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## *Participant's Guide for Professionalism Case Studies*

### **Your Assignment**

If you were in the lawyer's position [paralegal's position], how would you analyze the situation described? What action would you take and why?

### **Preparation**

**Step 1** Read the case and make notes to summarize ideas, raise questions, list the relevant concepts and record your observations.

**Step 2** Define the issues by answering the following questions:

*Who* is the decision maker in the case that I am supposed to identify with, and what position, title, and responsibilities do I hold?

*What* appears to be my issue, concern, problem, challenge or opportunity and its significance for the organization?

*When* do I have to decide, resolve, act or dispose of this issue? Is this an urgent matter?

**Step 3** Analyze the case data, including the information provided in any exhibits included with the case. Try to determine the root causes of the problems presented. Identify any constraints or opportunities in the situation which could have an impact on your decision.

**Step 4** Generate realistic alternatives for removing the causes of the problems. Be creative and refer to your own knowledge or past experience. Remember that maintaining the status quo (taking no action) may be an acceptable alternative in the situation.

**Step 5** Define the criteria or standards by which you will evaluate the alternatives, e.g. the relevant *Rules of Professional Conduct* [*Paralegal Rules of Conduct*], the client's needs, financial considerations, etc.

**Step 6** Assess the alternatives available to you, listing the key advantages and disadvantages of each alternative. Identify the short and long-term considerations and try to predict the best possible, most likely and worst possible outcomes of each alternative.

**Step 7** Select the preferred alternative or combination of alternatives.

**Step 8** Develop an action and implementation plan, answering the questions: who, what, when, where and how?