



CALENDARING TIPS FOR THE SMALL LAW FIRM

Whether you use a manual or an automated calendar system, it should be designed to ensure that you always know what's on your schedule and never miss deadlines. The following suggestions can improve the efficiency of your calendaring method:

- In addition to calendaring important events such as hearings, filing deadlines and statutes of limitation, always set up “appointments” with the file to perform the work necessary to meet these deadlines.
- Remember to calendar not just what you are supposed to do, but what others are supposed to do. If you request something, always note the due date for the response. In addition, always incorporate a deadline into any request you make.
- Never allow a file to go back into the filing system without a calendar entry for the next time it is to be pulled. When every file always has a “next action date” assigned before it is refilled, you eliminate the need to periodically review all files. The last due date will be the date on which the file is to be destroyed.
- Don't calendar in pencil, but if you must, cross out any necessary changes rather than erase them. You may need this record someday.
- Some offices place all ticklers in a separate card file or calendar. This may be helpful if one person is responsible for following up on staff reminders.
- Have all the calendaring in the office done by one person using one set of procedures. If you are not going to do your own calendaring on a regular basis,

consistently following the procedures, assign the task to a staff person who has time and will do it right.

- Combine calendaring and mail opening functions if possible. One person should open the mail, highlight each item that needs to be entered into the calendar, and initial or otherwise mark the item to show that the necessary entry has been made before it is sent for filing. For electronic systems, this can be accomplished by forwarding email messages with deadlines to the person who is to put them on the calendar.
- All calendaring responsibilities should be specifically made a part of an employee's job description. For example, the job description of the clerk who opens a file should also state that once the file is opened it is to be given a due date and placed into the calendar system.
- Remember that places as well as events sometimes need to be scheduled. It doesn't do you any good to arrange for a deposition if you don't schedule the room to take it. Make sure that conference rooms and other shared office facilities are included in your calendar system.