experience 3. Provides overly discouraging feedback that focuses on pointing out mistakes without offering constructive suggestions for improvement 4. Exerts excessive control or insists on specific approaches 5. Focuses exclusively on formal mentorship, ignoring the potential benefits of supporting colleagues on discrete issues or tasks 	

Practising scenario 2: People manager

Consider these skills if you:

- become a line manager
- become a team leader
- take on a role that involves supervising, training or developing others
- are supervising a colleague's period of Qualifying Experience
- have aspirations to do any of the above

People engagement and culture	What is it?	The ability to manage people productively and respectfully by communicating information clearly, actively listening, providing feedback and facilitating open and transparent working relationships.	
	Why is it important?	It builds a collaborative and inclusive work environment and encourages understanding and trust, promoting productivity and wellbeing.	
	How does it help?	People who demonstrate this skill will be able to create a positive workplace culture that contributes to ethical conduct, employee engagement and satisfaction, and staff retention.	
	Positive behavioural indicators	Negative behavioural indicators	
	<ol style="list-style-type: none"> 1. Expresses thoughts and ideas clearly and positively, generating buy-in from others and enthusiasm for new initiatives 2. Actively listens to others, demonstrates empathy and seeks to understand the perspectives of others 3. Recognises and celebrates team members' contributions and achievements 4. Encourages open and honest communication, shares information appropriately and addresses issues promptly and sensitively 5. Builds trust by respecting confidentiality 	<ol style="list-style-type: none"> 1. Communicates in a way that results in uncertainty or misunderstandings 2. Disregards input from colleagues or ignores concerns raised 3. Makes false promises or repeatedly fails to follow through 4. Withholds information or is secretive, creating a culture of mistrust and speculation 5. Fails to adapt communication style to audience or recipient, resulting in ineffective communication and conflict 	

Team building and collaboration	What is it?	The ability to create a cohesive and collaborative team environment, building strong relationships among team members, managing conflicts and promoting effective teamwork to achieve common goals.	
	Why is it important?	It helps to enhance productivity, innovation and goal attainment by enabling individuals to work together effectively as a cohesive unit.	
	How does it help?	People who demonstrate this skill will be able to amplify individual contributions through collective problem-solving and sharing of resources.	
	Positive behavioural indicators		Negative behavioural indicators
	<ol style="list-style-type: none"> 1. Builds trust in the team by promoting transparency and integrity 2. Encourages the sharing of ideas, knowledge and resources 3. Addressing conflicts or issues within the team in a constructive and timely manner, generating healthy resolutions 4. Promotes effective teamwork through clear goal setting, role clarity and encouraging a sense of shared purpose 5. Identifies and manages the varied strengths and weaknesses of individual team members 6. Recognises and celebrates joint achievements to boost morale and encourage a positive team spirit 		<ol style="list-style-type: none"> 1. Leaves conflicts or issues unresolved, creating a toxic working environment 2. Fails to build trust among team members, resulting in a lack of cooperation and reduced team performance 3. Displays favouritism or unfair preference to certain team members 4. Creates an overly bureaucratic or hierarchical team structure 5. Imposes team goals without encouraging a sense of shared purpose and motivation

Performance management	What is it?	The ability to set clear performance expectations for others, provide constrictive feedback, evaluate individual and team performance and facilitate professional development.	
	Why is it important?	It promotes a culture of accountability, growth and continuous improvement that optimises individual and team performance, identifies areas for improvement and ensures alignment with business need.	
	How does it help?	People who demonstrate this skill will be able to improve individual and team performance by setting clear expectations that are aligned to business goals, and help individuals to identify roles or career paths that are well-suited to their ambitions and attributes.	
	Positive behavioural indicators	Negative behavioural indicators	
	<ol style="list-style-type: none"> 1. Sets clear performance goals that are specific, measurable, attainable, relevant and time-bound 2. Conducts fair and objective performance appraisals based on transparent criteria and provides actionable and achievable points for development 3. Collaborates with individuals to create personalised development plans that address skill gaps, develop strengths and support career growth 4. Acknowledges and rewards outstanding performance to motivate and reinforce positive behaviours and achievements 	<ol style="list-style-type: none"> 1. Sets vague or unrealistic performance expectations, leading to confusion and lack of direction 2. Conducts appraisals which are biased or critical, leading to an unfair and demotivating process 3. Fails to invest in employee development and growth, resulting in stagnant skills and decreased job satisfaction 4. Shies away from difficult conversations or avoids responsibility for addressing poor performance 	

