



LAW SOCIETY
OF IRELAND



Legal Services Excellence Standard (LSES)

TOOLKIT

July 2025



Introduction

The Legal Services Excellence Standard (LSES) was designed *by solicitors for solicitors* and accredited independently by the National Standards Authority of Ireland (NSAI).

It is a Law Society business support initiative that enables you to run your practice more efficiently, engage better with employees, sustain, and grow your practice, and future-proof for long-term sustainability and growth. LSES accreditation shows your clients that your service is performed to the highest standards of excellence.

To assist practitioners in applying for the Legal Services Excellence Standard (LSES) Law Society has identified a large range of resources to assist each practitioner in researching and applying for the standard. These resources are solely aimed at providing guidance and direction for practitioners to develop their own tailored and customised documents and evidence to assist in audit preparation for subsequent assessment in applying for the standard.

Law Society Practice Support recommends that each practitioner read and download the **Self-Assessment Checklist** to assist in developing their resources to apply for the LSES Standard.

For queries please contact: solicitorservices@lawsociety.ie

*Please note these resources are subject to change and are not meant to be exhaustive. The Law Society of Ireland can accept no responsibility for any practitioner's application for the Legal Services Excellence Standard.

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1.0 Business Planning, Development and Continuity

1.1 Mission Vision Values

Requirements: Can you provide evidence of a ‘mission, vision, values’ document?

- Can you provide evidence of a process document showing how the ‘mission, vision, values’ were arrived at?
- Can you provide evidence that the ‘mission, vision, values’ are publicly available?
- Can you provide evidence that staff are aware of the ‘mission, vision, values’?

Policy Statement Example: Our Firms mission, vision, and values guide our service Delivery, business decisions, and client relationships. These are communicated to all staff, reflected in our operations, and publicly available.

- **Mission:** We are committed to delivering clear, ethical, and client-centred legal advice.
- **Vision:** To be the trusted legal advisor of choice in our community.
- **Values:** Integrity, Excellence, Respect, Accountability, Collaboration.

Example Supporting Documents:

- Staff consultation record on mission, vision, and values development
- Internal training material
- Public version on website and office display

READ:



- Law Society [Guide How to write a business plan](#)
- Crowe Small Practice Support - [Small Practice Growth Strategy Workbook](#)
- Law Society Mission, Vision and Values [Client Care Service Statement](#)



INFORMATION SESSIONS:

- [Setting up in Practice - Practitioner Experiences](#)



LIBRARY RESOURCES:

- [Business Skills for lawyers](#)
- [Running a Solicitors' Practice](#)

1.2 Legal Structure

The firm maintains clear documentation on its legal structure, compliant with LSRA 2015.

Requirement:

- Can you provide evidence (if appropriate to your firm's structure) of a partnership agreement?
- Can you provide evidence (if appropriate to your firm's structure) of a limited liability partnership or reasons for not establishing this structure?
- Can you provide evidence (if appropriate to your firm's structure) of awareness of the provisions of the Legal Services Regulation Act 2015 (LSRA) relating to limited liability partnerships?

Example Supporting Documents:

- Partnership agreement or LLP certificate
- Legal structure rationale memo (if not LLP)
- LSRA provisions summary shared internally.

READ:



- [Legal Structure Partnership Agreement Template](#)
- Law Society [Information on Setting up Partnership](#)
- [LSRA Limited Liability Partnerships](#)



INFORMATION SESSIONS:

- [The LSRA and Limited Liability Partnerships](#)

1.3 Operational Structure, Human Resources Plan

The firm defines clear roles and ensures all staff are contracted and aware of colleagues' functions. Key firm information is securely documented.

Requirement:

- Can you provide evidence of documented roles and responsibilities of all working within the firm?
- Can you provide evidence that all staff are working under a contract?
- Can you provide evidence of staff awareness of the roles and responsibilities of other staff members?
- Can you provide evidence of a profile document that contains bank details, accountant's details, and other relevant details that would be necessary for a person to access in the event of the unexpected death of the principals of the firm?

Example Supporting Documents:

- Organisational chart
- Template employment contract.
- Role descriptions
- Key Information Profile (accountant, bank, passwords, etc.)



