Random Thoughts on
Creating Professional
Work Product

1. 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.

2. Remember the three P's of document preparation: Plan, Process and Polish. Count on allocating 1/3 of your time 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. Many times 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!

3. Print the document and review 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.**

4. Create a different 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.

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

6. 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
   c. Use a readable font: I prefer Arial to Times New Roman.
   d. Use Topic Headers
   e. Use outlining within the document to provide structure
   f. Use page numbers on documents longer than a page.

7. Avoid repeating the same factual phrase. Use a defined term instead.

   a. Example: "Plaintiff's personal residence located at 760 Egret Pointe, Vero Beach, Florida" could be become "Plaintiff's Residence"
   b. Define the term the first time it is used.
   c. Make sure that the Defined Term is used consistently.

8. Pay attention to consistency in Voice. Maintain consistency of person. (I, We, the Firm, our client, etc.)

9. Check paragraph cross-references when the document is complete. Even small edits can throw off numbering sequences.

10. ***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 them sequentially. If the text refers to an Attachment or Exhibit, check to make sure that it is there.

11. If there is a number in a document, check it against the source. Check the math: use a calculator to check.

12. When formatting dollar figures:

   a. Columns of numbers begin with a dollar sign, and end with a total with a dollar sign, above which is a single line and below which is a double line.

   b. Use separate columns to create sub-totals.

13. Review the footers and headers of your documents.

14. Review the notarial block. Does it refer to the correct parties? Does it reflect the place where the document is likely to be executed?

15. 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.

16. Does the document explain the substance of the action requested by the recipient and the impact we believe it to have on them?

17. Is it clear from the document who our client is, and isn't?

18. Page Breaks: Don't orphan a paragraph or a header.