Tips on Using This Document

This document is designed to provide lawyers with some suggestions on ways to organize their thinking about the activities associated with particular types of engagements. They are a starting point designed to help quickly and consistently prepare to discuss with clients the likely path of an engagement and estimate the costs of doing so. Any particular matter may require the expansion, contraction or rejection of these suggestions.

Ultimately, the purpose of any task code set and any budgeting effort is to align the expectations of clients and their lawyers about how an engagement will proceed. This document provides a sample task code set to facilitate the construction of matter specific work plans. To do so, consider these steps:

- Use these templates as a guide for your consideration and discussions with your client about the scope of the engagement.
- Use these templates as a starting point for your development of a work plan for the engagement.
- Pick and choose the phases and tasks relevant to the particular engagement.
- Add tasks or sub-tasks as necessary to articulate the important deliverables or work items for the
- Estimate the time needed to complete the tasks and make judgments about the size of the team needed.
- Be sure any additions or deletions you make do not change the formulas that the document will calculate for you.
- Discuss a fee arrangement with the client in conjunction with agreement on what tasks are in-scope or out-of-scope.