

Docketing dos and don'ts

Are poor docketing habits letting time and money slip through your fingers? Read on to learn how you can become a docketing dynamo and capture more time.

Many of you will painfully recall doing hand-written dockets on time sheets (and unfortunately, some of you will still be using time sheets – I won't mention any names). Your staff person will have (or still has) equally painful memories of the mindless task of entering this information into your accounting system.

Time sheets are bad news. They are not very efficient as the same information is transcribed at least twice. There's also lots of opportunity for errors, and even missing information all together. Throw out your time sheets and go electronic.

Electronic dockets are a must

Today, there are many excellent time/billing and accounting software products that make it dead-easy for you to directly enter time dockets on your own computer. Most of the practice management software packages have similar functionality.

When you enter your own dockets, you save time by eliminating the double-entry by your staff person, and more importantly, the opportunity for transcription errors. Once entered on a computer, dockets can go directly into accounting programs, correspondence or accounts as is necessary. If you are the road warrior type, remember that you can create electronic dockets on your laptop or PDA. The efficiency, extra speed and greater accuracy of electronic dockets makes them a no-brainer.

Now that we have you in the world of electronic dockets, and even if you were already there, here are some other pointers for capturing more of your precious time.

Docket throughout the day

You get to the end of a crazy day. You've been running around all day, responding to and sending e-mails, talking with clients on the phone, and drafting umpteen letters and documents. Time to pat yourself on the back and check your total time for the day.

You add it up – only 4.3 hours! You ask yourself: "Where did all my time go?" You move to disaster recovery mode. Time to try and rebuild the day. What did I work on? What telephone calls did I make? How long were they? How much time did I spend drafting the agreement on the Smith file? How many times was I interrupted while working on that agreement. You review your sent folder to try and figure out what e-mails you read and/or sent that day.

Stop! Trying to create dockets for work done earlier in the day (much less in the more distant past) is very time-consuming, and not likely to be very accurate or complete.

It is universally recognized that lawyers who create dockets contemporaneously with completing the task end up capturing a significantly greater portion of the work they have done – some studies suggest a gain of 20 per cent or more. Docket your work as you go.

Most time and billing programs have a timer feature to help track how much time you have spent on any given task. It

works just like a stopwatch. Most lawyers grossly under-estimate the time they spend on individual tasks. Try timing your own tasks: You will be shocked by how much time you are missing.

If you get interrupted while working on one task, pause or close the docket for it, and create a new docket for the new task. Reopen the original docket when you return to the task.

At the end of the day, you should still review your dockets. Look for missed time, and make any necessary corrections or additions while things are still fresh in your mind.

Docket in detail

Many time and billing programs have standard billing descriptions, such as "conference with client", or "review of correspondence." While these standard descriptions are convenient, they don't

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include nearly enough detail. Having detailed dockets is critical as a record of the work you did on a file, and for communicating to the client what was done.

A detailed docket looks something like this: “telephone conference with client re details of weekend access problems.” Or, “drafting of correspondence to client confirming instructions to skip zoning search.”

It will take you mere seconds to add a bit of extra detail to your docket entries. The ROI on those few seconds will be massive. Detailed dockets will help you refresh your mind as to the work that was done on a matter, even if it was in the distant past. You will also find that they give clients much less opportunity to complain about their accounts. If you have to make a submission as to costs, sue a client for fees, or appear before an assessment

officer, detailed dockets will make proving your fees were reasonable a slam dunk, and they quite possibly could save your skin in a malpractice claim.

Docket every minute you spend on a file

Don't pre-judge and write off time spent on a file as unnecessary by not docketing it on the day it was done. Docket everything and wait until you final or interim bill the file, at which time you can properly judge all the factors that determine what should be billed on the matter.

Docket all administrative and other non-billable time

Unfortunately, not all your time is billable. Inevitably you must spend time on many non-billable tasks: marketing, administration, training, CLE and so on. To assess your performance and under-

stand where your time is going, you need to understand how much time you are spending on all your non-billable tasks, and what they are. You can't do this without a complete record of your time – so docket everything.

Slice and dice your numbers

Lastly, with a more complete record of your billable and non-billable time, you have a rich set of data that helps you understand where you are spending your time, and how you can realign your tasks to increase your billable hours.

Throw-out those time sheets and get e-docketing!

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C A L E N D A R

Events calendar

September 7

Risk Management and Claims Prevention

Dan Pinnington, practicePRO
Aird & Berlis LLP, Toronto

September 12

Become a Roads Scholar – OBA CLE
TitlePLUS sponsoring
OBA, Toronto

September 20

The Annotated Agreement of Purchase and Sale for Residential Property Law – Law Society CLE

TitlePLUS sponsoring
Law Society, Toronto

September 21

Trusts & Estates dinner program
OBA

Solicitors' Negligence & Your Insurer: Reporting & Avoiding Claims

Deborah Petch, LAWPRO
OBA, Toronto

September 23

practicePRO Technology Breakfast
Living in a Paperless Office With Just One Filing Cabinet

Peter Henderson,
Kramer Henderson Melconian
LAWPRO, Toronto

September 26

Canadian Association of Paralegals
Annual Conference

Avoiding Malpractice and Liability Claims

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OBA, Toronto