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The client-matter capstone

Bring your source work, analysis, documents and decisions together in a connected fictional matter.

Careful reading. Applied work.

Accountable professional judgment.

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A note on this edition

These materials support an editorial learning pilot. Exercises use fictional matters and are not legal advice. No accredited award or practising qualification is offered. Read the stated scope and assessment conditions before you begin.

A21 | Lantern capstone: scope, evidence and priorities

Learning focus

Prerequisite: A07–A20. Integrate intake, source review and dependency analysis on Lantern. The short examples in this capstone sequence demonstrate method; they are not a completed Lantern submission.

First pass: review your A07 intake and A12 issue record without opening a model answer. Select the five decisions that still matter. Move on when each has a traceable source, dependency and useful next action; carry forward corrected work rather than recreating every earlier artifact.

Study notes

Begin a fresh review of your existing Lantern matter file, not a new copy of every earlier assignment. Return to the base case; technical-specimen replacement figures do not become Lantern's permanent facts. The casebook contains incompatible versions and incomplete assurances; recheck your earlier position against the evidence and any authorised event. Preserve the original inputs and update the evidence index, entity, objective, commitment and authority. This familiar, disclosed matter is practice, not proof of performance on an unseen case.

Classify each issue as confirmed conflict, missing evidence, legal question or commercial decision. These classifications imply different actions. An entity mismatch may require clarification; a price difference needs reconciliation and instructions; a statutory issue may need specialist review. Avoid marking every uncertainty high risk without explaining its consequence.

Use a dependency map. An acceptance process depends on agreed deliverables; the start of subscription billing may depend on acceptance; exit rights depend on a durable rights/data package. Resolving one clause in isolation can move rather than remove the problem. Record provisional assumptions so a later changed fact can be traced through the work.

The capstone is individually assessed. You may discuss general methods with peers, but must prepare your own analysis and disclose permitted assistance. Do not request the marking key or an unseen event. This stage does not authorise a real client engagement.

Worked example

In a separate fictional matter, Order J1 lists five reports for a fixed fee, Scope J2 lists three and an email proposes charging for the other two. Nothing is signed.

Entry	Classification	Completed consequence/action
J1/J2 report count	Confirmed document conflict	Agree a named baseline; do not silently expand or cut deliverables
Extra-report price	Commercial decision plus incomplete evidence	Obtain a priced proposal and sponsor instructions
Billing starts on acceptance	Dependency	Define tests before treating billing start as settled

Completed priority note: "Resolve report scope and price together before approval. Ask whether the two extra reports are already included or genuinely additional. Draft coherent alternatives; do not present a unilateral correction as agreement." Each row says what evidence proves and what decision remains.

Guided practice

The supplier confirms all five reports are included, but gives no delivery date for two. Which entry closes and what remains?

Feedback

Record the clarification with its authority/version. The price/scope issue may narrow, but delivery timing and acceptance remain unresolved. Trace effects on launch and billing; do not mark the entire package approved from one answer.

Practice assignment

Submit an intake note, evidence index, ten prioritised questions and a risk/decision table. For each of your five most material issues, identify source ID, consequence, owner and next action. Maximum 1,000 words excluding tables. This is a capstone checkpoint; the final P1 pack incorporates your revised work.

Participation

Hold a method clinic without sharing draft answers. Each learner explains how they distinguish a missing document from an adverse fact. Give one peer a question about method and record your own response.

Source study

Select the most relevant source readings from A07–A12 and explain their applicability limits. Do not expand the scope to unrelated jurisdictions merely to add citations.

Readings for this unit

Companies Act 2006, section 43 — UK company law: check extent. Read: Section 43. Check: Identify the actor/authority question in your intake.

Wood v Capita [2017] UKSC 24 — England and Wales. Read: Paragraphs 10–13. Check: Identify a material whole-document conflict.

A22 | Lantern capstone: coherent documents and economic choices

Learning focus

Prerequisite: A21. Produce consistent clean and marked-up extracts, a matching economic model and a decision note. Use source-backed legal analysis only where the issue actually requires it.

First pass: choose one A21 priority and trace it through the clean clause and worksheet before checking the whole set. Move on when your three scenario results match the actual proposed wording and the decision memo distinguishes your preferred package from an approved bargain.

Study notes

Draft a coherent package across the order, scope and main agreement. Preserve commercial intent and make changes visible. Every proposed alteration should solve an identified problem, not simply replace the supplier's style with your preferred wording. Read the clean set and test it against ordinary and failure scenarios.

Prioritise the points that determine the bargain: entity, scope, term, price, acceptance, rights, data, remedies and exit. Include the effect of precedence and online-policy changes. A strengthened schedule may have little value if another clause permits it to be overridden unilaterally.

