Ep #53: Time Management Strategies You Need: Calendar Blocking and Calendar Bucketing

Full Episode Transcript

With Your Host

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John Grant: Over the last couple of episodes, we've been talking about the Agile practices of weekly planning meetings and daily standups, both of which use intentional feedback loops to help you and your team get better at managing commitments and delivering work. But there's still this nagging question. How do you actually fit all that work into your day?

Today I'm going to share a couple of related practices, calendar blocking and calendar bucketing, that will transform how you think about and use your finite capacity. And I'll show you why having a completely empty calendar isn't the blessing you might think it is. In fact, that blank space might be one of the biggest threats to your productivity and your ability to deliver on the commitments you've already made to your existing clients.

You're listening to the *Agile Attorney Podcast*. I'm John Grant, and I help legal professionals of all kinds build practices that are profitable, sustainable, and scalable for themselves and the communities they serve.

All right, so this week I want to tie a couple of the concepts we've been talking about for the last few weeks, which is starting with the weekly planning and weekly review cadence, and then looping into the daily standup cadence, so that we're really making sure that the most important things in our practice, and mostly that's gonna be client delivery work, but sometimes it's gonna be internal projects as well. Either way, we wanna make sure that on a weekly basis, we're identifying what are those projects or matters that absolutely positively need to make progress this week? And then what is the progress that we need to make?

And then we're going to use the daily stand-up cadence to make sure that ourselves and our team are really making sure that we are committing our finite capacity to those hot list items. And you may or may not have noticed over the last couple episodes, I've been really intentional about using the word commitment. So it's one thing to have an available set of tasks or things that you could be working on. But what we're trying to do in these weekly planning and review meetings and then again in these daily stand-up meetings is to really commit ourselves to that work and make sure that we are reserving a certain amount of our finite capacity.

And again, I'm going to go all the way back to episode two and the honest reckoning with capacity, right? We have to make sure that we are using our capacity in such a way that we are delivering the things that we are committing to deliver. And one of the ways that we mark that commitment is in the creation of the hot list, if we're talking about weekly planning and review or in the sort of statement of the things that I'm going to accomplish in the next day in the daily stand up.

But there's one other way of committing that some of you maybe are doing, but I'm not sure all of you are doing. And in fact, this episode is inspired by the fact that in working with one of my clients last week, she screen-shared her calendar with me at one point. And I know she's a listener to the podcast. So hi, I'm not going to call you out by name.

But one of the things that came up in the early part of our coaching call was that she was feeling underwater, right? She was feeling like there were a lot of things coming up in her practice that we're going to need her time and attention, and she wasn't sure where she was gonna find the time to do it all.

And this actually comes a little bit from a use of the intake pause, but maybe a little bit of a, I don't know what's the right word here, but not being fully honest with future capacity. So what happened with this team is they instituted an intake pause because they knew they were over capacity, but they sort of told all of their new potential clients that they would get back to them after the first of the year and now the first of the year has arrived, but they're still over capacity.

And so this is sort of, it's not uncommon for this to happen with intake pause, but one of the things that I think is important and actually we'll talk about a little bit in today's episode is understanding when our buckets of capacity are going to come available for new work and not overfilling those buckets when they arrive.

We may need to push them even further into the future. Or maybe not everybody gets an appointment in January when you've told someone first of the year. Maybe you're really intentional about only doing a few things a week or maybe only one or two a week and then everyone sort of schedules out into the future from there.

Anyway, either way, right, this attorney had gotten to the place where they were still really busy and then they were going to have this added demand of new client intake meetings or other things that were only going to add to that capacity. And at one point in the coaching call, she screen-shared her calendar with me. And the thing that struck me about her calendar was how much empty space was on it.

So there were blocks of time that were scheduled for meetings and appointments, but the bulk of the calendar was actually blank. And that's a really almost dangerous place to be because the message that that gives you and your team is that you have spare capacity. And of course, she had just gotten done telling me that that wasn't the case. She was feeling overcapacity.

So today's episode is going to be about two techniques for using your calendar to connect to those deliverables and those most important pieces of work that you've identified, again, in these weekly planning and daily standup cadences, to make sure that not only have you done the honest reckoning with capacity, but you've reserved a chunk of your capacity to try to ensure that you've done the work, right?

Another way to say this is to use that word commitment again. You want to commit on your calendar to getting a certain piece of work done or a certain type of work done. And that's the difference between calendar blocking and calendar bucketing that I'll get into just right now.

And I'll start with calendar blocking. And this is probably not the first time you've heard this term, right? A calendar block is basically a one-to-one relationship between an available block of time on your calendar and a particular work item or a particular task set. And it's the thing that we most commonly think of as an appointment, except we tend to reserve appointments for meetings with other people.

