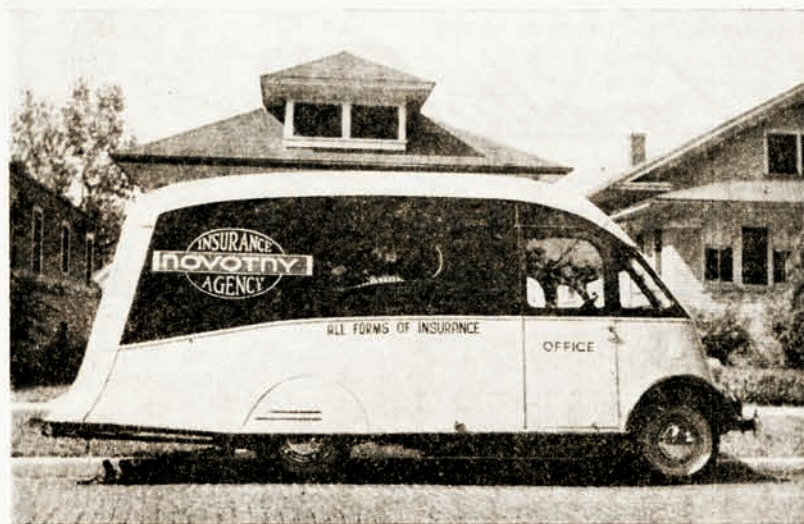


## CENTURIES OF ROUGH NOTES

*Rough Notes magazine, April, 1940*



# OFFICE METHODS CLINIC



PORTABLE—Here is the portable insurance agency of Frank T. Novotny, who gives "curb service" to his clients in Chicago's Forest Park suburb.

## Takes His Office with Him

Maybe the turtle was the original user of a portable house but trailer homes and stores on wheels as well as other types of businesses which have devised ways to take their service to the customer have improved immeasurably on the turtle's idea. Frank F. Novotny, who gets his mail at 1121 Beloit Avenue, Forest Park, Ill., won't be found at that address during business hours. He will be somewhere "in his office" though for he doesn't leave his office when he goes out to see old customers and new prospects—he takes the office with him.

He has a complete insurance agency on wheels, shown above. Forest Park is an immediate suburb of Chicago and Mr. Novotny has been giving "curb service" to his customers for two years. He has found it a convenient way to transact business and, especially, as he works mostly in suburbs. He has his files, desk, reference books, manuals, etc., set up inside the transformed truck. The idea is a great time saver because he always has all of his information within reach. The sides of the portable office carry his name

prominently and serve excellently in making his agency familiar to his community. He handles a nice volume of business.

Here is an idea that ought to "work" elsewhere where conditions are favorable.

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### Handling Renewals

*Editor Office Methods Clinic:*

Q. I notice in a recent issue of ROUGH NOTES in "Office Methods Clinic" under

### Cash for Ideas

WE WILL PAY \$2.00 EACH for ideas accepted for this department. Describe briefly and clearly any idea or method in office procedure—office efficiency and planning, bookkeeping or records, handling of policies, forms, collections, etc. Send, with samples of forms or sheets used if possible, to "Editor Office Methods Clinic," Rough Notes, 222 E. Ohio St., Indianapolis, Ind.

*"The Business Magazine of Insurance"*

"Importance of Renewals" an agent says: "Renewal business is taken from the files forty-five days preceding the first day of the expiring month. A brief transcript is made of the month's business, listing the expirations in consecutive date order, showing company, policy number and name of the insured."

We handle our renewals in a similar manner, yet it seems that dailies get out of the regular file for various reasons—some of the rates are being rechecked, some the loss clerk has out in preparing reports of loss, others are out for attention with various departments of the office. There are two or three occasions when we have almost lost business for the reason that the daily did not show up until maybe thirty to forty-five days later after all renewals had been issued and delivered.

You also state that you make a list of these renewals when you take them out of the files forty-five days in advance. This list will naturally be incomplete if these dailies mentioned are missing, and we would like to ask you if there is some way to double check this chance of error, and how you would suggest that we correct this system in such a way as to get around making these errors as mentioned.—"W. H. C."

A. Although undoubtedly some agencies do file their dailies according to date of expiration, and rely on this file to furnish them with their renewal information, we regard it as a very dangerous practice, as you point out. In our opinion, there should be in every agency an expiration record which is maintained solely for this purpose, and even then there should be a check against it.

When the time comes for pulling renewals, this expiration record is used as the basis and, using it as a guide, the dailies are pulled. In our 1-2-3-4 System, the expiration record requires practically no additional work, being simply a carbon copy of the invoice, filed according to date.—A. J. W.

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### Diligent Office Supervision

The alertness of the office manager and his eagerness to consider and test new ideas play an important part in the accomplishment of any office, according to George P. Wright, assistant office manager of Servel, Inc., Evansville, Ind., reported in "Geyer's Topics."

"The last three years with their renewed business activity also have been responsible for many of the innovations in modern offices," he says. "Systems and methods which had operated satisfactorily broke down under the pressure. Studies had to be made of procedures, systems and forms. These were analyzed by the keen eyes of those interested in accomplishing reduced costs and increased efficiency.

"Office machines came in for their

*(This page from 1940 does not continue.)*