

# Taking Charge Of Your Files

By Chuck And Sue DeFiore

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One of the first steps is to box up last years files. However, before you do that be sure to go through your files and clean them out. The files that can take up a lot of space during the year, can be easily tossed. For example, your correspondence file, newsletter files, chron files. You can also combine your completed client files for the year, both seller and tenant buyers.

After you have gone through the paper file cabinet, be sure to do the same with your computer files. Years ago when computer memory was at a premium, people did not keep all the extraneous garbage on their computers, like people do today. Just like your paper files, move the files to disks or your zip drive if you need to, or just delete them. You don't need every letter you sent, every e-mail, or all the newsletters you've been meaning to read. Also go through your favorites and clean them out.

Treat your computer like memory was at a premium and you won't hold on to items you will never use. Unfortunately today everything is in gigabytes rather than megabytes.

After you have cleaned out the paper files and computer files, next step is to make up your files for this year.

Avery Label Pro is excellent for doing up file labels. In fact all types of labels. It allows you to run another set of general files out very quickly. Remember time management and organization are keys to not wasting your time. I'm sure that many of you are thinking boxing up and making up of files is a waste of time. However, when a client calls and you can't find something they want to know, it will become of paramount importance. So, keep your files organized, both paper and computer.

Once you have your files set for the new year, the next thing is to clean out the calendar or day planner you use. Change the pages. Tip, you can run day planner pages out of Outlook and then whole punch. A lot cheaper than buying the pages. This is also a great option for those of you without a day planner. Buy a small binder and make your own. Again, a lot less expensive option. Once your calendar is set up, be sure to pencil in your daily, weekly, and monthly goals, in addition to any standing appointments you have for the year. Last but not least, rubber band the pages from last year together and add it to your file box. For those of you using chron files be sure to place those in a separate file box, so you can very quickly put your hands on any of last year's correspondence.

Next is to set up your tickler file for the year. File any extraneous papers you keep in your tickler file

(e.g. calendar pages, meeting agendas, notes, etc.) Be sure all your month files are in order. Go through the January sections and place them in the appropriate date, so you will be ready for the first month of year's appointments.

Next is to deal with any outstanding mail from the last year. Answer it, read it, file it or toss it. This will ensure your mail folders are in order for the upcoming year.

For those of you doing lease purchasing, you will also want to check all your databases (prospects, sellers, tenant buyers, consulting jobs, pending properties, etc.) and diligently go through them to weed out those not producing results. You will also want to update your FSBO sites, and start making new calling lists for the new year.

Last but not least is to add up your expenses for the year. If you are using the monthly envelope method, total those for the year. If you are using Quickbooks or another type of accounting/bookkeeping program, run your numbers for the year (e.g. for expenses - supplies, telephone, fax, computer, office, utilities, etc.; for profits - consultations, assignment fees, notes, cash flow profits, etc. This will give you an idea of what you made after expenses. Then develop goals to do even better for the new year.

If you are unsure of any of the items mentioned in this article, check out the articles on our website for a more detailed treatise of what some of them are and how to use them.

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