

8 Tips for Professional Diagrams Across Your Firm

How lawyers and accountants can create professional, clear, and engaging diagrams – consistently.

Whether you are working on mergers and acquisitions or asset arrangements to optimize tax scenarios, diagrams are valuable communication tools. But they can be challenging to create! These 8 tips will help you and your team to create clear and attractive diagrams easily and quickly, every single time.

1 Use a specialized diagramming solution

Tools like PowerPoint, Visio, or Excel are inefficient. They do not have unique features meant to streamline the specialized diagrams that firms create. Solutions like Blue J Diagrams are designed for lawyers and accountants to quickly create diagrams that look professional and engaging.

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2 Use common industry shapes

Use shapes that conform to industry practices, such as an **oval in a rectangle for disregarded entities**. With Blue J Diagrams, you can select shapes from the toolbar in the editor or indicate in the Tax Treatment field that your corporation is treated as a disregarded entity (for example), which automatically changes the shape for you!



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3 Capture all the relevant data in one place

Keep your diagrams and their relevant data together to make them as clear and informative as possible. For example, when you diagram a transaction in Blue J Diagrams, you can input all the relevant information pertaining to the shares that are being transferred directly into the fields the diagram editor allows. This way, all relevant data is collected directly in your diagram, and when you export the diagram, the data comes with it.



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4 Start with an example or template

Whether you're a new practitioner or working on a new diagram type, don't start from scratch! Many online publications provide standard diagram examples or revenue ruling diagrams that you can reference. Solutions like Blue J Diagrams provide editable diagrams for a wide range of scenarios that you can use to get started.



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5 Apply different types of lines and arrows

Why limit yourself on how you connect different types of entities in your diagrams? Use curved lines, dotted lines, 90° lines, dissolved lines, and solid lines in your diagram. This is an effective way to capture different actions and processes visually.



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6 Apply clear labels and titles

The placement of labels and titles is important. It is helpful when certain lines indicate the percentage of ownership transfer, or which step is being visualized in a multi-step process. With a tool like Blue J Diagrams, you can add labels to any line and place them anywhere along the line, or add them directly to each entity.



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7 Make use of "negative space"

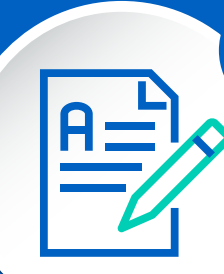
Negative space is the empty space between objects. Rather than create a cluttered diagram, open it up and leave a generous amount of negative space between entities. This allows you to provide as much detail as possible, without a busy design. Your diagram will be far easier to read and understand.



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8 Include explanations where necessary

Provide explanations as part of your diagram in a text box. This way anyone can look at your diagram and understand what is happening at each stage. You are able to provide context and answer any questions that may arise as your diagram is reviewed.



For more resources on creating and collaborating on tax diagrams, visit bluej.com