

# Take Back Your Time: A Practical Guide to Task Tracking, Delegation, and Block Scheduling

**Block scheduling is a key tool for getting more essential work done and thereby building a more predictable, profitable practice.**

BY BRENT J. HOEFT

Have you ever ended a long day at the office thinking, *I was busy every minute of the day today... and yet somehow not a single task on my list was checked off?* If you have, then you are not alone. Attorneys often find themselves trapped in an unrelenting vortex of email, administrative tasks, client demands, and the occasional crisis that arrives at 4:59 p.m.

But there is good news. It is possible to reclaim control of your time and your mental well-being. Two reasonably simple techniques may help you in that reclamation: 1) task tracking with delegation and 2) block scheduling. These are not the only methods for tackling the time management issue, but they are two of my favorites, so I suggest giving them a try.<sup>1</sup>

## Why Time Tracking and Delegation Matter More Than You Think

Most attorneys believe they have a good general sense of how they spend their time. But then they track it and discover something shocking; for instance, they see that they've been spending four hours per day on email, scheduling, or administrative tasks that could easily be delegated. Even just waiting until the end of the day to track billable time has been shown to cost attorneys 10-15% of potential billable hours.<sup>2</sup>

Task tracking gives you data, not assumptions. Delegation analysis gives you task clarity. Block scheduling gives you control of your daily calendar.

Together, they help you:

- Identify the time wasters (hello, inbox).

- Spot tasks that could be delegated to staff or automated by technology.

- Free up time for attorney-only tasks such as legal analysis, client counseling, strategic planning, and revenue-generating work.

- Reduce burnout by preventing constant task switching.

- Build a more predictable, profitable practice.



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## Part 1: The Task-tracking and Delegation Exercise

This exercise takes one week. If you want to devote more than a week for more data, then try two weeks. But I would stop there or else you risk losing momentum and getting too bogged down in the process rather than the results.

**Track everything you do for one full week.** Yes, everything. If you open an email, note it. If you spend 10 minutes hunting for a document, write that down. If you accidentally spend 20 minutes researching the most ergonomic keyboard ... well, add that too.

Tips for success:

- To track this data, use a spreadsheet, notebook, or practice management software. Whatever method works better for you is the tool you should use.
- Record tasks in real time if possible. Memory fades quickly and we are not great at recreating in hindsight how we spend our time.

• Include small tasks because they do add up; although the task may have been small, the mental toll transitioning to that task and back is a much higher cost. Again, think of that email notification that interrupts you that you know the answer to so you stop what you are doing to answer the email and then switch back to the original task at hand. The cost of switching is not just the five minutes it took you to review, think, and reply. You need to consider the mental toll of allowing the small interruptions to occur multiple times every day.

This exercise is a no-judgment zone. This is data gathering, not self-flagellation.

See the accompanying chart as an example of what a log should include.

**Code each task using three categories.** After the end of each day (or at the end of the week if you prefer), think about the tasks and label each task with one of the following:

The **Delegate** category are tasks that can be delegated to staff or technology. These tasks do not require legal

Task	Description	Start time	End Time	Duration	Code/Category
Enter what the task is	Enter a brief description	Time Started	Time ended	How many minutes?	<ul style="list-style-type: none"> <li>• “Delegate” (can be delegated to tech or staff)</li> <li>• “Attorney” (can be delegated to another attorney)</li> <li>• “Me” (cannot be delegated to anyone else; requires you specifically)</li> </ul>

judgment, or they require only limited oversight and could be delegated to a legal assistant, paralegal, receptionist, or automation tools.

Examples include the following:

- Entering deadlines into a calendar
- Sending routine followup emails
- Creating standard documents or first drafts from templates
- Scanning, filing, or organizing digital documents
- Updating social media, marketing, and website(s)

The **Attorney** category are any tasks involving legal analysis, strategic decision-making, complex client counseling, court appearances, or drafting, reviewing, or signing certain documents. These tasks require an attorney but do not specifically require you. Obviously if you are the only attorney in the firm or there is no other attorney to reasonably delegate the task to, then this category merges with the next.

The **Me** category are tasks that are attorney level and also uniquely yours to do because they require certain expertise whether because of the client relationship, a supervisory obligation, or some other ethical requirement.

Keep in mind: The **Me** category should contain only things that you *must* do, not things that you will do yourself because it seems easier or faster to do so. Only tasks that truly require *you, and only you*, get this label.

**Analyze your week.** At the end of each day or if you prefer when your week is complete, tally up the numbers and determine:

- Total hours
- Hours by category or code
- Percentage of time spent on delegable work (the sum of categories 1 (Delegate) and 2 (Attorney))

If your numbers are large, do not be alarmed. Again, data not judgment here.

Now ask yourself:

*What would my practice look like if I gained 5-10 hours every week?*

*Which tasks caused stress or time (or both) but added no real value?*

*Which tasks could be easily done by staff members or technology with a checklist, template, or software?*

This is when change begins to take shape.