Your financial model should reconcile to the draft. If subscription starts on acceptance, show that assumption. If an extra report is included, do not also charge its optional development fee without explanation. Keep legal enforceability and negotiated preference distinct in comments.

Prepare a decision memorandum that a sponsor can use. Show the preferred package, a viable alternative and matters requiring further instructions. A proposal is not accepted merely because it fits within your own model.

Worked example

Separate teaching proposal: order J3 specifies £1,000 monthly for twelve months after acceptance plus £2,000 implementation. The MSA instead says £1,500 monthly from signature and has general precedence.

Completed proposed precedence extract: "For the services identified in Order J3, that order controls the conflicting monthly fee, initial term and billing-start provisions. The agreed acceptance schedule controls completion testing. Other MSA provisions remain subject to review." This targets the actual conflicts rather than displacing every protection in the MSA.

Completed economic note: "Twelve subscription months $\times$ £1,000 + £2,000 = £14,000 before tax or separately approved changes. This is an acceptance-triggered twelve-month commitment, not necessarily cash payable in the first twelve months after signature. Do not retain a signature-triggered fee elsewhere."

Consistency test: compare parties, document versions, start trigger, scope, amount and approval status across the clean order, clause and worksheet. Proposed wording remains unapproved until the designated decisions are obtained.

Guided practice

Acceptance moves two months later. Is the £14,000 commitment automatically reduced?

Feedback

No on these stated terms: the twelve-month subscription period starts later. Cash timing changes; a different first-year reporting window may change reported spend. A price reduction or shorter paid term needs an agreed change, not an accidental spreadsheet assumption.

Practice assignment

Revise your existing clean/marked-up extracts and fee/credit worksheet; do not produce a second document set solely for this checkpoint. Develop the decision memo within two pages, ready to incorporate into P1. Include three scenario tests: delayed customer input, an early service failure and exit after material supplier breach. State what your wording would do and which issues remain for counsel.

Participation

A peer checks only consistency and usability, not substantive answers for you. Record every comment you accept or reject. Submit your own revised package and review log.

Source study

Revisit WOOD, UCTA2/3/11 and IP11/IP90 as relevant. Explain why your drafting response requires both a source-based legal analysis and a commercial instruction.

Readings for this unit

Wood v Capita [2017] UKSC 24 — England and Wales. Read: Paragraphs 10–13. Check: Trace your proposal through the clean document set.

Unfair Contract Terms Act 1977, section 2 — England and Wales: check statutory extent and application. Read: Section 2. Check: Identify any negligence-related restriction needing analysis.

Unfair Contract Terms Act 1977, section 3 — England and Wales: check statutory application. Read: Section 3. Check: Check the actual standard-terms trigger.

Unfair Contract Terms Act 1977, section 11 — England and Wales: check statutory application. Read: Section 11. Check: State the relevant facts and limits of the reasonableness analysis.

Copyright, Designs and Patents Act 1988, section 90 — UK copyright. Read: Section 90(3). Check: Identify any assignment-evidence gap, separately from licensed use.

A23 | Lantern capstone: changed facts and operating controls

Learning focus

Prerequisite: A22 and A18–A20. Trace a new fact through the contract, operating plan and approval record. If studying alone, use the public variation below and label it practice.

First pass: identify what the event changes in one A22 decision before updating every dependent artifact. Move on when the changed terms, operating register and authority log agree, a failed exit test remains visible, and your recommendation offers a practical next step rather than merely a warning.

Study notes

Respond to the facilitator's staged event by tracing dependencies. Do not overwrite your previous position without a record. Identify the new fact, its reliability, the affected provisions, the available options and the necessary authority. If no facilitator is appointed, use this public practice variation: the replacement provider's test import fails because the export omits report definitions, although user records are present. There is no approved extension of service or exit budget. This variation is disclosed and is not an unseen assessment.

Turn the proposed contract into operations: intake, approval, version binding, signed-record capture, obligation ownership, reminders and exit. A legal work product should enable the people who must perform it. Test a rejected approval, a changed file, missing data and an unavailable reviewer. Prefer an honest manual control over an untested automation.

AI can assist comparison and organisation within approved boundaries, but cannot approve the new position or convert a document instruction into system authority. Preserve relevant outputs and explain corrections or rejected suggestions if you used a tool; a manual record is equally acceptable. Do not use unrelated confidential data to make a demonstration more realistic.

Worked example

Separate teaching event: an export delivered on time cannot be imported by the replacement service. The contract specifies CSV user records but says nothing about report definitions.

Completed impact record: "Evidence E-7: failed test and schema comparison. User records delivered; functional transition not demonstrated. Check promised export scope before alleging breach. Request required definitions, rights and usable format; Operations to retest. Any service extension or additional fee needs sponsor/finance instruction. Do not close the old access path without an approved continuity plan."

