

## Deal Sheet Guide

### What a Deal Sheet Is

A deal sheet is a description of your specific work, beyond the brief description on your resume. It will typically list each deal or matter you have worked on as an attorney. “Representative Matters” is the title litigators traditionally give this document. Transactional lawyers may call it “Representative Transactions” or a “Transactional Deal Sheet.”

### Purpose of a Deal Sheet

If you have extensive experience that will not fit onto a one- or two-page (depending on your experience) resume, consider creating a Deal Sheet to fully describe what you have worked on and the specific roles you took in these matters. This is especially helpful if you are a more junior associate, to demonstrate your involvement in the substantive experience you have gained during your short time in practice. As a rule of thumb, create a deal sheet if you have enough matters that will not fit on a one-page resume.

### What to Include

Describe your matters clearly and concisely, while providing as much detail as will illustrate your particular role on a deal. Give an indication of the scope or size of a matter. Transactional attorneys will include dollar amounts (subject to confidentiality). Litigators may indicate the size of a matter in terms of dollar value or number of plaintiffs. Real estate lawyers might indicate the square feet of the premises in describing leases. If doing so would not violate a deal or matter’s confidentiality, include the month and year.

Partners and senior associates can be more general without details of your specific role on a matter, as you may have been running the deal.

Example: Represented X Company in the October 2019 \$8B acquisition of Y Company,” with a few additional details about the largest items that you oversaw.

Example: Defended large power company in attempted wage-and-hour class action lawsuit filed in Northern District of Illinois; succeeded in defeating class certification.

If you are a mid-level or junior associate, you will want to include more details about what you personally handled. The level of detail should not be excessive, however – generally, it should not take up more than 4 or 5 lines.

Example: Represented X Company in the October 2019 \$8B acquisition of Y Company. Coordinated due diligence; drafted diligence report; revised stock purchase agreement; drafted and negotiated transfer agreements; etc.

Example: Defended large power company in attempted wage-and-hour class action lawsuit filed in Northern District of Illinois; succeeded in defeating class certification. Interviewed expert witnesses; drafted motion to dismiss; drafted answer; supervised and directed three-person document review team; took depositions of plaintiffs; defended deposition of company witness.

In describing your deals, list any unusual, complicated, or interesting legal issues that arose. Include how you resolved the matters, too, if doing so would not violate confidentiality.

Include matters that did not necessarily have a favorable ending. Although you should certainly include any “wins,” do not leave out something that could demonstrate a skillset or novel issue that is not illustrated elsewhere on your deal sheet. For deals that fail to close, you can list the matter on your deal sheet, but indicate that the transaction was cancelled before financing, for example.

### **Confidentiality**

Do NOT include confidential information on your deal sheet. If a deal is listed on your firm’s website (press releases, for example), you can list client names. Otherwise, assume confidentiality – include some details, but keep it general – list “Fortune 100 insurance company” or “large auto manufacturer” rather than a specific company name, for example. Be sure that the way you describe the deal or matter does not allow the reader to guess the client’s identity.

### **Organizing Your Deal Sheet**

Separate your deal sheet into labeled sections – transactional lawyers might have categories such as “Mergers & Acquisitions,” “Investment Funds,” and “Debt Finance.” Litigators might include “Commercial Litigation,” “Arbitration,” and perhaps even “Pro Bono,” if they you the lead on arguments and depositions. If you are highly specialized within a practice area, your section descriptions might be narrower – a Labor & Employment attorney may list “Title VII,” “ADEA,” and “ADA” separately if they have extensive litigation experience in all three.

The specific categories you use matter far less than organizing them in a way that makes sense – avoid having pages full of deal descriptions, as you want to logically organize matters so that a potential employer could skim your resume in under a minute and have a good understanding of what you have accomplished. If you have two or three major categories, you can group the few remaining transactions or matters you did not categorize above into one additional section at the bottom (“Tax, Corporate Governance, and Real Estate,” for example).

Within each labeled section of your deal sheet, list the most important deals or matters first or list them in descending chronological order (most recent first). Often, these two strategies will have the same results, as you will take a larger role in matters as you gain more experience.

Avoid being overly repetitive. Even though this is where you can list out each deal separately, if you have played the exact same role on dozens of IPOs, for example, you do not want to list each one separately and bore your reader – instead, combine them in describing the role, and state that the IPOs ranged from X to Y size.

**Potential Pitfalls**

In addition to confidentiality, be mindful of accuracy. Avoid “puffing up” your experience, as it will be plainly clear if you have done so in an interview. In an interview, you should be able to speak about any detail listed on the sheet and answer questions about your role, key issues, and how you resolved them. If you were only involved in a deal peripherally (low-level due diligence or document review), do not include it on your deal sheet.

**Steps to Take Now**

Going forward, keep a running deal sheet on every transaction or matter you work on in practice, so that you can always create a formal deal sheet to submit to a new potential employer if needed. It may even help you make a case for a raise or promotion with your current employer, or you could use a deal sheet in another format for client development or deal pitches.