

In-House Corner: Keeping Sane (Or Not) During Proxy Season – Part 2

This feature of our blog is where our in-house readers share tips, anecdotes and thoughts about things that come up in their daily practice. We received so much feedback on the [first blog](#) about the techniques or routines (or bad habits) to help keep one sane during the proxy season that we decided to post a second installment [feel free to ping me and share your thoughts – they will be posted anonymously or with attribution, whichever you desire]:

1. "Sanity is hard to come by. Thank goodness Pandora works on my laptop as long as I have WiFi so I can take a music break here and there. I will provide my Pandora stations only upon personal request. However, the one bad habit I always run into is falling behind on the distribution schedule. This is going to happen – life (and work) intervenes against any plan, no matter how well intended. The best defense is a viable offense: the schedule itself should have flexibility built in and perhaps a distribution or two "extra" so if they are missed it does not throw off the entire timeline." – Jeff Taylor

2. "Keep your expectations realistic and accept up front that your team will miss a deadline, make a mistake and run into a time-crunch-induced schedule disruption. Once you let those worries go before the season starts, then focus on the big stuff – the things that have to be completely right and the deadlines that don't have any flexibility." - Katrina & the Waves Doe

3. "Make a realistic timeline and stick to it, but also make sure the timeline is flexible enough to deal with the surprises that will come up." – Stephen A. Smith Doe

4. "Be clear about data ownership, and require data owners to certify the data provided." – Sue Bird Doe

5. "Although a lot of time and effort goes into the sections that are included for communication - and because they are important to your shareholders - remember to keep focused on the legal requirements and triple-check every number. And if you have shareholder proposals, open a dialogue and keep it open so that you know what to expect when the annual meeting rolls around." – Bernie Mac Doe

6. "When you get towards the end, find some fresh eyes for a review – you'll be amazed what they'll see that you don't." – Caren Merrick Doe

7. "Do not look at it after you file. It's done. No good can come from finding the typo that your entire working group missed." – Melanie Martinez Doe

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