Thoughts on
Creating Professional
Work Product

1. **Remember the three P's of document preparation: Plan, Process and Polish**. Count on allocating one third of your time to complete the project to each step.

    a. **Plan**: You should begin with an explanation of what you are going to accomplish. You should conclude with a statement of what you have said. If you can't state at the beginning of a document what you are trying to accomplish, STOP. You are not ready to start writing.

        i. In many instances, an outline is a helpful guide to writing a document. It is like a set of plans in building a house.

        ii. Consider format at the outset. In what context is this document being prepared? How can formatting improve the understandability of the document?

    b. **Process**: Once you know what you are trying to accomplish and how something is supposed to look, you can start work.

    c. **Polish**: Rarely is the document as you first complete it ready to go out the door. The document needs to be polished from rough form into final form. See the comments below.

    d. *Note: You Should Reasonably Expect to Spend 1/3 of Your Effort in Each of the Three Areas Above!*

2. **Writing Tips**

    a. Begin with an explanation of what the written product accomplishes.

    b. When possible, limit sentences to 25 words or less.

    c. Avoid repeating the same factual phrase and use a defined term instead. In this way, the "2003 Chevy Suburban owned by the Defendant" becomes the "Defendant's Truck". Here is an example.

> **The Defendant was driving a 2003 Chevy Suburban owned by the Defendant, VIN Number 12345678900WX (the "Defendant's Truck") at the time of the accident. The Defendant's Truck caused significant damage to the Plaintiff and her vehicle.**

    Once you have inserted a defined term, make sure to use it consistently throughout the document.

    d. Pay attention to consistency in Voice and maintain consistency of person. (I, We, the Firm, our client, etc.)

3. **Avoid the Tyranny of the Form**. Forms documents are very good aids in starting a project but they have their limitations.

    a. You can be sure that the form document will require unique thought to adapt it to use in the new matter. Do not fit the matter to the form; convert the form to the facts and law of the current matter.

    b. Any time you pull up a document that has been prepared for another client, assume that there is a 100% chance that the previous client's name is in the document. Search for it until you find it. And, then, search again.

4. **Presentation Tips.** Presentation matters because it will either enhance or reduce the readability of your document. Format your document or spreadsheet in such a way as to enhance understanding.

    a. Maintain consistency in paragraph formatting.

    b. Look at paragraph and page breaks: do not orphan paragraphs or pages.

    c. Use a readable font: compare **Arial** to Times New Roman.

    d. Use topic headers to guide and orient the reader.

e. Use outlining within the document to provide structure.

f. Use page numbers on documents longer than two pages.

5. **Accuracy Tips**

a. Check paragraph cross-references to make sure that they refer to the correct paragraph number. Paragraph numbers change quickly.

b. **Attachments** are documents we create that are attached to our written work. **Exhibits** are documents created by others that we attach to our written work. Number each set sequentially. If the text refers to an Attachment or Exhibit, check to make sure that it is there.

c. If there is a number in a document, check it against the source. Check the accuracy of the math: use a calculator..

6. **Reviewing Your Work Product**

a. Print the document and proofread a hard copy. Documents look different on the computer than they do when printed. We send clients printed documents. Remember that clients many times cannot judge the substance of our work except by how it looks. **We do not proofread computer screens…we proofread printed documents.**

b. Create a special place and procedure for reviewing your written work. Remove yourself from your normal workspace to a conference room or other place where you can work without distraction or interruption.

c. Use common sense. Be analytical. Look at things from a different perspective: imagine you are the party on the other side of the issue (IRS, opposing party, etc.) and review it from their perspective.

7. **Finish the Project**. Realize that it is your responsibility to ***finish*** the written work. Put another way, just because you believe you are done, doesn't mean the work is finished. When you submit a document for review, you are saying that, to the best of your ability, the document is ready to go to the Court, the client, the opposing attorney or the third party.

    Be aggressive in seeking feedback and the opportunity to advance the project after comments: you will not learn much from the process of reviewing your own work. Assessing the comments of others and incorporating those thoughts and critiques into your work will advanced your knowledge and skills at a dramatic pace.