And what I want you to think about is reserving appointments for meetings with particular pieces of work, right? They can be a matter, they can be a task set, but when you have a one-to-one relationship between something that you need to accomplish, right, drafting a motion or responding to a client or doing a piece of research, whatever it happens to be, you want to actually block out a chunk of time on your calendar that is tied to that piece of work.

And for some reason, and I'm not sure exactly what it is, but attorneys are really reluctant to do this. And maybe it's people who are really reluctant to do it, not just attorneys, but I definitely see it as sort of this pattern or anti-pattern with a lot of my lawyer clients is that they think that they should just be able to sort of flow through the day and be productive as opposed to really committing to chunks of work and to blocks of time to accomplish those chunks of work.

Calendar bucketing on the other hand, and this isn't something that I hear talked about quite as much and you know I'm not even sure there might be terms for it other than bucketing it's just the one that I've come to be using more and more. But calendar bucketing is committing your available time and energy to a particular type of work even if you don't know exactly what you'll do when that particular bucket arrives.

And I'll give you an example of how I do this in my own workflow. I've got a calendar bucket every Friday morning that is blocked off for what I call Finance Friday. And as you can probably guess, Finance Friday is when I take care of the financial tasks associated with running my coaching and consulting business.

And there are certain things that I know are gonna come up pretty much every week on Finance Friday, looking at outstanding invoices that I've sent to my clients, looking at bills that I have for my various vendors and providers, making sure that those are paid on either side of the equation. Running my payroll is something that often comes up on that. Different things, but they come up on a regular basis.

Some other things come up less often. So for example, as I record this podcast, we're coming up on the 15th of January, which is the due date for the quarterly estimated tax payments. And so this past Friday, I made those and I made sure that I went to all of the various federal, state, and local estimated taxes that I have to make or have to pay and made those payments.

The nice thing or the thing I really like about calendar bucketing is that as things come in during the course of the week, I know that I don't have to stop whatever I'm doing on a Monday or Tuesday or Wednesday and deal with that finance thing because I'm going to handle it on Finance Friday.

And that's really freeing, it's really useful in terms of allowing me to engage in deeper work during the course of the week when I've got my capacity reserved for other things. Now, I happen to use a Kanban board when I'm marking things for Finance Friday and I've got a label for my cards that turns it a certain color that lets me know that these are finance tasks.

And then when my finance Friday bucket rolls around, I can go to my Kanban board, I can filter for just those finance tasks. I can spend a little bit of time prioritizing, making sure that I am taking care of the most important ones first in case I run out of time, but then moving those tasks all the way over into the done column and making sure that I've taken care of the things or at least enough things on that Friday that I can let it rest for another week.

And then when next week's Finance Friday comes along, I'm going to pick them up again. I've seen successful similar implementations on a Kanban board using a dedicated column where you just sort of literally have a bucket that you throw the finance tasks into. And then when the Finance Friday timeframe rolls around, you would prioritize tasks inside of that bucket and then knock them out one by one.

For those of you that aren't using a Kanban board yet, you can kind of do something similar using tags or labels for your email inbox or sometimes depending on your calendar system, when you have an appointment on that calendar, you can set up notes or other comments, whatever, and you can just sort of keep a running list of things that you need to do in that particular bucket when it arrives. But either way, it's this really great way of making sure that I am taking care of the financial tasks of my business. And you can do the same thing with marketing. You can do the same thing with technology.

One of the things I really love this for, and this is a concept I don't think I've talked about a lot on the podcast yet. I may have mentioned it before, but with a lot of my teams, I recommend that they engage in 5% time for systems improvement and doing work on the practice instead of in the practice.

And so there can be a 5% time bucket that comes up either a couple hours every week or half a day every other week where we're keeping track of templates that need to be updated, software that needs to be worked on, processes that need to be improved, policies that need to be documented. Whatever it happens to be, you can sort of have a bucket where you're capturing those demand items, right, those work items as they come up. But then when the calendar bucket rolls around, that's when you'll actually commit to doing the most important items on that list.

Okay, so one of the other things about both calendar blocking and calendar bucketing is they're both examples of a common Agile practice known as time boxing, which is basically saying, okay, I'm going to be really explicit about the amount of my time and energy, my capacity, that I'm going to commit to either a specific work item in the case of blocking or a type of work in the case of calendar bucketing. And at the end of that particular chunk of time, I'm going to be done. I'm going to have to move on to something else.

And I think maybe that's one of the reasons why a lot of lawyers are reluctant to commit to this practice is that there's sort of this notion, and it's probably more prevalent with hourly billers, that it takes what it takes in order to get work done. And I can't commit it to a calendar because I don't really know what it's gonna take before I get started. And I get that instinct, I get that fear.

