

A lawyer's guide to managing the joint report process

An insider's perspective for getting it right



A meaningful discussion between experts is key

Experts should meet and genuinely discuss the issues at hand, even if the experts believe they understand each other's perspectives. If you foresee an issue with this occurring, consider using a facilitator to help guide the discussion.



Experience matters more than having your expert write the first draft

Don't get hung-up about having your expert draft the first version of the joint report. The sequence of previous expert reports is often the logical basis for which expert should commence drafting the joint report. As long as your expert is experienced in the process of joint reports, it should make no difference whether they 'go first' or not.



Agreeing orders can address instructed assumptions

Where experts have different instructions, a joint report is unlikely to uncover additional areas of agreement. Whilst instructions on the opposing side can be challenged, ambiguity may be eliminated by agreeing orders for the experts to address key issues, including matters on which they are instructed.



Don't underestimate the time required to prepare a joint report

It is not uncommon for 10+ versions of a draft joint report to pass between the experts before the final report is agreed. Timelines are important to set expectations when it comes to advising clients and managing costs, but an unrealistic timeline will impact the quality and effectiveness of the joint report.

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