READ:

- Law Society [Member of Staff Contract Template](#)
- Create an [Organisation Chart](#)
- [10 steps to planning for disaster](#)

1.4 Financial Plan

The firm maintains short- and medium-term financial plans to ensure operational sustainability.

Requirement:

- Can you provide evidence of a financial plan in place for the next 12 months?
- Can you provide evidence of a strategic financial plan for the next three years?

Example Supporting Documents:

- 12-month operating budget
- 3-year financial forecast
- Financial planning assumptions

READ:



- [Growth Strategy Workbook](#)
- Financial Planning [Ready Reckoner Tool](#)

INFORMATION SESSIONS:



- [Financial Planning Top Tips](#)
- [Maximise Practice Profitability](#)

1.5 Business Development Plan

The firm maintains a strategic business development and marketing plan.

Requirement:

- Can you provide evidence of a business development plan in place for the next 12 months?
- Can you provide evidence of a website with up-to-date contact details?

Example Supporting Documents:

- Business development plan with goals
- Website audit log with latest updates
- Marketing activities calendar

READ:



- [Law Society Business Growth Options](#)
- [Law Society Small Practice Growth Strategy Workbook](#)
- [Law Society Marketing Workbook](#)
- [Marketing Plans and Growth Strategies](#)

INFORMATION SESSIONS:



- [Marketing Tips from Law Firm Marketing Club](#)
- [Moving Sales Online and Marketing Tips](#)
- [Practitioner Experience of Developing a Website](#)

1.6 Insurance

Maintain appropriate insurance coverages to manage risk and ensure business continuity.

Requirement / Evidence of (or rationale for non-cover):

- Employer's liability insurance,
- Commercial property insurance,
- Top-up PII (Professional Indemnity Insurance) cover,
- Business interruption insurance,
- Cyber-security insurance,
- Life insurance,
- Income protection insurance/keyman insurance,
- Serious illness cover.
- Can you provide evidence of professional indemnity insurance?
- Can you provide evidence of a Letter of Engagement showing the firm has limited its liability pursuant to section 26A of the Solicitors (Amendment) Act 1994 (section 48 of the Legal Services Regulation Act 2015) to the level of its professional indemnity insurance cover?

READ:



- [Insurance PII](#)
- [Law Society Sec 150 Guidance](#)
- [Law Society Sec 150 Precedents July 2021](#)

INFORMATION SESSIONS:



- [PII Special Purpose Fund](#)
- [Applying for PC Renewal 2024](#)

1.7 Leases, Plant and Equipment

Firm assets and leases are documented and reviewed regularly.

Requirement:

- Can you provide evidence of a folder containing all documentation and leases relating to its premises, plant, or equipment?
- Can you provide evidence of records of purchases and estimates for the date of replacement?
- Can you provide evidence of third-party data processor agreements, where required?

Example Supporting Documents:

- Asset inventory log
- Premises and equipment lease folder
- Replacement estimate spreadsheet.
- Processor agreements folder (GDPR compliance)



READ:

- Law Society GDPR [Guidance and templates](#)
- Law Society [GDPR Firm Processor Template](#)

1.8 Measurement and Review of Targets

Firm tracks business and individual performance through structured reviews.

Requirement:

- Can you provide evidence of a documented performance-management plan?
- Can you provide evidence that a disaster-recovery policy has been implemented and is tested periodically?

Example Supporting Documents:

- Annual KPI sheet
- File review form
- Disaster recovery policy
- Test records



READ:

- Law Society [performance-time-management-march2020.pdf](#)
- Law Society [Performance Management Template.docx](#)
- Law Society [Guidance and Ethics Supports](#)
- Law Society [Precedents and other Supports](#)

1.9 Business Interruption Disaster and Business Continuity

The firm maintains and tests a disaster recovery plan and ensures critical data is backed up off-site.

Requirement:

- Can you provide evidence that data is backed up, stored off-site, and available if the firm premises are damaged or destroyed?
- Can you provide evidence that the partnership agreement deals with situations where a partner in the firm is unable to continue to act due to ill health or death?
- Can you provide evidence that, in the case of a sole practitioner, an alternate has been identified who will manage the running or closure of the firm in the event the sole practitioner is unable to do so?

