



3 Steps for Making the Relationship Work

To reap the most benefits when working with your economic expert, consider these steps:

- **Involve your CPA as early in the process as possible.** As straightforward as this concept may seem, it's often neglected. It's absolutely critical to get your expert in early to assist you in obtaining the right information upfront. Use your CPA from the start to formulate document requests, craft deposition questions, etc. By having your CPA involved throughout discovery, he or she can assist with any objections the other side may have and help ensure responsiveness from opposing counsel.
- **Make sure your CPA understands the key liability and damage issues.** Assume nothing! Make sure your accountant is thoroughly briefed on the key issues regarding both damages and liability. If your expert does not receive enough information on the liability issues, for example, his or her testimony could inadvertently hurt the client's liability argument.
- **Match skills to the case.** In addition to the obvious (reviewing credentials and matching skills to the needs of the case), you need to ensure that your expert has the right demeanor. Does the CPA come across as fair and believable? Is he or she able to render complicated, specialized opinions in a manner lay people will understand?