



Classification:  
Trademark

## TM10 Assessment, Development, and Administration Code Set

Fact investigation and development, analysis and strategy, document and file management, and budgeting.

- TM10.10      **Fact Investigation and Development**  
Investigating and understanding the facts of a matter. Includes initial meeting to discuss new matter, interviewing client personnel and potential witnesses, reviewing documents to learn the facts of a potential case, working with an investigator, and all related communications and correspondence.
- TM10.15      **Analysis/Strategy**  
The thinking, strategizing, and planning for a case. Includes discussions, writing, and meetings on case strategy. Also includes initial legal research for case assessment purposes and legal research for developing a basic case strategy.
- TM10.20      **Document/File Management**  
Creating and populating document and other databases or filing systems. Includes the planning, design, and overall management of this process.
- TM10.25      **Budgeting**  
Developing, negotiating, and revising the budget for a matter.
- TM10.30      **Other Assessment, Development, or Administration**  
The assessment, development, administration and other activities that cannot be included under another category.