

Plaintiff: \_\_\_\_\_  
Address: \_\_\_\_\_  
-VS-  
Defendant: \_\_\_\_\_  
Address: \_\_\_\_\_

**Management Report by  
Parties and Proposed  
Scheduling for Case**

Case No. \_\_\_\_\_  
Case Code \_\_\_\_\_

1. **Meeting of parties.**

Pursuant to the Court's Standing Order for cases in the Commercial Docket (and Scheduling Order), a meeting was held on [Date] \_\_\_\_\_, 20\_\_\_\_ at [Time] \_\_\_\_\_ and was attended by:

For plaintiff [Name] \_\_\_\_\_.  
For defendant [Name] \_\_\_\_\_.

2. **Nature of case; summary of dispute.**

*[No more than 250 words for each litigant, or 500 words if a joint description.]*

3. **Status of pleadings.**

*[Describe status of pleadings, proposed amendments, service of process, addition of new parties, any initial pleading motions.]*

4. **Discovery Plan.**

The parties jointly propose to the Court the following discovery plan:  
*[Use separate paragraphs or subparagraphs as necessary if parties disagree.]*

Discovery will be needed on the following subjects:  
*[Brief description of subjects on which discovery will be needed.]*

All discovery commenced in time to be completed by [Date] \_\_\_\_\_.  
Discovery on issue for early discovery to be completed by [Date] \_\_\_\_\_.

Dates for preliminary disclosure of fact witness:  
From plaintiff: \_\_\_\_\_  
From defendant: \_\_\_\_\_

Maximum of \_\_\_\_\_ interrogatories by each party to any other party. *[Responses due \_\_\_\_\_ days after service.]*

Maximum of \_\_\_\_\_ requests for admission by each party to any other party. *[Responses due \_\_\_\_\_ days after service.]*

Maximum of \_\_\_\_\_ depositions by plaintiff and \_\_\_\_\_ by defendant.

Each deposition *[other than of \_\_\_\_\_]* limited to maximum of \_\_\_\_\_ hours unless extended by agreement of parties.

Disclosure and reports from retained experts due:  
From plaintiff: \_\_\_\_\_  
From defendant: \_\_\_\_\_

Supplementations under §804.01(5), Wis. Stats.  
*[List of dates or intervals]:* \_\_\_\_\_

5. **Preservation of Discoverable Information:**

The parties agree to handle the preservation of discoverable information in the following way:

6. **Electronically Stored Information:**

The parties agree to handle electronically stored information in the following way:

\_\_\_\_\_

7. **Other Items:**

*[Use separate paragraphs or subparagraphs as necessary if parties disagree.]*

Plaintiff/Defendant requests a protective order on materials and information provided in discovery.

The parties  request  do not request a conference with the Court before entry of the scheduling order.

The parties request a pretrial conference in [Month and Year] \_\_\_\_\_.

Plaintiff should be allowed until [Date] \_\_\_\_\_ to join additional parties and until [Date] \_\_\_\_\_ to amend the pleadings.

Defendant \_\_\_\_\_ should be allowed until [Date] \_\_\_\_\_ to join additional parties and until [Date] \_\_\_\_\_ to amend the pleadings.

All potentially dispositive motions should be filed by [Date] \_\_\_\_\_.

Settlement is

cannot be evaluated prior to [Date] \_\_\_\_\_.

the parties agree to use \_\_\_\_\_ as a mediator in this matter. If there is no agreed mediator, then the parties agree to this process to select a mediator: \_\_\_\_\_.

Final lists of witnesses and exhibits should be due from plaintiff by [Date] \_\_\_\_\_ from defendant by [Date] \_\_\_\_\_.

Parties should have \_\_\_\_\_ days after service of final lists of witnesses and exhibits to list objections.

The case should be ready for trial by [Date] \_\_\_\_\_ and at this time is expected to take approximately [Length of time] \_\_\_\_\_.

**BY THE PARTIES:**

|                       |                        |
|-----------------------|------------------------|
| _____                 |                        |
| Plaintiff/Defendant   |                        |
| _____                 |                        |
| Name Printed or Typed |                        |
| _____                 |                        |
| Address               |                        |
| _____                 |                        |
| Email Address         | Telephone Number       |
| _____                 | _____                  |
| Date                  | State Bar No. (if any) |
| _____                 | _____                  |

|                       |                        |
|-----------------------|------------------------|
| _____                 |                        |
| Plaintiff/Defendant   |                        |
| _____                 |                        |
| Name Printed or Typed |                        |
| _____                 |                        |
| Address               |                        |
| _____                 |                        |
| Email Address         | Telephone Number       |
| _____                 | _____                  |
| Date                  | State Bar No. (if any) |
| _____                 | _____                  |

**DISTRIBUTION:**

1. Court
2. Plaintiff
3. Defendant
4. Other: \_\_\_\_\_