CONCEPT

Paralegal and Legal Secretary Skills: Matter Files, Court Filing and Litigation Bundles

22 – 26 March 2027
London - Central London four-star



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Introduction:

Paralegal and legal secretary work decides whether a legal team meets its deadlines: a missed limitation date, a misfiled pleading, an unpaginated bundle or a privileged email sent to the wrong party can damage a client's case before a lawyer ever argues it. This Core Concept course trains legal support staff to open and run matter files, control the legal diary, prepare court filings, correspondence and contract execution packs, and protect confidential and privileged material. Participants assemble a Matter File and Paginated Litigation Bundle from a case pack.

Course Objectives:

- Explain the boundaries of the paralegal and legal secretary role, professional conduct duties and the legal terminology used on everyday matters
- Open, organise, profile and close matter files using consistent numbering, naming and retention procedures
- Record and control limitation periods, hearing dates and procedural time limits in a checked legal diary
- Prepare legal correspondence, file notes, court filing packs and basic legal research notes for lawyer review
- Support contract execution and litigation work through version control, execution checklists, contract registers and evidence schedules
- Protect confidential and privileged material and assemble indexed, paginated litigation bundles

Target Audience:

- Legal secretaries who manage lawyers' correspondence, diaries and document production
- Paralegals and legal assistants who prepare filings, research notes and case documents under supervision
- Junior staff in in-house legal teams who maintain matter files and contract registers
- Litigation support staff who compile evidence schedules, disclosure lists and hearing bundles
- Administrative staff moving into legal support roles in law firms or corporate legal functions

Course Outline:

Day 1: The Legal Support Role, Professional Ethics and Legal Terminology

- Paralegal, Legal Secretary and Legal Assistant Role Boundaries Under Lawyer Supervision
- Professional Conduct Duties for Legal Support Staff: Conflict Checks and Unauthorised Practice Limits
- Legal Terminology Glossary: Parties, Pleadings, Judgments, Instruments and Latin Maxims
- Court Hierarchy and Case Lifecycle Map from Claim to Enforcement
- Legal Support Skills Self-Assessment Against a Task Competency Checklist

Day 2: Matter File Opening, Diary Control and Document Management

- Matter Opening Checklist: Client Identification, Conflict Search and Engagement Letter
- Matter Numbering, File Naming Conventions and Folder Structure Templates
- Limitation Periods, Hearing Dates and Procedural Time Limits in a Dual-Entry Legal Diary
- Document Management System Profiling: Metadata, Version Stamps and Check-In Check-Out
- File Closure, Archiving and Retention Schedule Procedure

Day 3: Legal Research, Correspondence and Court Filing Practice

- Legal Research Basics: Primary and Secondary Sources, Citation Checking and Research Notes
- Legal Correspondence Formats: Letters Before Action, Covering Letters and Without Prejudice Marking
- Court Filing Pack Preparation: Forms, Copies, Proof of Service and Filing Receipt Log
- Electronic Filing Portal Workflow and Rejection Reasons Checklist
- Attendance Notes, File Notes and Telephone Message Records

Day 4: Contract Support, Litigation Support, Confidentiality and Privilege

- Contract Version Control: Redline Comparison, Draft Numbering and Clean Execution Copies
- Execution Formalities Checklist: Signing Authority, Witnessing, Initialling and E-Signature Packs
- Contract Register Fields: Parties, Term, Renewal Notice Dates and Original Custodian
- Litigation Support Tasks: Evidence Schedules, Witness Contact Logs and Disclosure Lists
- Legal Advice Privilege and Litigation Privilege: Marking, Misdirected Emails and Waiver Risk

Day 5: Case Study: Matter File Set-Up and Litigation Bundle

- Bundle Index Construction: Tabs, Sections, Chronological Ordering and Pagination
- Core Bundle Versus Full Hearing Bundle Selection and Duplicate Removal
- Case Pack Exercise: Opening the Matter File and Populating the Legal Diary
- Case Pack Exercise: Assembling the Paginated Litigation Bundle and Index
- Supervising Lawyer File Review with a Client Progress Letter Draft

Skills You Will Gain:

- Matter File Management
- Legal Diary Control
- Court Filing Preparation
- Litigation Bundle Assembly
- Contract Execution Support
- Privilege Protection
- Legal Terminology Use
- Legal Correspondence Drafting

Why Attend This Course:

- Leave with a Matter File and Paginated Litigation Bundle built from a realistic case pack
- Cut missed deadlines and rejected filings with checklists and diary routines ready for daily use
- Work with lawyers and clients more confidently, knowing where the support role ends and escalation begins
- Compare file, bundle and contract register practice with support staff from law firms and in-house teams across sectors

Conclusion:

Reliable legal support rests on disciplined files, a diary nobody doubts and documents a lawyer can put before a court without rework. The week moves from the support role, conduct duties and legal terminology, through matter opening, diary control and document management, to research, correspondence and court filing, then contract execution, litigation support and privilege. The final day applies every routine to a case pack, and each participant leaves with a Matter File and Paginated Litigation Bundle that serves as a model for live matters.