

Research Plan

Date: _____

WHAT:	
Is my assignment?	
Are the legal issues/descriptive words?	
Are the facts/descriptive words?	
Do I need an issue statement for searching?	
Are the sources recommended (books/online/work product/ human)?	
Are the obvious missing important facts or information I need to ask for?	
Should my work product look like?	

WHY:	
Am I doing this?	
What are the objectives?	

WHO:	
Are the parties?	
And which side of the lawsuit or the transaction are they on?	
Are there legal entities involved? If so, what kind? Names?	
Is my audience?	
Else has worked on a similar case?	

WHERE:	
Is the applicable law/jurisdiction?	
State? Federal? One circuit? Other states? Choice of law issues?	

WHEN:	
Is it needed?	
Deadlines/Priorities with other work?	
Exhaustive research or quick answer? Recent case law only? Specific result?	

HOW:	
Long should I spend on this?	