Let me take calendar bucketing first and how we can respond to that, and then I'll turn to calendar blocking next. And I'll use my Finance Friday as an example again in calendar bucketing, right? I talked about my estimated quarterly tax payments. Those are a fixed date work item type, right? They have a true deadline. If I don't make my estimated payments by, in this case, the 15th of January, then I have missed an administrative deadline and there are consequences for missing that deadline.

So when I have that bucket on my calendar roll up and it hits that time on Friday mornings, then the first thing I do is look at all of the Finance Friday things that I have.

And if there's a fixed date work item type and the deadline is approaching, then I want to make sure that I get that fixed date item accomplished first, and then I can move on to the rest of my things. Once I've got those fixed date items, those deadline driven items taken care of, then for the most part, I'm going to take the work in a first-in, first-out order. And if you recall, I did a whole episode about this. It's episode 27, the importance of a first-in, first-out system.

But really, what I'm going to do is take the oldest things first under the assumption that is usually true, which is the longer something's been waiting, the better the outcomes are going to be if I take those old items and get them knocked out. Now, every so often, it's going to be the case that my block of time for Finance Friday expires before I get all of the items in my Finance Friday bucket done. And that's okay, because I've taken care of the deadline-driven ones, and then I've taken care of the oldest ones, and I'm basically making an intentional decision that the rest of them can wait until the next week's Finance Friday bucket arrives.

And this is sort of the key, right? I have committed to myself and to the people I work with that I'm gonna spend 1 hour a week doing the financial stuff. And I think that's more or less the right amount of time to commit. Every so often, it's gonna take less than 1 hour. Actually, most of the time it's gonna take less than 1 hour but every so often it's gonna take more than 1 hour and that's okay, it can roll over.

Now, if it happens to be that there are a lot of deadline driven things, right? This fixed date work item type and I don't get all of them done, now I have to be intentional as I reach the end of my Finance Friday bucket that I'm going to have to take certain items out of the Finance Friday list and actually block off other parts of my calendar to get them done. So, you know, it's sometimes going to be true that the work exceeds the capacity I've allotted to it. Sometimes I'm just going to let it roll. Sometimes I'm going to have to do something.

But either way, I'm going to be very intentional about making sure that I'm reserving the appropriate amount of my capacity to those finance tasks, week in and week out. With calendar blocking, right, and specifically with legal delivery work, which can be complicated, right? We aren't always able to estimate how much time it's going to take to write a motion or to do a piece of research, whatever it happens to be. And so this is where it can be challenging with these more open-ended tasks. How do I actually fit them into a particular block of time?

The other challenge with calendar blocking is that this is where the optimism bias kicks in again, and I've talked about that in the last few episodes. But, you know, we all have a tendency to underestimate how much time and effort a particular chunk of work is going to take. And we tend to overestimate our own capabilities or sort of the mental state and the energy that we're going to have when the time comes to actually sit down and do that work. And that's a tough combination.

There are a few practices that I think can help. And this is something, again, you're not going to get it right the first time you try it. It's a practice that you have to commit to, and you're gonna get better and better the more you sort of stick to this. You're gonna get better at estimating, you're gonna get better at actually delivering the work.

The first practice is to really commit to that block as being devoted to the work that you've assigned to it. And so that's going to mean turning off your email, at least making sure there's no dings or pop-ups that are going to distract you. Same thing on your phone. Throw your phone on do not disturb. If you work in an office, close your door. Some of you have do not disturb markers on your doors. Whatever you can do, make sure that you are removing as many distractions as you can when you're committing to a block of work. This is really consistent with the notions of deep work from the Cal Newport book.

The second thing is to commit to a deliverable of some sort that comes up at the end of that block. So let's say you're working on a complex motion. That's great.

And it's probably going to take multiple blocks of time in order to get that done, but you want to break it down into chunks of work. And there's a couple of ways to do it, right? One is the incremental building of, let's say, a motion, where you might block off a chunk of time to do the statement of facts, and then another chunk of time to do your statement of law, and then another chunk of time for your arguments and things like that. That is one way to do it. It's not necessarily the way I would recommend.

So I would think instead about doing a minimum viable product approach. So what I mean by that is, again, if it's a motion, coming up with what is your notion of a minimally viable motion that at the end of this first block of time, even though you don't intend to file it, if you needed to file it, you probably could, or at least you could with just a minimal amount of sort of polishing and updating.

So if your full motion is gonna contain maybe three different arguments, your minimum viable motion might just be your best argument, your one good argument. And maybe at the end of this minimum viable motion, you're not even making that argument the best way that you possibly can, but at least you've made it.

One of the keys to this MVP thing is that it has to be viable. So that means, you know, there has to be at least a basic intro. There has to be at least a basic statement of facts. There has to be at least a basic explanation of the law and then the argument itself. And then a closing, of course, too.