Example Supporting Documents:

- Backup log
- Sole practitioner alternate agreement
- Emergency access protocol
- Partnership agreement clause on incapacity/death

READ:



- Law Society [10 Steps for Planning for disaster](#)
- Law Society [Emergency succession planning in a sole practitioner's or principal's firm – second edition](#)
- Law Society [Legal Structure Partnership Agreement Template](#)
- Law Society [Legal Agreement providing for temporary management of sole practitioner/principal](#)

1.10 Succession Planning

Succession planning ensures firm continuity and client security in the event of leadership change.

Requirement:

- Can you provide evidence that an orderly succession plan in place, in the event of retirement, mental incapacity, or death?
- Where the firm is a partnership, can you provide evidence that each partner has a will that is consistent with the firm's partnership agreement?
- Where the firm is a sole practitioner or a firm principal who has no equity partners, can you provide evidence that:
 - The sole practitioner/principal has a will that appoints a practice trustee,
 - The sole practitioner/principal has agreed in writing with another holder of a practising certificate that they will agree to be nominated to carry on the firm's practice for the purposes of section 31(2) of the Solicitors (Amendment) Act 1994.

Example Supporting Documents:

- Succession plan document
- Partner wills with firm provisions
- Section 31(2) nominee agreement
- Practice trustee appointment document

READ:



- Law Society [Guidance and Ethics 4th Ed Succession Planning](#) (page 115)
- Law Society [Making a Will](#)
- Law Society [EPA Guidance Practice Note](#)
- Law Society [Legal Agreement providing for temporary management of sole practitioner/principal](#)



INFORMATION SESSIONS:

- [Thinking of Retiring: What are your options?](#)

2.0 Infrastructure

2.1 Operational Systems Management

The Firm maintains and documents systems for practice and case management, accounting and Staff IT training to ensure efficient and compliant operations.

Requirements:

Can you provide evidence of the following:

- Practice management system,
- Computerised accounting solution,
- Training in use of case management systems,
- Training in use of accounting systems,
- Training of staff in software systems such as Microsoft Word, Microsoft Excel, or alternatives,
- Training of staff in email etiquette.

Example Supporting Documents:

- Practice Management Software overview and contract
- Computerised accounting system, user manual, access logs.
- Staff training records on use of Practice Management software and accounting system.
- Staff training schedule for Microsoft or alternatives and email etiquette training guide / attendance log.

READ:



- Law Society [Benefits of a case management system](#)
- Law Society [Case Management Systems Practical Advice](#)



INFORMATION SESSIONS:

- [Review Case Management Systems](#)

2.2 Regulatory requirements relating to firm data

Firm maintains procedures and training to meet regulatory requirements including GDPR policies and procedures demonstrating compliance with the [Law Society of Ireland '12 Steps' programme](#), accounting, confidentiality and AML.

Requirements:

Can you provide evidence of the following:

- GDPR policies and procedures demonstrating compliance with the Law Society of Ireland '12 Steps' programme,
- Retention policies and procedures created in line with Law Society guidance,
- Accounting policies and procedures in line with regulatory requirements,
- Office policies and procedures on client confidentiality,
- Policies and procedures demonstrating compliance with AML (Anti Money Laundering).

Example Supporting Documents:

- GDPR Compliance Folder (Checklist, processing agreements, staff awareness and training)
- Document retention policy and register
- Accounting policies, procedures and compliance records.
- AML Policy, risk assessment template and training.

READ:



- Law Society [Anti Money Laundering Guidance and Resources](#)
- Law Society [Solicitor Accounts Regulations 2023](#)
- Law Society Archive [Retention of Files](#)
- Law Society Practice Note [Legal Professional Privilege](#)

2.3 Data Security and Management

The Firm protects data through proactive threat modelling, encryption, access control and staff training.

Requirements:

Can you provide evidence of the following:

- Threat model for the firm,
- Information security policies and procedures based on the information security checklist,
- Firm's communications are encrypted where possible and sensitive information is always password protected if sent by email,
- Appropriate firm training sessions on information security delivered to employees.

Example Supporting Documents:

- IT Threat Model and Mitigation Strategy
- Information security policy aligned with the Law Society Checklist
- Encryption and password protection and protocols for email usage.
- Staff training tracker and content.

