FOR LAW FIRMS

The law firm’s checklist pack

Every law firm’s checklist in one document: choosing a recruiter, fees and exclusivity, writing an honest advert, keeping staff and CILEX hires.

8 checklists. Print it, tick as you go, or keep it on your phone.

Every checklist comes from a Wilson Mannion Insights article, with its sources. The newest article in this pack was checked 22 October 2026.
No sign-up and no cost. Wilson Mannion Recruitment Ltd, 0121 661 3617, info@wilsonmannion.co.uk.

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FOR LAWYERS AND LAW FIRMS

Before you accept, or change, a caseload

From our article: **How many live files is too many? Conveyancer caseloads explained**

Read it in full, with the sources for every figure: https://www.wilsonmannion.co.uk/insights/how-many-live-files-is-too-many-conveyancer-caseloads

Checked 22 October 2026. General information, not legal advice.

IN SHORT

There is no official number of live files that is too many for a conveyancer. The right figure depends on the type of work, the systems and whether there is an assistant, so the useful test is whether files are moving and the person can cope. Count your real caseload, then ask any firm for its number, not a description.

Key takeaways

- No regulator, professional body or survey we found gives a safe number of live files per conveyancer.
- The number that matters is yours: how many files, of what type, with what support, and whether they are moving.
- Ask every firm for its figure per fee earner and whether there is an assistant. A firm that will not say is telling you something.
- Firms should track files per person, stalled files and hours worked, not just completions.

Before you accept, or change, a caseload

- [ ] I know what the firm counts as a live file.
- [ ] I have the number per fee earner, not an average.
- [ ] I know the mix: resale, new build, remortgage, leasehold, commercial.
- [ ] I know who the assistant is and what they handle.
- [ ] I have seen the case management system.
- [ ] I know what happens at peak times.
- [ ] I know who covers my files when I am away.
- [ ] I have a named supervisor and review dates.
- [ ] I have counted my own caseload using one rule, and I will repeat it monthly.

Count your caseload in five steps

1. **Pick a rule**
   Decide what counts as live and write it down. Include stalled files and post-completion files, but count them separately.
2. **Count by type**
   Split the total into resale, purchase, remortgage, new build, leasehold and anything else. Fifty mixed files is not fifty of one kind.
3. **Mark the stalled**
   Note which files have not moved in a fortnight and why: the other side, the lender, the client, or you.
4. **Note the support**
   Write down who helps on these files, and how many hours a week.

5 **Compare**
Put today's count next to last quarter's and next to the figure you were given when you joined.

Reading the answer

QUESTION	IF YES	IF NO
How many live files does each fee earner carry, and how has it changed in a year?	A number and a trend, for example "about the same as last year". That is a firm that tracks it.	A phrase such as "busy but manageable". Ask again, and treat a second dodge as the answer.
Is there an assistant or file handler on these files?	Ask who opens files, chases searches and does post-completion work. A named person is a good sign.	If you will do it all yourself, ask what the count assumes about your time.
Which case management system, and who built the reminders?	A named system and a person who owns it. Ask for a short demonstration.	If files are tracked in spreadsheets, ask how stalled files are spotted.
What happens at peak times?	A plan: overflow cover, a resourcing review or a freeze on new instructions.	"Everyone pulls together" is not a plan. Ask what the last peak looked like.
Who covers your files during holiday or sickness?	A named colleague and a handover habit.	Nobody. Ask whether you would return to a pile.

FOR LAW FIRMS

Questions for the first meeting

From our article: **How to choose a legal recruiter: a checklist for law firms**
Read it in full, with the sources for every figure: https://www.wilsonmannion.co.uk/insights/how-to-choose-a-legal-recruiter-checklist-for-law-firms
Checked 22 October 2026. General information, not legal advice.

IN SHORT

Choose a legal recruiter who knows your practice area, gives you one named contact and puts terms in writing before any CV is sent. Check the track record with references you can ring, and ask how candidates are screened and how your firm's name is handled. Then test two agencies on one live role and compare the whole terms, not the fee alone.

Key takeaways

- A good legal recruiter knows your practice area, gives you one named contact and shows you terms in writing before any CV is sent.
- Judge on references you can ring, how candidates are screened and how your firm's name is handled. A wall of logos proves little.
- Test two agencies on one live role. Then compare the full terms and the shortlist. The fee is one line of several.
- UK law sets a floor for agencies and does not cap what they charge. The REC Code adds standards, but only for its members.