Conflict resolution	What is it?	The ability to identify a conflict and its underlying cause at an early stage, and facilitate open communication and de-escalate tensions to find mutually agreeable solutions.	
	Why is it important?	It maintains a safe and positive workplace, promotes healthy relationships and fosters collaboration by minimising the negative impact of conflict on individuals, teams and the overall business.	
	How does it help?	People who demonstrate this skill will be able to reduce workplace disruption and mitigate employment related risks, allowing teams to focus on achieving business goals.	
	Positive behavioural indicators		Negative behavioural indicators
	<ol style="list-style-type: none"> 1. Is actively involved in the team, so that conflicts and concerns are recognised and addressed before they become embedded or escalate 2. Listens carefully to all parties involved, seeking to understand their perspectives and concerns without judgement 3. Encourages collaborative problem-solving, where all parties work together to find mutually beneficial solutions 4. Demonstrates empathy and emotional intelligence to understand and manage emotions – including their own emotions – effectively during conflict situations 5. Recognises when assistance is needed from an independent party 		<ol style="list-style-type: none"> 1. Sees conflict resolution as the sole responsibility of the people directly involved, allowing conflicts to escalate and negatively impact wider relationships and productivity 2. Shows bias or favouritism towards certain individuals or outcomes, undermining the fairness and impartiality of conflict resolution 3. Adopts a win-lose mentality, where one party's interests are prioritised over finding mutually beneficial solutions

Leadership development	What is it?	The ability to identify and nurture leadership potential in others by offering opportunities and encouragement to develop essential leadership skills, competencies and behaviours, and by supporting career advancement.		
	Why is it important?	It ensures that capable individuals can fill key leadership positions when needed, enables employees to reach their full potential, enhances job satisfaction and engagement, and contributes to the success of a business and the Costs Lawyer profession by encouraging a culture of continuous learning and improvement.		
	How does it help?	People who demonstrate this skill will be able to make a valuable contribution to staff retention and recruitment, succession planning and people development to help their business grow and provide a high quality of service to clients.		
	Positive behavioural indicators		Negative behavioural indicators	
	<ol style="list-style-type: none"> 1. Seeks or creates relevant training opportunities for others to enhance professional capabilities 2. Identifies appropriate opportunities to allocate challenging tasks and responsibilities to stretch performance, promoting growth and the development of new skills 3. Appreciates and nurtures different types of talent and potential 4. Actively builds supportive relationships with colleagues at all levels 5. Creates a culture of professional development and continuous learning 		<ol style="list-style-type: none"> 1. Exerts excessive control and closely supervises team members, inhibiting their autonomy and growth 2. Fails to recognise and address individual development needs and aspirations, stunting professional growth 3. Provides insufficient feedback on performance and development areas 4. Blocks opportunities for growth and career advancement within the business 5. Builds a team that merely replicates the skills, traits or backgrounds of existing leaders 6. Prematurely rejects new ideas or innovations from more junior team members 	

Practising scenario 3: Business manager

Consider these skills if you:

- start a sole practice
- become a partner or director of an organisation
- become head of a practice group, office or team with responsibility for strategy or performance
- take on a role that involves business management or business development responsibilities
- have aspirations to do any of the above

Commercial awareness	What is it?	The ability to appreciate the business environment in which Costs Lawyers operate, including industry trends, market forces, financial considerations and client needs.	
	Why is it important?	It facilitates the provision of strategic advice and solutions that take account of financial and commercial implications for all stakeholders.	
	How does it help?	People who demonstrate this skill will be able to develop commercially sensible and viable solutions for clients and the business and add value that sets the practitioner apart.	
	Positive behavioural indicators	Negative behavioural indicators	
	<ol style="list-style-type: none"> 1. Demonstrates an understanding of key business concepts, financial metrics and market dynamics 2. Stays updated with industry trends, regulatory changes and new challenges that may impact the legal landscape and clients' businesses 3. Provides commercially sound recommendations 4. Actively seeks opportunities to enhance awareness, such as reading relevant publications, attending industry events or engaging in professional development activities 	<ol style="list-style-type: none"> 1. Fails to grasp the broader commercial context, limiting effectiveness in providing business-oriented advice 2. Overlooks significant changes or risks relevant to clients 3. Focuses solely on staying up to date with the law, disregarding the importance of staying up to date with relevant business trends and market developments 	