READ:



- Law Society [10 steps in managing data and data protection in your firm](#)
- Law Society [Quick tips for ensuring confidentiality in the use of technology](#)
- Law Society [Cybersecurity Fundamentals](#)
- Law Society [Cyber Security poster](#)



INFORMATION SESSIONS:

- [Cyber Security & Technology Tools to Protect Your Office](#)
- [How Secure Is Your Office Front Door?](#)

2.4 Confidentiality Policies

The firm has robust confidentiality through legally binding agreements and staff engagement.

Requirements:

Can you provide evidence of the following:

- Employee contracts include confidentiality provisions and are robust,
- Non-employee personnel contracts include confidentiality provisions and are robust,
- Training on firm's confidentiality policies.

Example Supporting Documents:

- Employee Contracts with Confidentiality Clauses.
- Contractor Agreements with Confidentiality Clauses.
- Confidentiality training tracker and content.



READ:

- Law Society Member of Staff Contract Template including Confidentiality Clause.
- Law Society Guidance and Ethics 4th Ed Privilege and Confidentiality between solicitor and Client (page 49-58).

2.5 Communication Procedures

Requirements:

Can you provide evidence of the following:

- Acceptable use policy for email, social media, and intranet usage.
- Stationary meets regulatory and best practice guidance,
- Employees have received communications-policy training.

The firm sets expectations on acceptable use of digital tools and ensures all communication channels meet compliance and quality standards.

Example Supporting Documents:

- Acceptable usage policy (Email, social media, Internet)
- Firm Stationery and compliance checklist
- Communication training tracker and content.

READ:



- Law Society [Guidance and Ethics 4th Ed Professional Names and Professional Note paper](#) (page 108-112)
- Law Society [Guidelines solicitors advertising regulations](#)
- Law Society [Practising Law Society Member Logo](#)
- [Disclaimer Template](#)
- [Privacy Policy Template](#)
- [Terms & Conditions Template](#)

3.0 Operational Systems - Client Care

3.1 Quality Assurance Policy

The firm is committed to a consistent, high standard of client service through a structured client care policy embedded in daily work.

Requirements:

Can you provide evidence of the following, which the client care policy should include:

- How enquiries from potential clients will be dealt with confidentially,
- Ensuring that, before taking on a client, the department has sufficient resources and competence to deal with protecting client confidentiality, including their data protection rights,
- A timely response is made to telephone calls and correspondence from the client and others,
- A procedure for referring clients to third parties,
- Client care policy has been communicated to staff,
- Client feedback has been sought,
- File review and actions arising,
- Peer review can be demonstrated,
- Recording of key client information.

Example Supporting Documents:

- Client care policy with procedures for onboarding, referral, and communication.
- Confidential enquiry handling guidelines.
- Staff communication training.
- Peer review and file review procedures.
- Client feedback form and log.
- Standardised file-opening and client information sheet.

READ:



- Law Society [Developing and preserving positive client relationships](#)
- Law Society [Leaflet - Handling complaints and support tools available](#)
- [Ten tips for client care](#)

3.2: Managing Clients' Expectations

Client engagement is transparent and compliant with legal obligations, with clear expectations set at the outset.

Requirements:

Can you provide evidence of the following:

- Compliance with section 150, data privacy, consent, and AML,
- Submission of client care statement to clients,
- Use of disengagement letters.

Example Supporting Documents:

- Section 150 compliance letter
- Consent and data privacy form
- AML verification checklist
- Disengagement letter templates
- Client engagement workflow

READ:



- Law Society [Section 150 Precedent Letters](#)
- Law Society [Client Care Leaflets](#)

3.3 Communications with Clients

Communication with clients is consistent, prompt, and aligned with their preferences.

Requirements:

Can you provide evidence of the following:

- A policy on firm style,
- Firm has asked client about preferred methods and time of communication,
- Firm has committed to a response time for client queries and has a system for flagging when clients have not received a response within that timeframe,
- Staff are aware of above policies.

