

Getting Things Done!

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SOME time prior to 1900 a bank in the City of New York decided to buy a card ledger. This was a radical departure in those days of the Boston Ledger, and you may be sure that the decision to abandon books for cards was not reached without the approval of the bank's directors. The salesman who persuaded the bank to make this purchase from Library Bureau had initiative and resourcefulness. He needed these qualities, because the bank officials soon realized that they were confronted with the sizeable task of heading thousands of new ledger cards and transferring balances. Although no service organization was in existence at that time, the salesman acted upon impulse and advanced the suggestion, "Why not let Library Bureau do it for you?" Much to the surprise of this young man, the bank promptly accepted his offer and Library Bureau was thereby launched upon a career of service to American business. Without attempting to draw any inference, it should be noted that this enterprising young salesman later became President of Library Bureau, and did much to foster and promote the development of a wide variety of services in the field of indexing and filing.

Old-timers tell us that this first experience in the role of contractor for the installation of a business record was carried through to the complete satisfaction of the bank officers. It may well be imagined that Library Bureau's costs on that first job were somewhat disheartening, and proved conclusively the necessity for placing record installation responsibility in the hands of trained indexing personnel. The realization of this fact called for executive decision and official action, but it was not until several years later that the Board of Directors authorized the creation of what has now become the Records Analysis & Installation Department of Remington Rand Inc.

In the fifty-odd years of its business life this department has witnessed tremendous growth in the application of mechanical devices to the use of business records; yet the fundamentals of those records, and the reference needs of business have not changed. Ledgers still carry debits, credits and balances; but nimble-fingered and much more attrac-

tive "bookkeepers" now deftly speed posting operations, or with equal dexterity file invoice copies in equipment that requires no posting of accounts receivable ledger records.

Officials, executives and chief clerks still call on the file clerk for correspondence and other business records that may later be found under a pile of papers on the desk of the man who is sure he sent them to the file. These human tendencies continue although there is available for the modern file department too, a variety of equipment, devices, and systems to better control the errant mind of man, which alone seems to remain unchanged in a changing business world. Our predecessors struggled with spindle files, magazine files and similar crude devices designed primarily for the storage of papers, and for a time felt that their problems were solved with the advent of flat filing. This improvement was soon out-grown and vertical filing, with numeric folders and a card or book index, enjoyed several years of popularity. The modern filing cabinet, sleek and smooth, in dignified gray finish, now may be equipped with an equally attractive set of index guides, clearly printed and significantly colored, with captions that may be modified at will to meet the changing needs of the user. Printed and tabbed cards to control the circulation of records removed for reference, and appropriate forms to control the indexing of secondary names or subjects are available from stock. Ingenious sorting devices provide convenient access to material waiting to be filled.

The office equipment industry has created for the public need a vast number of other important improvements for the housing, protection, filing, control and productive use of the essential records of business. Less tangible, but in many respects equally important, is the organization and training of special personnel for analyzing, installing, reconditioning or reorganizing file and record systems. The idea of such a service took form and came into active existence more than fifty years ago. Its growth was slow, but it grew steadily on a solid foundation of accomplished results. It was evident from the start that skill and knowledge, plus experience, would add up to the ability to get things done. "Getting Things Done" has always been our objective as well as our purpose.

The most important evidence of success in accomplishing this objective may be found in thousands of better planned, more skillfully installed systems. Further evidence appears in the fact that annual volume now runs into six figures as more customers discover that a one-time investment for results of a professional character pays dividends that cannot be realized through amateur effort.

Records Analysis and Installation activities are conducted through

two distinct but closely associated operating departments, with personnel experienced in the study of file and record conditions, and familiar with business practice and procedures. The larger of these is the Records Installation Department, in which more than 100 Field Supervisors direct the work of numerous assistants, or personally put into effect plans previously made in conference with the Department Manager. Such plans frequently include consultation with the customer, and with our sales representative or analyst.

The Records Analysis Department is composed of those whose indexing and installation experience has shown that they have unusual analytical ability. In addition to the ability to secure facts, the Analyst must be capable of using the study of methods, procedures and reference use, to determine upon the best plan of approach to the solution of the problem. This, in turn, calls for a thorough working knowledge of good business practice, methods, systems and procedure, and the equipment and supplies appropriate to the requirement. Our sales representatives are capable of analyzing all usual requirements, but conditions are sometimes encountered which call for a survey that would take more time or demand a more extensive analysis than the Sales Department is prepared to undertake. It is at this juncture that the Analyst is equipped to take over and endeavor to work out the problem in co-operation with the Sales Department and the customer.

It is considered wise to restrict analysis activity to a specific objective. This may be a particular department, or a specific file or record. This is desirable because management decision can be secured more readily on such a basis, and because it is difficult for most organizations to assimilate too many changes at one time. Many worthwhile projects have suffered, or have been abandoned entirely because too much was attempted in one move. There are some projects that must be considered as a whole, but often more can be accomplished by dealing with one thing at a time.

The scope and extent of the record problems encountered are apparently without limit. To those engaged in this work it would seem that every known government and business office has, at some time, called upon us to assist in the study of its files and records. Our files contain hundreds of "case histories" on small business organizations but there are thousands more for the larger organizations and for City, County, State and Federal Government Departments. Record problems of somewhat similar character are found in many of the numerous departments of the several states. In recent memory are such departments as Motor Vehicle, Compensation Insurance, Welfare, Public Works and Buildings, Adjutant General, State Police, Alcoholic Beverage Control,

Waterways, Teachers' Retirement, Secretary of State and even the Executive Office of a well known Governor.