## Part 2: Delegation – Turning Data and Insight into Action

Now that you know how you spend your time, you can reassign tasks.

Delegation is a skill that needs to be developed. Ineffective delegation can cost your firm revenue and growth.<sup>3</sup> Understanding different mindsets and approaches to delegation is important.<sup>4</sup> The most straightforward strategy is to implement task-based delegation.<sup>5</sup> The first step is identifying what to delegate, and the next step is identifying to whom tasks should be delegated.<sup>6</sup> The list of daily tasks that can be delegated might be extensive. Trying to delegate all the tasks at once might be too big a project in and of itself. I recommend starting with the tasks that consume the most time, are least complex, are repetitive, or have an obvious technology or staff solution.

These might include the following:

- Scheduling and intake
- Billing and time entry
- Drafting routine letters
- Opening and closing files
- Formatting documents
- Entering data into case management

systems

• Updating social media, marketing, or websites

**Build systems to support delegation.** Sometimes people don't delegate tasks because they think that it would be easier or quicker to do the tasks themselves than to train someone else to do them. To effectively delegate tasks you will need to get the instructions, formats, or processes out of your head and into a format that someone can repeatedly visit for a refresher.<sup>7</sup> To assist with the delegated tasks, you will need to create things such as checklists, written workflows, screen recordings of processes, templates for documents and emails, and standardized naming conventions.

Having these tools easily accessible reduces errors, increases efficiency, builds trust with staff members, and prevents repeated requests from staff members that you show (or re-show) them how something is done.

**Use technology wisely.** Lawyers sometimes shy away from using technology as a solution to task delegation because they don't think of themselves as being tech savvy. However, you don't need to become a tech wizard; rather, you need to be competent in the use of specific tools that reduce work that doesn't require deep thinking.

There are many options available to learn software and technology. Software companies have demonstrations, walk-throughs, and customer service videos available for you to watch online. Technology reviewers provide more information and details about products than you could have ever known to ask about. There are online forums of users asking and answering about common issues with programs,

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and artificial intelligence (AI) tools that can access the entirety of the internet to assist you with information and learning. There are many low-cost and no-cost opportunities to learn.

Some common technology software solutions to think about and investigate are the following:

**Practice management software**

– These systems are affordable, user friendly, and capable of being your entire law office back end as well as part of the client-facing front end. These systems

have features such as client filing system, document storage, calendar, time and billing, client portals, document automation, basic accounting, and more.<sup>8</sup>

**Automated appointment scheduling**

– Implementing online calendar and scheduling is a great way to save administrative time. These systems work from your custom availability set in your work calendar and allow clients and potential clients to schedule appointments during specific times you have made available. These systems

reduce the back and forth and can be set up to provide auto-reminders about appointments, which reduce the number of no-shows.<sup>9</sup>

**Document automation tools**

– Software to create smart forms and templates, along with client questionnaires for automation of document creation, can substantially reduce errors and time to generate first drafts of documents. Many practice management systems offer basic document automation tools and more advanced document automation as an add on.<sup>10</sup>

**AI assistants for drafting, summarizing, or legal research**

– These tools are built for legal professionals specifically and are grounded in the libraries of trusted legal research companies. They increase productivity while decreasing research and summarization time.<sup>11</sup>

**Voice-to-text tools** – If you are a slow typer but much better at dictation, then you should investigate using the built-in dictation tools inside of Word or look at a stand-alone program.<sup>12</sup>

These are just a few suggestions for types of tools. There are many more beyond those mentioned so take some time to investigate these and other available solutions. Your future self will thank you.



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### Block Scheduling – Take Back Control of Your Schedule

Once you clean up your task list and determine what can be delegated, block scheduling will help you *control* your calendar instead of reacting to it. It reduces stress, protects focus, and keeps the practice running smoothly.

Think of block scheduling as grouping similar work into protected time blocks so you’re not constantly switching between tasks.<sup>13</sup>

Key benefits of block scheduling are that it:

- Reduces cognitive switching costs,
- Helps you stay proactive instead of reactive,
- Ensures important work is scheduled, and

- Creates predictable routines.

Here is an easy way to implement block scheduling. First, identify your work categories. These are unique to you and your practice. But some common ones for attorneys include:

- Email and other types of communication
- Client work
- Administrative tasks
- Billing and financial review
- Business development
- Court and meeting time
- Deep work and focused drafting

It is just as important to identify when you work best. Do not schedule deep, focused work for the time of day when you're typically most tired. Instead, schedule staff meetings or work that doesn't require concentration during those times. If you are not a morning person and it takes you some time to get your brain firing on all cylinders, then do not schedule your deep work first thing in the morning.