Questions for the first meeting

- [ ] Who will look after our role, and how do I reach them?
- [ ] Which practice areas do you recruit in, and which roles have you filled in ours?
- [ ] Who are two clients in our practice area I can call?
- [ ] Who speaks to each candidate before a CV reaches us, and what do they check?
- [ ] Has each candidate agreed to be put forward to us by name?
- [ ] When is our firm named to a candidate?
- [ ] How will you advertise our role, and who approves the advert?
- [ ] What is the fee, what does it cover and when is it due?
- [ ] What happens if the hire leaves, and from which date?
- [ ] What does the market say about this role at our pay and working pattern?
- [ ] What will you do if two agencies send the same candidate?
- [ ] How will you handle the role if it is confidential?

How to run the test

1. **Pick a real role**
   Choose one you need filled, not a trial vacancy. For a conveyancing role, write the advert first so the brief is clear.

2. **Brief it in writing**
   Pay, working pattern, caseload, supervision and who the candidate will meet. A vague brief returns a vague shortlist.
3. **Ask for the market read first**
   What the market holds at your pay, before any CV. Note whether you hear anything you did not want to hear.
4. **Judge the shortlist on fit**
   Count the CVs that meet the points you set. Three that fit beat fifteen that do not.
5. **Ask what candidates were told**
   A candidate will tell you how the call went and what was said about your firm.
6. **Decide, then widen or stop**
   If the first shortlist fits, extend the brief. If it does not, you have lost a week, not a quarter.

FOR LAW FIRMS

Questions to ask before you sign

From our article: **Recruiter exclusivity and rebates: what to ask before you sign**

Read it in full, with the sources for every figure: https://www.wilsonmannion.co.uk/insights/recruiter-exclusivity-and-rebates-what-to-ask-before-you-sign

Checked 22 October 2026. General information, not legal advice.

IN SHORT

Before you sign a recruiter's terms, find out what counts as an introduction and how long it lasts, whether you are tied to one agency and exactly when a rebate is due. Get the fee base, payment dates and CV rules in writing before any CV is sent. The right terms depend on the role and the firm, so compare two sets on one real salary.

Key takeaways

- Read the definition of an introduction, the introduction period, the rebate conditions and any exclusivity before you read the fee.
- There is no standard fee, rebate or exclusivity clause. The right terms depend on the role and the firm.
- UK law does not set what you pay a permanent-placement agency, and the REC says agencies are not legally required to offer refunds.
- Get terms in writing before any CV is sent, and ask a solicitor to read them.

Questions to ask before you sign

- [ ] What counts as an introduction, and how is it recorded?
- [ ] How long is the introduction period, and does it ever restart?
- [ ] Is the fee on salary or on package, and what counts as package?
- [ ] Is there a minimum fee?
- [ ] When is the invoice due, and can it be paid in instalments?
- [ ] Is any part of the fee paid before a hire, and is it refundable?
- [ ] What is the rebate schedule, week by week?
- [ ] Is it a refund or a replacement, and who chooses?
- [ ] What must I do to claim, and by when?
- [ ] What happens if the replacement also leaves?
- [ ] Is there any exclusivity, for which roles and for how long?
- [ ] What do you commit to in return, and can I leave if you miss it?
- [ ] How will CVs reach us, and has each candidate agreed to be put forward?
- [ ] Is the non-solicitation clause mutual?

Should you agree exclusivity on this role?

QUESTION	IF YES	IF NO
Is it a role an advert alone is unlikely to fill?	A limited exclusive or a retained search can make sense. Agree a period, a shortlist date and an exit.	Stay contingent. Use more than one agency if you wish, with a rule for duplicate CVs.
Has the agency read the role and told you what the market holds?	It has earned the conversation. Ask for exclusivity in writing, for this one role.	Do not agree yet. Ask for the market read first.
Will it commit to something in return?	Put it in the terms: a named contact, a shortlist date, no advert without your approval.	Treat exclusivity as a request, not a trade.
Can you leave if there is no shortlist by an agreed date?	Good. Write the date down.	Do not sign.