And so it's a different way of attacking this thing, but it's something that can be useful. Even if that MVP approach doesn't resonate with you, either way, coming back to sort of tying the block of time that you've allocated to some sort of tangible manifestation of progress that you've made at the end of that block. So there has to be a deliverable of some sort.

And again, whether that deliverable is the sort of MVP approach or whether that deliverable is more of an incremental build or a work breakdown structure approach, I don't feel strongly either way as long as you are actually creating a deliverable at the end. And ideally that deliverable would be something that you actually deliver to somebody else.

So maybe if you're an associate or paralegal and you're doing a chunk of work in a calendar block, at the end of it, you would send whatever you've got to the senior attorney for review. So you get some feedback. It's another form of feedback loop. So you get that feedback, you know whether you're on the right track, you know whether you need to make course corrections, et cetera.

Either way, whether we're using calendar buckets or calendar blocks, we're really trying to commit to a fixed amount of time, because there's something about having that timer expire that tends to focus our brains and make us better at actually sticking to the topic that we're supposed to be doing in that block or that bucket, as opposed to having it just be sort of an open-ended time for you to be working on things.

So going back to this client of mine that had lots of blank space on her calendar, the idea here, whether you're using blocks or buckets or ideally both, is that your calendar is going to look really full. And that's by design. That's what we want. We want you to be able to have that sort of visual look a little bit different from a Kanban's making work visible.

In this case, in that calendar view, however you set it up, you're going to see, oh, I'm at capacity or I'm over capacity, which is again, the most likely state for a lot of you. And that's gonna help you make better choices about how you prioritize your commitments to new pieces of work so that you can actually deliver on the commitments you've already made, right?

We want as many ways as possible to see the commitments that you've already made so that you don't sort of engage in the natural but suboptimal behavior of taking on new commitments, even though you haven't delivered on the commitments you've already made, right?

I've talked about it before on the podcast where if you let new work into your system when you're already over capacity, all you're doing is stealing from the commitments that you've already made to the clients whose work is in progress already. So another way of thinking of all of these visual management tools, right?

Kanban boards, calendar blocking, whatever, is that you are protecting the clients and the customers to whom you've already made commitments and making sure that you're reserving enough of your capacity to deliver on those commitments before you come in and make new commitments to new clients or new customers. One other thing I want to hit on, because it comes up sometimes when I suggest this method, is that it just feels really rigid to people and they want to have more flexibility in their day or in the way that they're sort of feeling about their work. And so I want to give you permission to horse trade between blocks and buckets or among different blocks or different buckets if that's what you need to do.

So, for example, if I have a client that absolutely needs to talk to me and the only time they're available is during my Finance Friday bucket, that's okay. I can move the Finance Friday bucket. Maybe I'll do it later in the day on Friday. Maybe I'll do it on Thursday afternoon. As long as I'm hitting on all the things, I can move my blocks or my buckets around.

So in order to get started with this practice, I think I might start by trying to identify certain buckets of work that you know you need to pay attention to on a periodic basis. I've mentioned Finance Friday. I've mentioned 5% time. Those are two examples. I know a lot of attorneys that I work with have specific windows where they do new client intake calls or maybe windows where they're trying to respond to email and, you know, get in touch with different client communications or opposing party communications or whatever needs to happen.

So those are great examples of that. I know, you know, a lot of people will like to do sort of an email jam, maybe first thing in the morning, maybe first thing after lunch, maybe last thing before you go home in the evening. But really making sure that you're tying your blocks of email work to calendar buckets, as opposed to sort of working on them willy-nilly during the course of the day where they can be distracting.

I even had one client once who took the Finance Friday concept and sort of ran with it. And she had a Marketing Monday and a Technology Tuesday and a Workflow Wednesday, and I forget what Thursday was, but you get the idea, right? So you can use specific days of the week to sort of tie these things that you know you need to do inside of your practice and make sure that you've got buckets of time that you're willing to commit to each of those activities.

The other practice, and this is flipping over to calendar blocks, is to be way more intentional and think about this idea of making appointments with the work, not just with other people. So when you need to do a particular drafting project, research project, whatever it happens to be, make an appointment, block off your calendar, commit to getting that thing done, ideally in the timeframe that you've allotted. And again, it's going to take some time to get better at estimating, to get better at really sticking to those blocks. But if you practice and you work on it, I promise you're going to get better.

All right, I'll leave it at that for today. A lot of you have been emailing me lately. It's great. I love it. Hopefully I'm getting back to you in a responsive enough way. I too have been sort of overcapacity lately, so I'm trying to eat my own dog food here. And sometimes I do let things go a little bit longer than I intend, but I do get to them eventually. So if you haven't heard from me, I promise that you will.

You can reach me at john.grant@agileattorney.com. As I've said before, if you enjoy the podcast, you know, forward it to a friend, forward it to a colleague. And then it also helps if you leave me a rating and review on either Apple Podcasts or Spotify.

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