Completed control test: "Expected: exit complete only after a successful authorised import and rights/ access review. Observed: failed import, status remains blocked. Next action: revised export and retest, not a fabricated successful result." The test connects a contractual ambiguity to a real operating consequence.

Guided practice

The supplier offers to supply the missing material only under a new licence excluding replacement-provider use. What changes?

Feedback

Add a rights dependency and seek a usable licence/alternative. Possession of a file does not establish permission for the intended use. Reconcile IP, exit and timetable; do not solve the technical test by ignoring the licence restriction.

Practice assignment

Update the same matter file: add a changed-fact impact note and revise your concession/authority log, tested workflow and six-row obligation register. Submit the changed versions with an index identifying what changed and what remains current, not fresh copies of unaffected analysis. Include one stopped/ blocked action and the evidence needed to proceed. Record your AI/manual process and actual time spent without inventing productivity savings.

Participation

Conduct an operational handover. Another learner must identify the next action and owner from your pack without asking what you intended. Submit corrections individually.

Source study

Use ICO28 and NIST to distinguish legal data questions from technical control questions. Use your actual contract text to determine obligations; frameworks do not create the agreed bargain.

Readings for this unit

ICO: what needs to be included in the contract? — UK data protection. Read: Instructions and end-of-contract provisions; current review notice. Check: Relate the changed activity to exit/data questions without assuming clearance.

NIST AI Risk Management Framework: Generative AI Profile — Technical risk-management reference, not law. Read: Section 2.9 and Section 3 action GV-3.2-003. Check: Reuse A18's distinction to specify a test that stops an unapproved action after the event.

A24 | Lantern capstone: submission, defence and portfolio

Learning focus

Prerequisite: A21–A23. Check readiness, demonstrate ownership of your reasoning and describe simulated work accurately. Submit the final pack once at P1, with O1 separately observed when available.

First pass: follow one material decision from source to clean text, number and next action without consulting the worked example. Move on to independent assessment only when you can explain a changed fact and correct an error yourself. Use the Northfield attempt as additional transfer evidence, not as an unseen test or an automatic proficiency award.

Study notes

The final pack should stand on its own. Include scope, final proposed documents, evidence, assumptions, options, decisions, permissions and unresolved issues. A reviewer should be able to reconstruct why a material choice was made and who must approve it.

In the oral defence, explain your reasoning without live AI assistance. You may be asked to revise an answer when a fact changes, find an inconsistency or identify a limit of your competence. It is acceptable to pause and state what needs checking. It is not acceptable to invent an authority or pretend a missing approval exists.

Separate your professional portfolio from the controlled assessment record. Share only original fictional work you are entitled to share, remove assessor-only material and describe the task accurately. A self-study completion, peer review and moderated academy assessment are different claims. The platform does not issue this professional award automatically.

Worked example

Completed defence extract for a separate teaching cap: "I proposed a £60,000 aggregate including ordinary IP claims, not £60,000 per claim. Two qualifying £40,000 claims would exhaust it at £60,000 on my simplifying assumptions. I have not certified enforceability or insurance response. The sponsor must approve the residual exposure after counsel's review."

Completed readiness row: "Decision D-4 → proposed liability wording v3 → scenario sheet rows 4–6 → source/applicability note → sponsor approval outstanding. Do not label this agreed."

Accurate portfolio caption: "Fictional English-law contract-review exercise; individual self-study with disclosed peer clarity feedback; proposed documents, not client advice or a moderated award." Strong presentation makes limitations inspectable; it does not hide them behind a broad claim of professional qualification.

Guided practice

Your final clean clause says "per claim," but your model and explanation say "aggregate." What should happen before submission?

Feedback

Stop the consistency check, identify the intended proposal and correct every dependent output with a version log. Explain the financial consequence. Do not defend the model while ignoring the document students or a supervisor would actually read.

Practice assignment

Prepare a readiness sheet mapping each P1 requirement to its file/section, unresolved approval and evidence. Rehearse three defence questions from your own decisions and record one correction within 450 words. Submit the final integrated pack once in the separate P1 assignment, subject to its 2,500-word narrative limit. O1 is a separate 30-minute observed defence; a solo rehearsal does not establish it. Include authorship, collaboration and tool declarations without copying the whole final pack into this checkpoint.

Participation

Give a five-minute fictional-work presentation focused on one improvement from your initial draft. Peers ask about method and lessons learned; they do not vote on the credential. Submit a 250-word reflection and an individual next-learning plan.

Source study

Revisit SRA's competence-boundary and record-management expectations. Identify which demonstrated skills transfer to a workplace and which still require jurisdiction-specific knowledge, experience or professional qualification.

Readings for this unit

SRA: statement of solicitor competence — England and Wales. Read: A3 and D2. Check: Optional benchmark: distinguish demonstrated simulated work from practising entitlement.