

38 IDEAS FOR QUICK PARTS

Stumped for ideas for where you can use Quick Parts? Just off the top of my head, I came up with 38 ideas for text snippets you should consider saving to Quick Parts. After looking at this, you may come up with some others, based on the kinds of documents you do every day.

PLEADINGS

Pleadings are just ripe for innovation! Think about all the repeatable elements (not repeatable documents – *elements*) you could have at-the-ready to drop into a new document:

- Case caption table
- Certificates of Service
- Notary/verification blocks for discovery responses
- Signature blocks
- "Of Counsel" blocks
- Standard discovery objections
- Auto numbered headings (First Affirmative Defense, etc.)
- Frequent discovery requests (*e.g.*, request name, address, phone & current employer of respondent)
- Notice of Filing/Serving Discovery language
- Definitions section of discovery requests
- Instructions for responding to discovery
- Standard "stipulation of dismissal" paragraph
- Table for listing counsel in jointly e-signed pleadings incl. consent statement
- Pleading index table
- "[State or Federal] Rules of Civil Procedure" (formatted)

CORPORATE

Those of you who actively work in a practice focused on business formation and other corporate documents can probably come up with a more extensive list, but here are a few suggestions:

- Notary acknowledgements
- Page X of Y footer
- Header for signature pages
- Ordinal dates

WILLS, ESTATES & TRUSTS

You may have entire document types that can be repurposed for new clients, but I'm betting you've got some elements you'd like to drop into new documents at will (no pun intended!), such as:

- Footer with "Page X of Y" and "Initials: ____"
- Date or SaveDate in ordinal format (e.g., 2nd day of February)
- Table for listing beneficiaries/heirs at law with addresses, etc.

EMAILS

Even some current Quick Parts users don't realize this feature's available in Outlook, too. Here's how I use it in emails; I'll bet you can come up with others:

- Frequent autoresponder
- Check request/credit card charge/reimbursement to firm accountant
- Wiring instructions
- Office directions & nearby parking information

LETTERS

Whether you're working in other people's documents or creating your own, here are example elements you can re-use over and over:

- SaveDate in appropriate format
- Signature block
- 2nd page header with auto page numbers and SaveDate
- Language for letter to subpoena recipient requesting executed certificate
- 10-day "respond to overdue discovery" letter language (a.k.a. Rule 37 letter)

CLIENT REPORTS

Some clients require you submit a regular report of matter activity. Consider saving “genericized” elements like these:

- Table for key dates & budget info
- Typical section headings (parties, facts, recent activities, etc.)
- Budget table

MISCELLANEOUS

Ah, the miscellaneous category. These elements could get dropped into virtually any sort of document:

- Firm name and address
- Footer with doc ID and page number
- Custom watermarks like DRAFT or CONFIDENTIAL

Not sure what a “Quick Part” is? Check out the video at legalofficeguru.com/adf-plc-1.

If you like to pass these tips along to a colleague, you're free to do so, as long as you pass along the document in its entirety.

If you'd like to get more tips and tricks from Legal Office Guru, here's where I hang out on social media:

<http://www.linkedin.com/in/deborahsavadra>

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Thanks for reading,

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