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The purpose of these guidelines is to provide a consistent framework for working with other World Tech Legal (WTL) firms. They are designed to assist members to work together smoothly and collaboratively and to provide all WTL firms with guidance on working with other WTL firms. These WTL firm guidelines provide information to help foster a collaborative and effective network of legal professionals within the World Tech Legal organisation.

This document contains the following:

The WTL firm guidelines

Template introductory email to introduce clients to WTL firms.

WTL firm Rate Card

Pro forma feedback email

1. WORLD TECH LEGAL FIRM MEMBER-TO-MEMBER GUIDELINES

The following WORLD TECH LEGAL FIRM INSTRUCTION TEMPLATE below is intended to assist in preparing an introductory email to member’s clients and other member firms.

**Introductory calls before instruction** – The expectation is that introductory calls, meeting or correspondence will not be chargeable unless explicitly agreed. Prior to a scope of work and fee arrangement being agreed, the assumption is that initial introductory and scoping conversations with clients would not incur costs.

**Clearly define the scope of work** – To help ensure that there are no misunderstandings regarding the scope of the engagement, clearly outline the specific advice and deliverables expected from the member firm.

**Provide relevant documentation** – Provide the other member firm with all necessary documents, including contracts, financial statements, and any other relevant materials, to enable them to effectively provide their advice.

**Fee transparency; agree fee and billing arrangements** - Before commencing work, clearly outline the fee arrangement, including hourly rates, expenses, any other applicable charges and the timeframe for payment. Fees and disbursements should be agreed prior to being instructed (see the rate card attached). This should help avoid any issues regarding fees or payment and ensure that both parties are transparent on the financial arrangement.

**Maintain open communication** - Communicate regularly with the other member firm throughout the course of the engagement. Confirm the preferred method of communication (e.g. direct or indirect communication, email, copy to original WTL member firm). This should allow for timely updates, address any potential issues, and ensure that the work is progressing as expected.

**Establish clear timelines** - Set realistic deadlines for each phase of the work and inform all parties are aware of these timelines. Regular check-ins can help keep the project on track and avoid delays.

**Utilise technology** - Leverage technology to facilitate communication and collaboration between member firms across where feasible. This includes the WTL Slack Channel (as found here: <https://www.worltechlegal.slack.com>) video conferencing, instant messaging and document sharing platforms.

**Develop a feedback mechanism** - Establish a system for gathering feedback from both member firms after the completion of an engagement. Please see the style of the pro forma feedback email for further guidance. This feedback can be used to identify areas for improvement and enhance future collaborations.

**Maintain confidentiality** – Local regulations and professional standards will likely prescribe confidentiality obligations but both the instructing and other member firms should be mindful of protecting sensitive client information received from one another or the client directly and stating one’s obligations. This may involve implementing specific data security measures and confidentiality agreements.

**WORLD TECH LEGAL CLIENT INTRODUCTION TEMPLATE E-MAIL**

Dear [*WTL Lawyer Name*]

We are pleased to introduce you to [*Client Name*]which is seeking assistance with [*Project XX or specify the particular instruction*]. [*Member Firm Name*] is a law firm practising in [*Jurisdiction*] which focusses on [*Area of Practice*]. It is a member of the World Tech Legal network, a global alliance of independent law firms. This network allows us to provide our clients with seamless legal representation across multiple jurisdictions.

It is proposed that [*Member Firm Name*] will provide the following services to [*Client Name*]:

* [*List the specific work requests*]

The work will be carried out in accordance with the following timescales:

* [*Timeline for the work request(s)*]

We would be grateful if you could provide an initial indication of your fees or an approximate fee range for the above services.

We would be happy to schedule a call with [*Client Name*] to discuss your needs in more detail. Please let us know if you are interested in scheduling a call.

In the meantime, please feel free to visit the [*Member Firm Name*] website at [*Website Address*] to learn more about the firm.

Thank you for your time and consideration.

