



Tips for Filling Out the Client Matter Spreadsheet

- **The focus first needs to be current clients that you are actively doing work for at the time you start.**
- **The second focus is on past clients that you think are critical and expect to do work for again in the near future.**
- Then we can focus on past clients that aren't critical, but are still material, that you expect to do work for again.
- Any clients after that, we can just input as the need comes up.