**Assign time blocks.** Now let's look at what a block schedule for a workday might look like. Here is an example:

**8:00-9:00 a.m.:** Administrative tasks and delegation review

**9:00-10:00 a.m.:** Email and communication (return phone calls)

**10:00-Noon:** Deep work and drafting

or client meetings

**Noon-1:00 p.m.:** Lunch or working lunch – emails and communication

**1:00-2:00 p.m.:** Meet with staff

**2:00-4:00 p.m.:** Client legal work or client meetings

**4:00-5:00 p.m.:** Email and communication

**5:00-5:30 p.m.:** Daily debrief and block planning for next day

**Protect the blocks.** Treat these blocks like appointments with your most important client – your future self. Everyone should understand that these blocks should not be interrupted unless there is a true emergency that needs immediate attention.

**Adjust weekly.** Your schedule should evolve based on your workload changes, court schedules, staff availability, and so on. Block scheduling is a system, not a prison. Planning your block for the week should be flexible and realistic. You should also revisit your weekly plan as your week progresses. Be consistent yet allow yourself a degree of flexibility with these block plans.

Be sure to leave enough buffer time for unexpected issues and allow flexibility to address truly urgent matters. Know yourself – do not schedule demanding work during your low-energy times. If you know that you are always

tired after lunch, then return phone calls and email during that period rather than blocking that time for drafting or other deep-focus work.

### Final Thoughts: Your Time Is Your Most Valuable Asset

Time is the one thing we cannot make more of or get back once it is gone. Solo and small-firm attorneys wear many hats, but not every hat has to sit on your head at the same time, and not every hat needs to be designed to fit only you. Task tracking shows where your time is going. Delegation frees up hours for meaningful legal work (or for going home before dark). Block scheduling helps you stay focused and intentional on the intended tasks.

You might not need a bigger firm. You might not need a clone. You might just need better systems and to hold yourself accountable to those systems.

Start with one week of tracking. Then delegate and hold yourself accountable to your block schedule each week. The results will speak loudly. Maybe even loudly enough that your future practice will thank you. **WL**

## ENDNOTES

<sup>1</sup>Univ. of Georgia Extension, *Time Management: 10 Strategies for Better Time Management*, Field Report C1042 (2024), <https://fieldreport.caes.uga.edu/publications/C1042/time-management-10-strategies-for-better-time-management/>; see also upGrad, *Top Time Management Techniques and Tools for 2025: Features and Benefits* (Aug. 22, 2025), <https://www.upgrad.com/blog/time-management-techniques-and-tools/>; Safe Productivity Team, *Time Management Strategies: 15 Proven Techniques for Maximum Productivity* (Sept. 24, 2025), <https://safeproductivity.org/guides/time-management-strategies/>.

<sup>2</sup>Tom Boster & Scott Brenann, *Why Poor Timekeeping Could Be Costing Your Firm (And How to Fix It)*, Legal Management (June 2021), <https://www.alanet.org/legal-management/2021/june/columns/why-poor-timekeeping-could-be-costing-your-firm-and-how-to-fix-it>.

<sup>3</sup>Eliot Gattegno, Athena, & Nadav Klein, *The Art of Delegation*, Insead Knowledge (Jan. 13, 2025), <https://knowledge.insead.edu/leadership-organisations/art-delegation>.

<sup>4</sup>*Id.*

<sup>5</sup>*Id.*

<sup>6</sup>Univ. of Minn. Off. of Hum. Res., *Delegation – Quick Guide to Delegation*, <https://hr.umn.edu/supervising/resources/Delegation>.

<sup>7</sup>*Id.*

<sup>8</sup>For a list of practice management software providers, see the State Bar of Wisconsin's Member Discount Page, <https://www.wisbar.org/aboutus/membership/membershipandbenefits/Pages/Case-Management-Software.aspx>.

<sup>9</sup>Some available options are Calendly, <https://calendly.com>; Microsoft Bookings (included with Microsoft 365 Business Basic or higher); and Acuity, <https://acuityscheduling.com>.

<sup>10</sup>There are also a couple stand-alone document automation programs, like Clio Draft, <https://www.clio.com/draft>; Gavel, <https://www.gavel.io>; and several products from TheFormTool, <https://theformtool.com/software-comparison>.

<sup>11</sup>See, for example, Clio Work, <https://www.clio.com/work/ai-legal-research>; vLex Vincent, <https://vlex.com/vincent>; Thomson Reuters CoCounsel Legal, <https://legal.thomsonreuters.com/en/products/cocounsel-legal>; Lexis Nexis Protégé, <https://www.lexisnexis.com/en-us/products/protége.page>.

<sup>12</sup>One such program is Nuance's Dragon Legal, <https://dragon.nuance.com/en-us/dragon-legal>.

<sup>13</sup>Todoist, *Time Blocking – Your Complete Guide to More Focused Work* (2025), <https://www.todoist.com/productivity-methods/time-blocking>; see also Cool Timer, *The Science Behind Effective Time Blocking Strategies* (Jan. 21, 2024), <https://cool-timer.com/blog-pages/science-behind-time-blocking>. **WL**