Example Supporting Documents

- Style guide for all client correspondence
- Client communication preference form
- Client response timeframe policy (e.g., 24–48 hrs)
- Reminder/flagging system within case management
- Staff training log on communication protocols



READ:

- Law Society [Developing and preserving positive client relationships](#)
- Law Society [Solicitors Guide to clear writing](#)
- Law Society [Managing challenging clients](#)

3.4 Vulnerable Clients

Requirements:

Can you provide evidence of the following:

- Firm has documented whether it deals with, or is likely to deal with, vulnerable clients,
- A vulnerable client communication policy in place.

Example Supporting Documents

The firm recognises and responds sensitively to vulnerable clients' needs.

- Assessment form for vulnerable clients
- Vulnerable client communication policy
- Staff awareness training log
- Adjusted client service procedures (e.g., plain language use)

READ:



- Law Society [Guidance and Ethics 4th Ed Chapter 2](#) page 27-29
- Law Society [Dealing with Vulnerable Clients](#)
- Law Society [Solicitors Guide to clear writing](#)

3.5 Conflict Checks

Conflicts of interest are identified early and managed in line with professional obligations.

Requirements:

Can you provide evidence of the following:

- Carrying out of conflict checks,
- Staff training re conflicts of interest.

Example Supporting Documents

- Conflict check register template.
- Conflict checks procedure (at enquiry and engagement)
- Staff training attendance and materials



READ:

- Law Society [Guidance and Ethics 4th Ed Chapter 3](#) page 35

3.6 Credit Control and Risk Assessments

The Firm monitors and manages financial risk, undertakings, and critical deadlines to protect firm and client interests.

Requirements:

Can you provide evidence of the following:

- An undertakings policy,
- Undertakings register,
- A critical dates policy,
- Critical dates register or a practice management system that manages critical dates,
- Wills register,
- Client complaints register,
- Deeds register,
- Firm carries out 'Know Your Client' (KYC) and AML procedures in lines with its documented policies,
- A credit control action plan that includes setting credit limits for clients, risk assessment re credit limits, collections policy, and monitoring of accounts receivable and outlays.

READ:



- Law Society [Undertaking Register](#)
- Law Society [Critical Dates management](#)
- Law Society [Wills Instruction Sheet Template](#)
- Law Society [Anti Money Laundering obligations for Solicitors](#)
- Law Society [Anti Money Laundering Guidance and Resources](#)

4.0 Human Resources, Competence & Knowledge Management

3.1 Human Resource Management

HR processes ensure team alignment, performance management, and fair feedback.

Requirements:

Can you provide evidence of the following: *** (Not applicable if there are no staff)*.

- The firm has allocated HR responsibilities,
- **** Staff performance targets/measures are in place for all roles, which are regularly reviewed and linked to the overall firms' performance,
- **** Staff feedback initiatives,
- Evidence of internal mentoring schedules, where appropriate.

Example Supporting Documents

- Staff performance plan linked to firm goals.
- Staff feedback form or survey template
- HR responsibilities matrix

READ:



- Law Society [Human Resources \(HR\)](#)
- [Performance Management guideline](#).

4.2 Staff Resource Planning and Recruitment

All recruitment is carried out with fairness, compliance, and transparency.

Requirements (Not applicable if there are no staff)**

Can you provide evidence of the following:

- A recruitment policy is in place that includes:
- The identification of vacancies,
- The drafting of the job documentation,
- Methods of attracting candidates,
- Clear and transparent selection,
- Storage, retention, and destruction of records,
- References and ID checking,
- Where appropriate, the checking of disciplinary records.

Example Supporting Documents

- Job description template
- Candidate selection criteria
- Recruitment process log
- ID, and reference checks form
- GDPR-compliant data retention protocol

READ:



- Law Society [Human Resources \(HR\)](#)
- Law Society [Dignity at Work Toolkit](#)

4.3 Staff Induction

New staff receive a structured introduction to the firm's operations, values, and systems.

Requirements: ** (Not applicable if there are no staff).

- A staff induction policy,
- A policy in place for personal and further development of staff,
- Implementation of a staff induction policy.

Example Supporting Documents

- Induction checklist
- Development plan template
- Signed completion form for each new starter.



READ:

- Law Society [Staff Induction Guidance](#)

4.4 Professionalism and Recognition

The Firm fosters personal and professional development through training, recognition, and growth opportunities.

Requirements: ^{}(Not applicable if there are no staff).**

- A policy in place for personal and further development of staff.
- Implementation of a staff development policy.