FOR LAW FIRMS

Before you agree any fee

From our article: **How much do legal recruitment agencies charge? UK fees explained**
Read it in full, with the sources for every figure: https://www.wilsonmannion.co.uk/insights/how-much-do-legal-recruitment-agencies-charge
Checked 22 October 2026. General information, not legal advice.

IN SHORT

There is no standard fee. Legal recruitment agencies usually charge a percentage of the hire's first-year salary, and a 2020 directory listed rates from 17% to 35%. The rebate, the definition of salary and the introduction period change the real cost as much as the percentage does.

Key takeaways

- There is no standard fee. Published rates differ by agency, by salary band and by date.
- Most agencies charge a percentage of first-year salary. Ask what counts as salary, and whether VAT is on top.
- The rebate, the introduction period and any payment before a hire change the cost as much as the percentage.
- Compare two quotes on one real salary, with three scenarios: the hire stays, leaves early or leaves late.

Before you agree any fee

- [ ] The fee rate, and what it is a percentage of.
- [ ] What counts as salary, including bonus, benefits and car allowance.
- [ ] Whether VAT is included in the quote.
- [ ] The minimum fee, any deposit and any cancellation fee.
- [ ] When the invoice is due and whether instalments are allowed.
- [ ] The rebate schedule, week by week, and what I must do to claim.
- [ ] Whether the remedy is a refund or a replacement, and who chooses.
- [ ] The introduction period, and what counts as an introduction.
- [ ] Any exclusivity: which roles, how long and how I leave.
- [ ] What checks the agency will and will not carry out.

FOR LAW FIRMS

What to put in writing for each fee earner and assistant

From our article: **How to keep conveyancers from leaving: causes, costs and fixes**
Read it in full, with the sources for every figure: https://www.wilsonmannion.co.uk/insights/how-to-keep-conveyancers-from-leaving
Checked 22 October 2026. General information, not legal advice.

IN SHORT

Conveyancers usually leave over caseload, thin supervision, pay that has drifted, a progression route nobody wrote down, weak systems or how the firm treats people. Most of these show months before a resignation if you count files, hours and stalled matters and ask people what would make them go. The only legal-sector replacement cost we found dates from 2014, so work out your own with the bad hire calculator.

Key takeaways

- Conveyancers leave for a handful of reasons, and a firm controls most of them.
- We found no published turnover rate for conveyancers. Count your own: files per person, stalled files and hours worked.
- LawCare's 2025 survey found 56.2% of respondents across the legal sector could see themselves leaving their workplace within five years.
- The only legal-sector replacement cost we found dates from 2014. Use the bad hire calculator with your own numbers.
- Ask people what would make them leave while there is time to act. Write down what you will do.

What to put in writing for each fee earner and assistant

- [ ] The title of the next role, in one line.
- [ ] The things the person must show to reach it, in plain words.
- [ ] Whether the role exists today, or would be created, and who decides.
- [ ] A review date, not "in due course".
- [ ] The pay range for the next role, if you can share it.
- [ ] The supervision or training needed first, and who gives it.
- [ ] Who the person talks to if the date slips.
- [ ] A short note of the conversation, shared with the person.

How to run a stay interview

1. **Choose the time**
   A planned one-to-one, away from a completion day. It is not a performance review.
2. **Ask open questions**
   What do you look forward to? What would make you leave? What would you change about your files? What do you need from your supervisor? Where do you want to be in two years?

3. **Name one action**
   Before the meeting ends, say what you will do and by when.
4. **Write it down**
   Send a short note afterwards so the person can see it was heard.
5. **Do it, then report back**
   Check at the date you gave, and tell them what happened.

Six steps for this month

1. **Count caseloads by person**
   Put each fee earner's live files, by type, next to the number they were hired for.
2. **Name every supervisor**
   Give each junior a named supervisor, fixed review dates and a supervisor whose targets allow the time.
3. **Check pay against live adverts**
   Use the jobs page and the salary guide. Note the date of each person's last review.
4. **Write the route up**
   For every fee earner and assistant, put the next role, criteria and a review date in writing.
5. **Hold stay interviews**
   Ask each person what would make them leave. Say what you will do, and do it.
6. **Fill the role or say why not**
   Tell the team when a vacancy will be filled, or what you will do until it is.

