

10 Tips for Paper Management

by Helen Kornblum, MA

The celebrating is long over, the decorations are put away, and each time you enter your office, you're keenly aware that not much has changed in this new year. You're still deluged with paper, the files are bursting with 2005 and now 2006 documents and the piles on your desk and floor are growing. How do you get a handle on this tsunami of information without taking valuable time away from the business? Try a few of these strategies for a gradual fix.

1. Empty the files first

Surveys tell us that 80% of what's filed is never used again, so it's time to clear out the old documents. Start with just a few file folders during down time or at the end of the day when your energy is ebbing. You may find handwritten notes from meetings that are of no use now or memos about projects that never materialized. Do you still need old sales reports? Purge these documents. Pack any archival files into storage boxes. The boxes will take up valuable space somewhere else, but at least they won't be blocking current materials.

2. Identify what you must keep

Most of us keep documents that we believe we'll need "later" because they have legal, tax, or financial consequences. If you don't have enough information about retention guidelines for your business or industry, ask your lawyer or accountant to review the requirements with you. Check with other people in the same industry through your professional association. Check the web for document retention guidelines, too. Your files will shrink dramatically if you let go of unnecessary material.

3. Reconsider your filing needs

Once the files are purged, evaluate the system and identifiers you're using. Do the categories need to be changed? Do you have problems with retrieving documents? How many people use these files besides you, and do they have any problems finding documents? Do you have enough file space? Now is the time to correct the problems you uncover.

4. Chose an alphabetical, subject, or numerical system.

A strict alphabetical approach to filing sounds easy but may be counterintuitive to how you and your colleagues think. Alphabetized subject files such as “Clients,” “Invoices,” and “Vendors,” with sub-files would be better.

You might want to consider the new numerical filing systems such as *Paper Tiger* that create a master database from which you can locate a file immediately. These systems allow you to enter a variety of subject headings for one file, giving you and your staff several ways to find what you’re looking for quickly. Once you understand the concept, you’ll realize that you or an assistant could create an electronic filing system using a basic spreadsheet program such as Excel.

5. Sort with a skeptical eye and a shredder

Practice your sorting skills with the daily mail or your inbox. Train yourself to recycle unwanted material immediately. Then determine the best way to deal with the magazines, brochures, coupons, invoices, correspondence, surveys, and statements in your office. Don’t leave these items languishing in your inbox.

6. Where do your papers want to live?

Papers tend to divide themselves into two filing categories: action or reference. Action files need to be close to your desk, or possibly at the front of your file drawer if the file cabinet is very convenient. These are the files that tell you to do things—make a call, send e-mail, or begin research for a new project. Reference files are for documents that pertain to your business but aren’t used every day. Files relating to clients, vendors, and recent projects belong in your reference files.

7. Deal with each piece of paper

Papers left in piles or scattered around your desk area may turn into office compost if you don’t decide what to do with each one. You don’t have to deal with the substance of each item, but you need to assign it to an active folder so that you know what step you have to take next. The subject may require more research, a call, or perhaps delegation to someone else. Force yourself to make quick decisions about tossing, filing, or delegating.

8. Keep it simple

Some of my clients have insisted on creating color-coded files with fancy tabs. If the visual element is important to you and you have the time, indulge yourself

with supplies and coding that deliver a message without words: green = a financial file. Manila files and standard hanging folders will do for most of us. Use a good labeler for readability, either a portable unit or downloaded computer templates that match standard file labels.

9. Create file indexes

A file index is an overview of your files that can be hung near the files or inserted into a sheet protector and placed at the front of each file drawer. An index is a simple reference and locator system.

10. Coordinate your paper and computer files.

As much as possible, paper and computer files should mirror each other's subject headings. Computer files, including e-mail, need to be purged regularly, too. You can consolidate files by moving e-mails into word documents, but resist the urge to print them out. Do frequent computer back-ups so you'll always have a copy of a useful document. And when it's no longer useful, purge it!

Follow these tips gradually, delegate some the work if you can, or hire help to get you started. Just don't aim for a perfect filing system. It doesn't exist and you don't need it. But you can have a functional system that won't keep any secrets from you when you look for material to start or finish an important job.

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