

As an attorney, your time is invaluable. How much of it is actually spent on tasks that require your expertise? This worksheet will help you assess your daily, monthly, and quarterly activities to identify where your time and energy are going—and where they should be.

By listing your tasks, you'll discover opportunities for delegation and gain clarity on what to focus on for greater productivity. Start by writing down everything you do over each month, both big and small. For task ideas, see sample tasks on page 2.

Be honest in the process. This exercise will help pinpoint tasks for delegation, allowing you to reclaim and bill more time! Ready to lighten your load? Schedule a free consultation with Woven Legal today.

Next, categorize your tasks on page 2 using these filters:

1. Essential Tasks: I'm the only one who can do this work. These require your legal expertise and belong on your to-do list.

2. Enjoyable Tasks: While I enjoy these tasks, they can easily be delegated to support staff. Passing them on helps protect my time.

3. Guilty Tasks: I dread doing these things so how can I ask anyone else to do them? Trust that others DO enjoy tasks you don't. Release control and gain time and mental energy.

4. Clock Robbers: These items may be unnecessary for anyone to perform. Consider deleting them unless they will move your practice forward.

Attorney Delegation Worksheet

KEEP	DELEGATE	DELEGATE	DELEGATE
(Tasks only YOU can complete for **your practice & business)**	**Tasks you love but others can handle (good for leadership, coaching, and development)**	**(Tasks you dislike but keep due to guilt. Support staff often enjoy these, believe it or not!)**	**(Tasks you hate but keep, despite knowing others can handle them well)**

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Sample Tasks

Leadership responsibilities	Blog writing	Email management	Invoicing
Attend conferences	Client follow-up	Expense tracking	Legal research
Hearings & depositions	Client intake	Goal tracking	Mail screening
Calendar management	Client updates	Gift buying	Employee goals
Case strategy	Collections	Holiday cards	Social media posting
Vision casting	Create/update policies	HR	Recruiting
Billing disputes	Deadline tracking	Press releases	Vendor management
Staff 1:1 meetings	Drafting legal documents	Pro-bono work	Workflow routing
CLE tracking	Personal tasks	Legal research trends	Billing