# The Billable-Hour Leak Finder

*Walk your week through this worksheet and see how much time is sitting in the administrative pile*

Chapter 6 makes the fees argument plain: the money is not hiding in your billable work. It is hiding in the administrative pile that never touched a bill. Every hour spent retyping intake, renaming files, chasing signatures, and sending manual status updates is an hour of salary paid for busywork, not legal work.

This worksheet surfaces that pile. Walk each task through it, mark what is non-billable today, and identify what a **Track A** automation or a **Track B** AI step can pull off your team's plate. The total is the capacity you hand back to billable work, without gaming the fees duty, because none of it was ever on a client's invoice.

The fees duty governs what the AI saves on billable tasks. It has nothing to say about administrative overhead the firm was already absorbing. Automate that overhead, and the savings are yours.

## 1. Where the time goes

The billable hour rewards legal work. It punishes everything else. Every minute spent retyping an intake form, building a folder by hand, or chasing a signature is a minute you cannot bill and cannot recover. In most firms, those minutes add up faster than anyone tracks.

Chapter 6 draws the line clearly. Administrative overhead, the tasks that were never on a client's bill, is exactly the pile automation is built to clear. When you automate genuine overhead, the fees duty has nothing to say, because there was no client hour to give back. You are cutting your own cost and handing capacity back to the people whose time is worth the most.

This worksheet shows you how much capacity is sitting in that pile.

## 2. How to use this worksheet

1. **Walk your week.**
   Go through each pre-filled task and fill in your own estimate of hours spent per week per person. Do not guess at a firm-wide number yet. Start with one attorney, one paralegal, or one staff role.

2. **Add your own tasks.**
   Use the blank rows at the bottom for anything not listed that your team does by hand and no client ever sees a bill for.

3. **Read the track column.**
   Track A tasks are pure automation, structured data in and structured data out, with no AI step reading client content. Track B tasks require an AI step and carry the full five-duty discipline. Both tracks free time. The track tells you what to build and what obligations attach when you build it.

4. **Add it up.**
   Total the reclaimable hours in the last column. Multiply by the number of people doing that work. That is the weekly capacity you return to billable work.

> **Note.** The hours-per-week column is intentionally blank. Fill it in with your team's actual numbers. This worksheet surfaces the structure of the problem. Your own numbers tell you the size of it.

## 3. The leak finder worksheet

| Task | Hours per week | Billable today? | Reclaimable? |
|---|---|---|---|
| **Retyping intake into the matter system**<br>A consultation form or questionnaire is filled out, then re-entered by hand into the practice management system. | | No | TRACK A |
| **Renaming and filing documents**<br>Received or drafted documents are renamed to a convention and moved into the right matter folder by hand. | | No | TRACK A |
| **Building matter folders**<br>Opening a new matter means creating the folder structure by hand. Every matter, every time. | | No | TRACK A |
| **Entering deadlines into the calendar**<br>Court dates, filing deadlines, and response dates are keyed into the calendar from orders or notices. | | No | TRACK A |
| **Sending manual status updates to clients**<br>A staff member drafts and sends an update on matter activity that the system already knows. | | No | TRACK A baseline; TRACK B if an AI step writes the narrative |
| **Assembling the engagement letter**<br>The letter is built by opening a prior version, saving a copy, and replacing names and terms by hand. | | No | TRACK A |

| Task | Hours per week | Billable today? | Reclaimable? |
| --- | --- | --- | --- |
| **Updating the same information across multiple systems**<br>A status change on a matter is entered separately in the practice management system, the billing system, and a tracking sheet. | | No | TRACK A |
| **Chasing signatures on engagement letters and retainer agreements**<br>A staff member follows up by phone or email when a document sent for signature has not come back. | | No | TRACK A |
| **Manually logging time entries after the fact**<br>Attorneys reconstruct what they did earlier in the day or week and key time entries from memory. | | No | TRACK A baseline capture; TRACK B if an AI step drafts the narrative |
| **Running the conflicts check by hand**<br>A new party name is searched against the client list manually before the matter is opened. | | No | TRACK A |
| **Sending appointment reminders**<br>A staff member calls or emails clients before consultations and hearings to confirm the time. | | No | TRACK A |
| **Routing inbound inquiries to the right person**<br>Web forms or email inquiries are read by a person and forwarded to the right practice group or attorney. | | No | TRACK A if fixed category fields route the inquiry; TRACK B if an AI step reads free-text and decides |
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| Task | Hours per week | Billable today? | Reclaimable? |
| --- | --- | --- | --- |
| | | | |
| **TOTAL reclaimable hours per week (per person)** | | | |

## 4. Add it up

Total the hours in the column for each row you filled in. That is your weekly overhead per person.

Multiply that total by the number of people doing that work in your firm. Multiply again by your billing weeks per year. The result is the annual capacity currently absorbed by tasks that no client ever paid for.

Every hour in that number is an hour that returns to billable work when the task is automated. The fees duty has nothing to say about it, because there was no client invoice involved. You are not cutting a bill. You are freeing your team.

> **Note.** Do not invent a dollar figure for this exercise. The capacity number is the point. What you choose to do with that capacity, bill more, take more work, reduce overhead cost, is a business decision that belongs to you, not to this worksheet.

## 5. What the track column means

Every task in the worksheet is marked with a track. The track tells you what kind of build reclaims the time and what obligations attach when you build it.

| Track | What it means | What attaches |
|---|---|---|
| TRACK A | Pure automation. Structured data goes in, structured data comes out. No AI step reads client content or produces an output you rely on. A form populates a field. A trigger fires a task. Logic executes exactly as written. | Vendor diligence and your data-protection duties. The AI-specific obligations do not attach. Business tier is the platform floor. |
| TRACK B | Automation with an AI step inside it. The moment an AI system reads client content and produces an output a person relies on, the task is Track B. One step is enough. | The full five-duty discipline applies: competence, confidentiality, supervision, fees, and candor. The platform floor rises. This is a deliberate choice, not a default. |

Several tasks in the worksheet show both tracks, with a baseline Track A version and a Track B enhancement that adds an AI step. Start on Track A. Move to Track B only when the AI step earns its place and you have built the supervision to match.

**How to use this.** This is a thinking tool, built to help you reason about your own firm. It is not a compliance guarantee and it is not legal advice. Where it states a rule, it states the rule as of July 18, 2026, and the law moves, so confirm the current rules in your jurisdiction with your own counsel before you rely on anything here.

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