Kind regards

**WORLD TECH LEGAL MEMBER LAW FIRM RATE CARD TEMPLATE**

1. Proposed Rate Card for Member Firms to share with one another and/or their clients

| **Seniority** | **Details of hourly rate** | **Comments** |
| --- | --- | --- |
| Partner | *[CURRENCY RATE PER HOUR]* | [The Partner will be responsible to supervise the work…] |
| Specialist | *[CURRENCY RATE PER HOUR]* | [The Specialist will provide specific sector expertise and advise on [*specific legal matter*]] |
| Senior Associate | *[CURRENCY RATE PER HOUR]* | [The Senior Associate will supervise junior team members and manage the transaction] |
| Associate | *[CURRENCY RATE PER HOUR]* | [The Associate will be responsible for supervise more junior team members and carrying the work] |
| Trainee | *[CURRENCY RATE PER HOUR]* | [The Trainee will be carry out the work] |

| Type of Feeing Arrangement | Sum \* | Comments |
| --- | --- | --- |
| 1. Fixed Fee Quote | 1. *[CURRENCY AMOUNT]* | 1. This quote assumes the scope work does not change in any way (either in relation to relevant transaction(s) which relate to the work, the complexity, the timescales or a given number of revisions or renegotiations that are set out or envisaged). If the scope of the work changes then we reserve the right to review this with you. |
| 1. Agreed Fee Range | 1. *[CURRENCY AMOUNT]* | 1. [The lower end of this fee range will apply if there are no more than [TBC] iterations of documentation or rounds of negotiation and the transaction does not become complex or protracted. The higher end of the fee range will apply if the transaction involves more iterations, negotiations or complexity. If the scope of the work changes then we reserve the right to review this with you.] |
| 1. Monthly Retainer | 1. *[CURRENCY AMOUNT]* | 1. [*insert any assumptions/qualifications for the proposed work*] |
| 1. Fixed fee Quote | 1. *[CURRENCY AMOUNT]* | 1. [*insert any assumptions/qualifications for the proposed work*] |
| 1. Blended Rate | 1. *[CURRENCY AMOUNT]* | 1. [*insert any assumptions/qualifications for the proposed work*] |
| 1. *\*[local taxes] and disbursements will separately apply* | | |

1. Additional Work

[Please note that any additional ongoing work by us that is not agreed in advance will be charged on the hourly rates of the relevant member of personnel. We will aim to agree any additional work and costs ahead of time.]

1. Disbursements

[Any costs incurred for disbursements such as a [register searches] are charged in addition to our fees.]

1. Payment

[Our fees as payable on a monthly basis / at the end of the transaction.]

**WORLD TECH LEGAL PRO FORMA FEEDBACK EMAIL**

Dear [*Member Firm Name*]

I am writing to provide feedback on your firm's recent services for [*Client Name*] *in connection with [Project*].

Overall, we were [very pleased] with the services provided by [*Member Firm Name*].

[*Member Firm Name*] was [responsive, professional, and knowledgeable throughout the entire engagement. The team was always willing to go the extra mile to ensure that our needs were met.]\*

We were particularly impressed with the following aspects of [Member Firm Name]'s services:

* Communication: [*Member Firm Name*] kept us informed of the progress of the engagement on a regular basis. They were also always available to answer our questions.
* Expertise: [*Member Firm Name*]'s team of lawyers has a deep understanding of the law. They were able to provide us with sound legal advice that helped us to achieve our goals.
* Efficiency: [*Member Firm Name*] completed the engagement in a timely and efficient manner.]\*

In addition, we would like to share the following testimonial from [*Client Name*]:

"[Client’s testimony]."

We are confident that [Member Firm Name] will continue to provide our clients with the highest quality legal services.

Kind regards

[***Your Name***]

**\*These are used for examples, please amend accordingly, any constructive criticism should also be included if applicable. Please see the following example of an email in the circumstances that feedback is constructive:**

Dear [*Member Firm Name*]

I am writing to provide feedback on your firm's recent services for [*Client Name*]/in connection with [*Project*].

While we value our relationship with [*Member Firm Name*], we were unfortunately [*disappointed/concerned*] with certain aspects of your recent engagement.

Areas for improvement:

* Communication: [Communication was inconsistent/unclear, especially regarding [specific examples]. We often had difficulty reaching team members and felt uninformed about project progress.]
* Expertise: [The team didn't seem to fully grasp the complexities of our case/project, leading to [specific shortcomings or errors]. Their legal advice left us feeling unsure/unconfident.]
* Efficiency: [The engagement exceeded the expected timeframe/budget due to [specific inefficiencies]. This caused disruptions and impacted our internal timelines.]

Client Feedback:

"[Client's statement reflecting their dissatisfaction in an area, e.g., 'While I appreciate the effort, the final outcome wasn't what we anticipated.']")."

We look forward to discussing these concerns further and working together to ensure future engagements meet our expectations.

Kind regards

[***Your Name***]