

## **INTA Publications Committee**

### **Publications Partnerships Subcommittee**

#### **GUIDELINES FOR DRAFTING A PRACTITIONERS' CHECKLIST**

The INTA Publications Committee produces and shepherds several types of resources for use by INTA members. These include [Fact Sheets](#), [Industry Impressions](#) and [Practitioners' Checklists](#). These guidelines provide a framework for authors in drafting Practitioners' Checklists.

#### **A. General**

Practitioners' Checklists provide practical expertise on a single topic of interest without citations or reference to external sources. For example, the subjects of current Practitioners' Checklists include: [Trademark Audits](#); [Use of Surveys and Survey Experts in Trademark Disputes](#); [Trademark Clearance and Enforcement for Mobile Applications](#); [Sports Mascot Creation and Clearance](#); [Cease and Desist Letters](#); [Trademark Due Diligence](#); and [Tax and Trademark Planning Pointers for Trademark Practitioners](#), among others.

Practitioners' Checklists may be written by a single author or by small groups of coauthors (who may be members of an INTA Committee or Subcommittee).

Before deciding on a topic and submitting your proposal, please review the existing Checklists to ensure that your topic has not been addressed already and to become familiar with the Practitioners' Checklists format.

#### **B. Format**

Practitioners' Checklists are helpful training and management tools that provide guidance on how to perform certain tasks. A Practitioners' Checklist can outline a list of steps or actions to follow for performing the task. It can also outline a list of documents or requirements for completing the task.

The main body of the document should consist of a checklist that may be organized by subtopics if appropriate.

Each item on the Practitioners' Checklist should be delineated with a bullet or checkbox. The bulleted items can include a brief written explanation next to the item for the corresponding step, requirement, document, or action. The explanation can provide guidance on how to complete the item, where to locate more information about the item, hyperlinks to document forms, or things to consider when performing the task.

Practitioners' Checklists generally range from 5 to 15 pages. Shorter topics may be more appropriate for Fact Sheets, while longer discussions or those including citations or case law may be more suitable for an Industry Impressions resource. Please see separate guidelines for other kinds of resources.

### **C. Introduction**

The Practitioners' Checklist should be prefaced by an introductory paragraph or statement setting out the objectives, purpose, and scope of the document, including what issues it is intended to address and why that information may be useful to brand practitioners. In some cases, it may be appropriate to explain any limitations of the subject matter, whether the content is jurisdiction-specific, and/or any specific topics that may not be addressed.

### **D. Audience**

Practitioners' Checklists are mainly geared towards lawyers, including in-house and outside counsel. However, given that Practitioners' Checklists provide practical expert advice on a single topic of interest, they may also be of interest to non-lawyers, such as non-attorney trademark professionals, marketing teams, business owners, and entrepreneurs.