Example Supporting Documents

- Staff development policy
- Training request and approval form
- Performance review form with CPD alignment

READ:



- [Performance Management guideline.](#)
- [Performance and Time Management](#)

4.5 Effective Internal Communications

Effective internal communication underpins collaboration, clarity, and consistency.

Requirements:

Can you provide evidence of the following:

- Employees are clear on the communication etiquette when dealing with internal and external communications. There is a list of channels available.

Example Supporting Documents

- Internal communication protocols guide
- Communication channels list (email, Teams, WhatsApp, etc.)
- Etiquette guide for internal and external messages

4.6 HR Processes, Policies and Procedures

HR policies are regularly reviewed, updated, and effectively communicated to all team members.

Requirements:

Can you provide evidence of the following:

- Policies are in place and are reviewed and updated annually,
- A process is in place to make adjustments to policy within a reasonable timeframe, as the need arises,
- Policies have been communicated and there is an effective process in place to communicate updated policies,
- Employees have a clear understanding of the policies and where to access them.

Example Supporting Documents

- Annual review calendar
- Policy updates communication tracker
- Staff confirmation form for policy receipt

4.7 Health, Psychological Safety and Wellbeing

The firm promotes a culture of wellbeing and psychological safety within the firm.

Requirements: *** (Not applicable if there are no staff).*

- A policy covering health, psychological safety, and wellbeing,
- Employees are encouraged, supported, and participate in wellbeing initiatives,
- Signing the Law Society's Professional Wellbeing Charter has been considered,
- Employees can give examples of good supports that are in place for their wellbeing (such as EAP training and education etc)

Example Supporting Documents

- Wellbeing policy
- Staff participation in wellbeing programmes (log)
- EAP information (Employee Assistance Programme)
- Professional Wellbeing Charter review status

READ:



- Law Society [Human Resources \(HR\)](#)
- Law Society [Dignity at Work Toolkit](#)
- Law Society [Legal Mind](#)

4.8 Diversity, Equality, and Inclusion

The firm is committed to fostering a diverse, inclusive, and equitable workplace.

Requirements: *** (Not applicable if there are no staff).*

- A diversity, equality, and inclusion policy in place,
- Staff awareness of diversity, equality, and inclusion policy,
- Signing the Law Society's Gender Equality, Diversity, and Inclusion (GEDI) charter has been considered.

Example Supporting Documents

- DEI (Diversity, Equality, and Inclusion) policy document
- GEDI (Gender, Equality, Diversity, and inclusion) charter review status
- DEI awareness training log



READ:

- Law Society [Gender Equality, Diversity and Inclusion](#)

4.9 Professional Development to include mentoring and CPD.

The firm ensures legal professionals maintain their competence through structured CPD tracking and encouragement of continuous learning.

Requirements:

Can you provide evidence of the following:

- Participation in professional development training,
- Evidence of a central record of CPD.

Example Supporting Documents:

- CPD tracking spreadsheet.
- CPD attendance certificates file
- Annual development goal form



READ:

- Law Society [2025 Cycle](#)

4.10 Learning and Development Evaluation and Planning

The firm supports long-term learning through planned investment and firm-wide development planning.

Requirements:

Can you provide evidence of the following:

- Managers/partners can demonstrate evidence of long-term planning of learning and development for their employees through budget allocations and employee training approval documentation.
- Managers/partners can provide examples of how the organisation supports continuous learning (for example, scheduled CPD days, CPD attendance records).

Example Supporting Documents

- Training budget records
- CPD scheduling tracker.
- Staff learning feedback form.



READ:

- Law Society [Human Resources \(HR\)](#)

4.11 Knowledge Resource Management (Library, precedents, templates)

All team members have access to appropriate knowledge tools, libraries, and precedents.

Requirements:

Can you provide evidence of the following:

- Employees can demonstrate evidence of access to professional development resources/legal library/legal research tools for all staff.

Example Supporting Documents

- Access logs to legal library or digital platforms
- Precedents folder structure
- Template library index.



READ:

- [Practice Areas](#)
- [Practice Notes](#)
- [Precedents](#)
- [Buy publications](#)



LIBRARY RESOURCES:

- [Library](#)



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