Business leadership and strategy	What is it?	The ability to inspire, guide and influence others by setting a clear strategic direction and then making appropriate decisions and effectively managing resources to oversee and deliver the agreed strategy.		
	Why is it important?	It ensures priorities are clearly communicated so efforts are focused on tasks that matter to the overall success of the business, while motivating employees through establishing a common purpose.		
	How does it help?	People who demonstrate this skill will be able to make a valuable contribution to building a successful and professional costs business that can adapt to challenges and engage with new opportunities while retaining focus on agreed priorities.		
	Positive behavioural indicators		Negative behavioural indicators	
	<ol style="list-style-type: none"> 1. Demonstrates a clear vision and effectively communicates it to the team and external stakeholders 2. Makes informed decisions based on careful evaluation of short-term and long-term implications 3. Recognises and mitigates key business and regulatory risks, including by establishing effective internal systems and processes 4. Appropriately staffs matters and utilises individuals' unique skills 5. Positions the team or business to adapt to change, embracing new ideas and technologies 6. Acts as a role model in upholding professional integrity and standards 		<ol style="list-style-type: none"> 1. Is indecisive or slow to react, leading to uncertainty and missed opportunities 2. Sets strategic objectives, but operates on a day-to-day basis without reference to them 3. Fails to properly resource the business' or team's various priorities 4. Operates in a silo 5. Is willing to overlook non-compliance or unethical conduct in pursuit of business objectives 	

Financial management	What is it?	The ability to effectively manage and control financial resources within the business including through budgeting, monitoring cash flow, analysing financial data and ensuring compliance with regulatory requirements.		
	Why is it important?	It creates financial stability and mitigates financial risks to the business and its clients, as well as supporting business growth by helping to identify opportunities for improvement and investment.		
	How does it help?	People who demonstrate this skill will be able to contribute to strategic planning and resource allocation within a team or across the business as a whole.		
	Positive behavioural indicators		Negative behavioural indicators	
	<ol style="list-style-type: none"> 1. Develops comprehensive financial plans aligned with the business' or team's strategic goals 2. Puts in place and oversees appropriate systems for maintaining accurate financial records and using appropriate accounting practices 3. Creates realistic budgets and regularly monitors financial performance against projections 4. Understands how to interpret information about the business' cost base, profit and loss position, fee-earner targets and other typical management information 5. Analyses financial data to identify trends, make informed decisions and drive improvements 6. Understands the parameters for compliance with financial regulations, internal controls and mitigating financial risks 7. Identifies and addresses gaps in financial knowledge 		<ol style="list-style-type: none"> 1. Fails to appreciate or address the nature of financial expertise required for their role 2. Neglects strategic financial planning, leading to inadequate resource allocation or financial instability 3. Keeps inadequate financial records, resulting in incomplete or unreliable financial information 4. Fails to create budgets or monitor financial performance, leading to poor financial control and decision-making 5. Creates cash-flow issues, for example through poor billing practices 6. Ignores financial regulations, leading to legal and reputational risks for the business and financial risks for clients 	

Change management	What is it?	The ability to adapt successfully to new external and internal circumstances, or implement improvements to existing approaches, generating enthusiasm and buy-in from others.		
	Why is it important?	Being open, flexible and capable of generating creative solutions will enable business growth and success by anticipating and preparing for change, staying ahead of emerging trends and fostering innovation while minimising unhelpful disruption.		
	How does it help?	People who demonstrate this skill will be able to improve systems and processes, and work through novel situations such as technological advancements, legal reforms and shifts in client expectations, in a way that ensures smooth business operations and fosters an open-minded working culture.		
	Positive behavioural indicators		Negative behavioural indicators	
	<ol style="list-style-type: none"> Embraces and promotes a culture of ongoing reflection and improvement, encouraging innovative thinking within the business Demonstrates the ability to adapt quickly to new circumstances, adjust strategies and processes, and effectively respond to evolving client needs and industry trends Takes a proactive approach to identifying and addressing challenges, and embraces creativity in problem-solving processes Is willing to take calculated risks, explore new opportunities and step outside of comfort zones to pursue innovative approaches and growth Maintains a positive attitude in the face of setbacks or failures, learning from experience and using it as fuel for continuous adaptation Is sensitive to the impact of change on others and generates enthusiasm and understanding around organisational changes 		<ol style="list-style-type: none"> Demonstrates reluctance or hesitancy in accepting and implementing necessary changes, hindering progress and innovation Works in isolation, not seeking input or feedback from others, and missing out on diverse perspectives that could stimulate creativity Imposes change on others without appropriate engagement and consultation Fails to recognise and properly manage the risks associated with change Neglects opportunities to invest in acquiring new skills and knowledge necessary for adaptation and creativity 	

The skills below – namely business development, marketing and customer service and client relationships – are interconnected. Effective coordination and alignment of these skills can lead to a comprehensive approach to business growth and success, whether at the team level, organisation level or for a sole practitioner.

