

# Representative Matters Lists and Deal Sheets

**Summary:** You need to have a list of cases you have worked on or deals you have helped close to show law firms what you have done. Learn more in this article.

A Representative Matters List (for litigators) and a Deal Sheet (for transactional lawyers) is a document that lists the major cases or deals that a lawyer has worked on. If you are a lawyer with at least a few years of experience you should have a Representative Matters List or Deal Sheet. You can use this document in connection with your job searches by submitting it along with your resume. You can also use it as a marketing tool to help with rainmaking and client development.

The bottom line is that whether you are a litigator or a transactional attorney you should have an up-to-date list of cases you have worked on and deals you have closed. A well-crafted Representative Matters List or Deal Sheet will set you apart from the pack - conveying your professional accomplishments in a way that a resume alone cannot and demonstrating the thoroughness, attention to detail and "pride of ownership" employers seek in new hires and clients in attorneys.

The goal of your Representative Matters List or Deal Sheet is to give the reader a deeper understanding of your career experience than is provided by your resume alone. Your Representative Matters List or Deal Sheet should highlight your accomplishments with concrete examples in a clear, concise and crisp manner.

Here are some examples:

## Representative Matters List

- Successfully defended leading international consumer products manufacturer in class action alleging products liability and misrepresentation causes of action.
- Secured multi-million dollar verdict on behalf of oil and gas company executive in sexual harassment and gender discrimination lawsuit.
- Secured acquittal for former partner of major accounting firm accused of securities and insider trading violations.
- Won summary judgment on behalf of defendant motion picture studio in high-profile copyright infringement action involving rights to reality television show.
- Successfully argued precedent-setting case in [state appellate court] on an issue of first impression involving vicarious liability of municipalities for certain torts of their employees. [case cite]

## Deal Sheet

- Represented global financial institution as agent and arranger for \$300,000,000 syndicated loan to leading international e-commerce company.
- Represented sponsor of \$1.5 billion water and power plant project in East Africa.
- Represented nationwide hospitality company in its \$650 million senior subordinated notes offering.
- Represented Fortune 500 company in its \$400 million acquisition of leading natural pet food manufacturer, making client one of top revenue-makers in the pet products industry.
- Represented private equity fund in its significant minority investment in new media company based in

the U.K.

## Organizational Structure

There is no set formula for organizing your Representative Matters List or Deal Sheet. The key is to come up with a structure that meets the objective of highlighting your accomplishments. Generally speaking, anything high profile or high value (in terms of dollar amount or legal issues involved) should go near the top. After all, you are trying to impress your reader, and being involved in high stakes matters is impressive.

You can also group information by kinds of cases or deals. For example, if you are a litigator with a number of wins in both copyright cases and general commercial litigation, you can cluster your cases under those topical areas. Similarly, a transactional lawyer might list his or her major deals under the headings Secured Lending (listing traditional credit agreements) and Structured Finance (listing asset securitization transactions).

You can also group matters or deals by the different firms where you worked or even chronologically.

Whatever organizational structure you choose, it should have an internal coherency and include all your most impressive work. Someone should be able to glance at the list and within a few seconds understand that you have a proven track record of success in specific areas of law.

## Length and Format

There is no set page limit for a Representative Matters List or Deal Sheet. However, you want everything to look as professional as possible. If your list is one page with a few extra lines spilling over to a second page, try to tighten things up so everything fits on one clean page.

If you are planning to circulate your Representative Matters List or Deal Sheet along with your resume, you should use consistent formatting and fonts in both documents.

## Mid-Level Attorneys

Representative Matters Lists and Deal Sheets are not just for partners. If you have enough years of experience to have amassed significant accomplishments in law then you should have a Representative Matters List or Deal Sheet. You just want to ensure that you accurately portray your role in the matters and deals you describe. The examples set forth above imply that the lawyer was the "lead attorney" in a given situation - whether that means the first chair in a trial or the partner-in-charge of a big deal. Less senior attorneys can modify their entries as follows:

- Assisted in successful defense of international consumer products manufacturer in class action alleging products liability and misrepresentation causes of action; responsibilities included participating in all phases of discovery, defending key depositions, and preparing pretrial documents.
- Second-chaired federal court jury trial on behalf of plaintiff in sexual harassment and gender discrimination lawsuit in which plaintiff won a multi-million dollar verdict.
- Assisted in representing global financial institution as arranger and administrative agent for \$300,000,000 syndicated loan to leading international e-commerce company; responsible for drafting, reviewing and revising revolving credit agreement as well as security documents.
- Assisted senior partner in connection with representation of sponsor of \$1.5 billion water and power plant project in East Africa, including taking the lead on securing local counsel and traveling to Africa in connection with due diligence.

## Confidentiality Issues

When it comes to client matters, you must always be mindful of confidentiality issues. But being an ethical and responsible attorney does not mean that you necessarily need to keep everything secret for all time. If a case or deal you worked on has become public or has been documented in any type of media (including your firm's website), you should be able to use the information, including the names of the parties. If a court case you worked on is a reported case then you can use the party names and you should also include the citation.

However, if you are unsure, simply err on the side of caution by using the more generic language in the examples above. You can still describe substantive work product without naming specific people or entities.

## Real World Examples

Given the prominence of law firm websites in today's Internet-driven world, many accomplished lawyers have Representative Matters Lists and Deal Sheets right on their web pages. Here are some examples from a [litigation partner at Cravath, Swaine & Moore](#); a [litigation partner at Shearman & Sterling](#); a [partner in the Capital Markets Department of Weil Gotshal & Manges](#); and a [partner in the Banking & Asset Finance Department of K&L Gates](#).

## Conclusions

If you have been a practicing lawyer for even a few years, it is time to put your Representative Matters List or Deal Sheet together. This should be a fun project - allowing you to "take stock" of your accomplishments and career.

If you are a litigator, think back on the major lawsuits and trials you have worked on. If you are a transactional lawyer, take a look at the closing binders in your bookcase and tombstones on your credenza. You did all that! You helped produce something real for a client, whether it was a courtroom victory or a financial transaction. With that inspiration in mind, simply put pen to paper and describe these accomplishments so you can show future employers and clients what you have done for others and what you can do for them.