

Taming the Paperwork Pile: The Telephone Log **by Kathy Lautz**

The small property owner is the driving force behind this series of articles on taming the paperwork pile. The small property owner tends to do everything by himself when possible.

Do you take telephone messages on little pieces of paper, maybe yellow sticky notes? Maybe you've gone a step further and you use the carbonless duplicate telephone message books designed for offices with multiple workers. Here's a better way. Get your self a spiral bound lined paper notebook. The most useful size is what we think of as half size, usually 5 ½" x 8 ½". These notebooks are readily available in the grocery store. Avoid the notebooks with perforated tear-out pages, because you'll be tempted to tear pages out. A standard 8 ½ x 11 notebook takes up too much room on your desk, unless you want to take lots of notes during a telephone or conference call.

One of the most useful features of this phone log is for tracking tenant maintenance requests.

Don't tear the pages of your log book out! This log book is designed to keep a permanent record of your phone calls, as well as any other discussions you may have, or items you want to keep track of. You can go so far as to number all the pages throughout the book when you first use it. Then if any pages are missing later, you'll be able to tell right away. If you need to remove information from your log book, take a photocopy of the page you need, but never tear it out.

This notebook doesn't have to be very neat. It is for you. But it should stay legible. Doodle somewhere else, and use the notebook just for information. Note the date and time of every business call in the left margin. Both calls that you receive and calls that you make should be entered into this log in chronological order.

If a follow up is required, draw a circle under the date and time entry you made. Then when your follow up is complete, just put a check mark in that circle. A follow-up can be something as simple as adding the contact information to your address book or computer program. Or if the needed follow-up is more complicated, make a notation by the first contact that you have opened a file for this particular project or issue.

One of the most useful features of this phone log is for tracking tenant maintenance requests. If you are in the habit of tracking all your calls, maintenance calls will automatically appear in the sequence in a convincing way. A problem tenant would have a hard time disputing the accuracy of your log, if his call were one of many in this system. Even if you only have a few units, it is entirely possible that one of your tenants could make life miserable for you about maintenance issues. You could even say to your maintenance request caller, "Today is April 3, at 5:30 pm. I'm logging your call and request into my phone log right now, okay?" then wait for acknowledgement from the tenant. You will be creating in the tenant's mind the accurate impression that you keep records, which should discourage tenants of ill will from taking advantage of you. The best thing to do is to get your tenant to sign a maintenance request, every time. We'll tackle this topic in a future column, but even if you don't use a maintenance request form system, your telephone log book can help you manage your requested maintenance items and other business, in a timely manner, with a great paper trail.

Once you get used to using this system you'll wonder how you ever functioned without it. You'll be pleased at your ability to leaf through the pages of your log book to refresh your memory about exactly what you talked about, when, and with whom.

Kathy Lautz is Managing Editor of the Apartment Owners Association and may be reached by calling (510) 769-7521.