FOR LAW FIRMS

Before you publish a conveyancer advert

From our article: **How to write a conveyancer job advert that gets applications**
Read it in full, with the sources for every figure: https://www.wilsonmannion.co.uk/insights/how-to-write-a-conveyancer-job-advert
Checked 22 October 2026. General information, not legal advice.

IN SHORT

A conveyancer advert that gets applications names the role, the place, the pay band, the working pattern in days, the work in files and systems, who supervises and what happens next. Leave out any wording that points to an age, a sex or another protected characteristic under the Equality Act 2010, and describe the competence you need instead. Pay matters: in CV-Library's August 2026 survey, 41% of 1,043 UK jobseekers said they would not apply without salary information.

Key takeaways

- Put the role, place, pay band and working pattern in days in the first lines.
- Describe the work in files and systems, name who supervises, and say what happens after someone applies.
- Leave out wording that points to an age, a sex or another protected characteristic. Describe what the person must be able to do.
- The Equality Act 2010 applies to your advert. If an agency advertises for you, regulation 27 applies to the agency.
- Set a review date. Take the advert down when the role is filled.

Before you publish a conveyancer advert

- [ ] The title names the level and the work.
- [ ] The place is a town.
- [ ] The pay is a band for this role.
- [ ] The working pattern is in days.
- [ ] The work is described in files, systems and support.
- [ ] The supervisor's role is named, and so is who the person would supervise.
- [ ] The qualifications you will consider are listed.
- [ ] The next role is named, in one sentence.
- [ ] Nothing in it points to an age, a sex or another protected characteristic.
- [ ] It says who reads applications and when they reply.
- [ ] It has a review date in your diary.

How to keep an advert honest

1. **Set a review date**
   Choose a date when you publish, such as two weeks out. It is our suggestion, not a rule.
2. **Reply to everyone**
   Acknowledge each one and say when they will hear.

3. **Update when facts change**
   If the pay band, the days or the supervisor changes, change the advert the same day.
4. **Close when an offer is accepted**
   Not when the person starts. Take down every copy, including a recruiter's.
5. **Say so if you are only talking**
   If there is no vacancy yet, write that plainly.

Is the advert ready to publish?

QUESTION	IF YES	IF NO
Do you know the live files per fee earner?	Put the figure and your counting rule in the advert.	Count them before you advertise. A guess in print becomes a promise.
Is the pay band agreed?	Show it.	Do not advertise yet. A role without an agreed budget may not be a role.
Does the supervisor have time?	Say who they are and what they carry.	Fix that first, or say what support is in place.

FOR LAWYERS AND LAW FIRMS

Before you accept a conveyancing role

From our article: **What does a conveyancer do, and what do they earn in the UK?**
Read it in full, with the sources for every figure: https://www.wilsonmannion.co.uk/insights/what-does-a-conveyancer-do-and-what-do-they-earn
Checked 22 October 2026. General information, not legal advice.

IN SHORT

A conveyancer handles the legal side of buying or selling property in England and Wales, from the draft contract to exchange, completion and registering the new owner. Published pay varies: the National Careers Service gives £25,000 for a starter and £65,000 for an experienced licensed conveyancer, and a July 2026 recruiter guide gives £45,000 to £75,000 at three years PQE and over. Pay moves with level, region, caseload and supervision duties.

Key takeaways

- A conveyancer runs the legal side of a sale or purchase, from the draft contract to registering the new owner at HM Land Registry.
- You can get there as a solicitor, as a licensed conveyancer regulated by the Council for Licensed Conveyancers, or with CILEX conveyancing practice rights.
- Published pay ranges differ by thousands of pounds. The National Careers Service gives £25,000 to £65,000. A July 2026 recruiter guide gives £45,000 to £75,000 at three years PQE and over.
- Level, region, caseload and supervision duties move pay more than the job title does.

Before you accept a conveyancing role

- [ ] I know the pay, and which level and region it matches.
- [ ] I have the working pattern in writing, including any hybrid days.
- [ ] I know how many live files I would carry and what the firm counts.
- [ ] I know who supervises me and how often we meet.
- [ ] I know my notice period and when I could start.
- [ ] I know the route to the next level and who decides it.
- [ ] The offer is in writing and matches what I was told.

