

Organizational Techniques - Tickler and Chron File

By Chuck And Sue DeFiore

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One of the biggest problems we encounter in our consulting with businesses, and our students, is time management and organizational techniques. This article will concentrate on some good organizational strategies. Two of the best organizational techniques I have found over the years are the Tickler File and the Chron File. This article will concentrate on how to use them everyday in your business.

A Tickler file is used extensively in the legal arena. A Tickler file is a file in which you put items that you need to take care of by a certain date. For example, an accordion file is used in the legal office, the accordion file has dates from 1-31 with monthly folders (January-December). If a court case is to go to trial on June 13th with depositions to take place through May, the case would be put in the accordion file in April, so that letters could be sent out in April to those who need to be deposed in May. The letter for a particular individual would be placed in the appropriate day for May that the person was to come in, or even the day before with a note to call and remind this individual they have an appointment. Anyway you get the idea. The tickler file allows you to put notes, files or letters in them as a reminder (tickle your memory) for you to do something. The tickler file is also a great way to get all the papers off your desk. When I am done at the end of the day, I place my to do list (with the items to be done), in my tickler file. My tickler file is a legal size accordion file, which is numbered 1-31. I have made up my own monthly files. Yes, you can purchase manila files with the months already on them, however, they are expensive, an expense I don't think is necessary. My tickler file is in the drawer of my desk. When I am finished at the end of the day, all of the items I am still working on are placed in my tickler file for the next day. So the tickler file can serve a two-fold purpose, clearing off your desk at the end of the day, along with acting as reminder and keeping track of what needs to be done in the upcoming days and months for you.

For those of you running your own Lease Purchasing business it also allows you to tickle a reminder to yourself to run your ads on a consistent basis, utilize your marketing strategies, Real Estate meetings, speeches, and articles to write, along with the other items you need to do.

I know many of you use computer programs that act as tickler files do. This is fine, as long as you use them. I know you can set up a system like this one in Outlook and many of the Personal Management Programs. That's fine. However, I find that most people don't follow through with the computer programs, and have found when consulting with businesses that the old fashioned way makes them more comfortable, since they are handling paper and files and don't have to bring up a specific program to look for something. However, if you are more comfortable with a computer program, please feel free to employ one. Just remember, to be organized, you do have to use it.

Another issue that comes up quite often is finding a particular letter or memo in a file. One of the best ways to keep track of correspondence is by using a Chron File. A chron file is a chronological file of all the correspondence you send out on a monthly basis. You would have chron files for all twelve months with the letters sent out that month in date order. If you use client files, you can still use the chron file, just make a second copy of the letter for your chron file. It might seem extra work for you, however, I have found over time, not everyone can remember a particular clients' name, and it is much easier to remember they did a letter in a particular month, and find it that way. Chron files are very handy for those businesses that don't send out a lot of correspondence and don't want to have to make a file for one piece of correspondence. Your correspondence is organized by month and year and much easier to retrieve if you need to. I keep the current monthly chron file and the past two months in my desk drawer before my tickler file.

For those running a lease purchase business, your chron file is perfect for those follow-up letters from telephone calls to sellers, marketing letters to mortgage brokers, real estate agents, etc. You don't need to make a separate file for those type of letters, just place them in your chron file.

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