

**EXECUTIVE SUMMARY ("Short Form")**

Date prepared: \_\_\_\_\_

Date last updated: \_\_\_\_\_

**Matter/Dispute**

**Claimant**

**Type of Claim**

**Amount of Claim**

**Business Unit(s) Affected**

**Current Status:**  Court  Arbitration  Mediation  Unassisted Negotiation  
 Other (*specify*): \_\_\_\_\_

**Assessment of Issues and Outcomes including Rationale**

(Include goals and objectives for all parties to the dispute)

**Identification of Interests: Ours/Theirs/Joint**

**Assessment of Settlement Value**

(Identify the range of monetary settlement that would be a good result and identify any non-monetary solutions with the potential to resolve the dispute)

**Proposed Resolution Strategy & Rationale including Special Circumstances Affecting Strategy**

- *Use decision tree analysis or summarize:*
  - *Resolution phases*
  - *Time frames*
  - *Preliminary litigation management plan*
  - *Budget/costs including counsel fees, forum fees and liability estimates*  
*(Total budget for short matters; 12 month budget with "ballpark" totals for prolonged matters)*

*(Optional: Attach Decision Tree Analysis, if appropriate)*