The analysis reports that preceded many of these installations covered specific problems similar to those we are accustomed to dealing with in commercial and industrial organizations; in banks, insurance companies, public utilities, etc. Requisition and Order Procedure, Contract Records, Purchase Records, Vendor and Price Records, Catalog Files, Contract Files and similar vital records are as important to government authorities as they are to business. Establishing a decimal classification for a Board of Education, or reorganizing a state department subject file, brings to the user the same important benefits that may be realized by any business firm. A Teachers' Retirement Record may have its counterpart in the visible personnel record of an oil company or a shipyard.

Our work at times consists of installing a single record or file, or it may involve a combination of centralized or co-ordinated records for which plans have been worked out by our Systems Sales technicians. Frequently the victim of an inadequate system realizes that there must be a better way, and calls upon us to make a study and submit ideas and recommendations. Our procedure in such cases is to make an examination of existing conditions, including an analysis of procedure, methods, reference use, activity and other pertinent factors. The basic facts are reduced to writing, often in the form of a chart supported by a report. When charts are practicable, columnar arrangement provides an orderly presentation of factual information that helps the customer to visualize our findings. Recommendations are briefed on the chart, and amplified where necessary in the report.

Some time ago we were asked to look into the files of a Secretary of State. Under the plan then existing, documents pertaining to the incorporation of foreign and domestic corporations doing business in the state were folded and placed in envelopes by year in which the papers were filed, with the result that related papers could be brought together only by search in many different places. These document envelopes, housed in three separate basement vaults, were so inaccessible and so inadequately indexed that delays of a week or more were frequently experienced by lawyers and others who had occasion to seek information.

Our recommendation, in brief, called for centralization of related records; the documents within the folder to be classified under such headings as Incorporation, Stock Issues, Annual Reports, Changes of Officers, Correspondence, etc. Supplementing this file a visible record

was recommended to carry in digest form such information as Change of Officers, Stock Issues, Payment of Fees, etc. Documents pertaining to defunct companies were to be weeded out and filed separately in alphabetic sequence. These comparatively simple recommendations merely illustrate the common sense treatment which so often will solve the annoying lack of organization, or method, that retards the operation of a public office or a private business. Hours, or even days, wasted in needless search can and should be devoted to more useful pursuits.

Much time and thought has been devoted to the question of inactive records, and a great deal has been written on Records Retirement, or Retention, Disposal, Destruction, etc. We had occasion several years ago to make a detailed study of this subject for a utility whose operations extended over many locations. The survey required the full time of five Analysts for nearly a year. The report submitted was a revelation to the management. Printed forms serving an identical purpose in different localities were of entirely different card or paper stock, in a variety of sizes and colors. Methods of housing and indexing varied according to the ideas of local management. The active life of the same record differed too, and no uniform practice was followed in determining when, where and how to transfer inactive material. Space-saving microfilm was used hardly at all. Often the less essential records were filed in insulated equipment, while vital records were exposed to fire hazards in ordinary steel files.

Our survey disclosed these facts, and resulted in a report and exhibits which included a sample of each form in use or in existence, with an accompanying digest on its use, purpose, quantity, active life, the retention schedule established by Federal Power Commission regulations, and the schedule under the regulations of the Utilities Commission of the State. In this instance the decision in regard to retention was governed largely by the requirements of the utility commissions, but it was not considered wise to follow those regulations blindly. Some of the records were ordered destroyed, others were reduced to microfilm and many were transferred to insulated filing equipment. The final decisions were made by the legal department, subject, however, to the decision of operating departments who might wish to retain certain record information beyond the legal requirement. In deciding upon a retention program it is necessary to consider both the legal requirement and the usefulness of the record to the operating departments of the organization. The analyst can produce the information from the files for the consideration of the executives, and can make

recommendations based upon her study and experience, thus providing a concise summary of facts for executive decision.

The time required for the completion of a contract depends upon the nature and extent of the work, and upon the available working space. An audit, or the installation of a small record may require only a few days, but the reconditioning of a large card index, or the organizing of a centralized file or record system may take months to complete. Our longest single contract lasted 7 years, and brought about a complete reorganization of several index departments in the home office of one of the largest indemnity insurance companies.

Several years ago a well known life insurance company in the Middle West authorized certain changes we had recommended in its Mortgage Department. The desired reorganization was completed on schedule, with results so favorable that we were asked to do a similar piece of work for another department. This was followed by still another, and then by more departments, until five years had passed and practically all departmental files had been revised, weeded out and brought into shape to give better service.

These were unusually long-term contracts performed by one or two individuals. More frequently large numbers of service personnel can be concentrated on a job to get it done in a relatively short time. Not many years ago we made an installation of Centralized Customer Records for a utility company with over 500,000 active accounts. This installation included the Redistricting of the meter reading routes, a new meter sheet for each meter location, a Service Record and Service Investigation Report system, consisting of three forms for each meter location, a Customer History and Deposit Record to be filed by name of customer, and two meter cards (one for meter test purposes, the other a meter history record) for each meter owned by the utility company.

In addition to the planning and organizing necessary for this job, our contract included the typing and checking of pertinent account information on each of 5,240,000 printed forms, and the sorting, arranging and filing of these forms in visible equipment. A portion of these records was available and in use within two months, and the entire job was completed in thirteen months with a staff of 10 Supervisors and 130 clerical assistants.

The manifold details peculiar to file and record service activities usually are not apparent to the uninitiated, but they are part of the daily life of the experienced Supervisor, Indexer or Analyst. It may be interesting to note that individual experience averages close to 10 years,

and that each is engaged on approximately five different types of contract per year.

A wise man once said that these services represent the crystallized experience of all the companies we have served. It might also be said that in the Analyst, Supervisor, or Indexer who undertakes the task there must exist the composite personality of a woman with knowledge, resourcefulness, tact and ability.

Sponsored and supported by adequate corporate responsibility, these services are today the most effective means of getting things done.



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