Business development	What is it?	The ability to implement strategic initiatives to cultivate new business opportunities and enhance the overall growth and profitability of a business, by identifying and pursuing potential clients, expanding existing clients relationships and exploring avenues for revenue generation.		
	Why is it important?	By proactively seeking new opportunities and expanding their client base, Costs Lawyers can tap into new markets, increase their visibility and ensure their service offering is aligned to client needs.		
	How does it help?	People who demonstrate this skill will be able to identify and nurture new clients, partnerships and opportunities and adapt services to meet evolving demands, leading to increased revenue, improved market position and long-term sustainability.		
	Positive behavioural indicators		Negative behavioural indicators	
	<ol style="list-style-type: none"> 1. Actively seeks out networking opportunities and engages with potential clients and strategic partners to build relationships and generate leads 2. Identifies potential markets, unmet client needs and emerging trends to allow for strategic planning 3. Develops strong professional connections and encourages long-term relationships with clients, industry professionals and referral sources 4. Demonstrates clear and persuasive communication skills to articulate the values of the business and negotiate instructions 5. Is open to learning and adapting to changes in the costs landscape, staying updated on industry developments and enhancing expertise to better serve clients and identify new opportunities 6. Supports staff at all levels to engage in business development activities 		<ol style="list-style-type: none"> 1. Fails to articulate business development goals and strategies, leading to a lack of coordination and inability to measure success 2. Poorly prioritises business development activities, missing out on potential growth opportunities 3. Fails to understand client needs, not tailoring services to meet specific requirements, and lacking a client-centric approach in business development efforts 4. Has inconsistent or infrequent communication with clients or referral sources 5. Is dependent on a limited number of clients, creating potential revenue risks 	

Marketing	What is it?	The ability to understand the range of activities and efforts that can be used to promote a business' services, increase brand visibility and attract new clients.	
	Why is it important?	Marketing creates awareness about the services offered, establishes a strong brand presence and differentiates the business from competitors.	
	How does it help?	People who demonstrate this skill will be able to reach a wider audience, showcase expertise and attract potential new clients by communicating about service, value, professionalism and unique selling points.	
	Positive behavioural indicators	Negative behavioural indicators	
	<ol style="list-style-type: none"> 1. Develops a comprehensive marketing strategy aligned with business goals, target audiences and the competitive landscape 2. Creates a compelling brand identity, consistent messaging and a unique value proposition to help clients understand the business' offering 3. Understands client needs, preferences and trends to tailor marketing efforts effectively 4. Engages with indicators of quality, such as comparison websites, to help clients make informed choices 	<ol style="list-style-type: none"> 1. Publishes misleading or incomplete information about the business' services, undermining professionalism and risking poor client outcomes 2. Wastes resource on marketing initiatives that do not take into account the target market's needs, preferences and behaviours 3. Overlooks potential channels for audience engagement, such as social media 	

Customer service and client relationships	What is it?	The ability to establish and nurture positive connections with existing clients, ensuring clients' expectations around the service they will receive are met and often exceeded.	
	Why is it important?	Building and maintaining strong relationships with clients and delivering a high-quality service establishes trust, loyalty and a strong reputation through client satisfaction and referrals.	
	How does it help?	People who demonstrate this skill will be able to understand and respond to their clients' needs, deliver exceptional service and establish client loyalty, while enhancing the reputation of the Costs Lawyer profession.	
	Positive behavioural indicators	Negative behavioural indicators	
	<ol style="list-style-type: none"> 1. Proactively anticipates client needs and expectations and provides expert advice and guidance 2. Collaborates effectively with clients and experts to deliver solutions and adapts to changing circumstances to offer alternative options when necessary 3. Builds strong relationships with clients based on trust and reliability 4. Takes responsibility for mistakes or misunderstandings, promptly addressing any issues and offering appropriate resolutions 5. Maintains ethical standards and upholds professional integrity in all client interactions 6. Seeks feedback to assess client satisfaction and acts on that feedback to improve service delivery 	<ol style="list-style-type: none"> 1. Ignores client feedback, failing to reflect or change approach 2. Demonstrates a reactive approach to client needs, failing to manage expectations upfront 3. Is complacent in building a strong relationship with the underlying client when an instruction comes via a professional client, such as a solicitor or barrister 	