A purchase, from instruction to registration

1. **Take instructions**
   The client instructs the firm. The conveyancer explains the stages, the costs and who does what.
2. **Review the draft contract**
   The seller's side drafts the contract. The buyer's conveyancer reads it and checks who owns the property.
3. **Raise enquiries**
   The buyer's conveyancer puts questions to the seller's side. The seller helps answer them, and details are negotiated if needed.
4. **Order searches and deal with the lender**
   Searches are arranged and paid for. Any mortgage lender's requirements are dealt with.

5. **Report to the client**
   The conveyancer advises the client on what was found and what the documents mean.
6. **Exchange contracts**
   Both sides sign and swap final copies. The agreement to buy and sell becomes legally binding, and the contract sets the completion date.
7. **Complete**
   The buyer's conveyancer pays the seller. The buyer receives the documents and the keys.
8. **After completion**
   The Stamp Duty Land Tax return and payment are due within 14 days of completion. In Wales it is Land Transaction Tax. The new owner is then registered at HM Land Registry.

The ladder, as BCL Legal defines it

1. **Paralegal**
   The entry level in the survey. It is where many careers start.
2. **Junior conveyancer**
   Can handle a small caseload of non-complex files.
3. **Advanced conveyancer**
   Can handle a mixed caseload with supervision.
4. **Senior conveyancer**
   Can handle a complex caseload without supervision.
5. **Expert or team leader**
   Strong technical ability across the role, or experience leading and mentoring a team.
6. **Head of department or team manager**
   Can run a busy department or a large team.

FOR LAW FIRMS

Before a CILEX lawyer starts on contentious files

From our article: **What the Mazur ruling means for firms hiring CILEX lawyers**

Read it in full, with the sources for every figure: https://www.wilsonmannion.co.uk/insights/what-the-mazur-ruling-means-for-firms-hiring-cilex-lawyers

Checked 22 October 2026. General information, not legal advice.

IN SHORT

The September 2025 High Court ruling in Mazur was reversed by the Court of Appeal on 31 March 2026. Staff who are not authorised, such as CILEX Fellows without litigation practice rights, can do litigation tasks if an authorised person stays responsible and properly supervises. The sources we read to 22 October 2026 report no further appeal.

Key takeaways

- The Court of Appeal reversed the High Court on 31 March 2026. Unauthorised staff can carry out litigation tasks for an authorised person who keeps responsibility.
- We found no report of a further appeal. We could not check the Supreme Court's own list.
- Supervision must be real, written down and in proportion. The regulators decide the detail, and their guidance is still being refined.
- When you hire a CILEX lawyer, ask which rights they hold, who supervised them and how it was recorded.

Before a CILEX lawyer starts on contentious files

- [ ] Every contentious file has a named authorised person who keeps responsibility.
- [ ] Delegation is written down, as named tasks or a documented scheme.
- [ ] Each supervisor knows when and how they will check the work.
- [ ] Supervisors have time. Their own caseload and the number they supervise have been looked at.
- [ ] File notes, emails or time records show that supervision happens.
- [ ] The tasks in the role match the rights the person holds.
- [ ] Rights of audience are checked separately from litigation rights.
- [ ] You have told your insurer or broker how you supervise, and asked whether they want anything more.
- [ ] You have read the current SRA and CILEx Regulation guidance, and set a date to read it again.

Questions for a CILEX candidate

QUESTION	IF YES	IF NO
Which litigation practice rights do you hold?	Ask which rights, when they were awarded and by whom. Confirm with CILEx Regulation.	Ask whether they have applied and when they expect a decision. Until then, supervise them as you would any unauthorised person.
Who supervised your litigation work, and how was it recorded?	A named authorised person, and file notes or emails that show it.	"Informally" is not an answer. Ask what was written down. The SRA expects supervision to be evidenced.

QUESTION	IF YES	IF NO
What did you do alone, and what did you refer up?	A clear line, with examples of decisions that went to the supervisor.	If the line is vague, ask who decided to issue proceedings.
Do you use the title CILEX Lawyer?	CILEX lists criteria, such as holding litigation rights or declaring you will obtain them by the end of 2026. Ask which applies.	Ask which rights they do hold. The title is not the same as the authorisation.