



## Tips for Organizing Your Paperwork

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Record retention can be confusing and intimidating. Instead of making a wrong decision, most simply keep everything—which creates several problems. The magnitude of paper and documents we deal with on a daily, monthly, and annual basis can be overwhelming, take up valuable space, collect dust, and create storage problems. We find that most people who keep everything with the best of intentions can't find what they need when they need it.

Answering four basic questions will help you make decisions about how to manage the information in your office, whether it's for paper or electronic files.

- What information do you really need to keep?
- In what form do you need to keep it?
- For how long?
- How can you find it when you need it? (That's the really big one!)

To improve your chances of retrieving information, consider these possibilities:

1. **Develop Retention Guidelines.** Clutter is Postponed Decisions®. Paper piles up because someone needs to make a decision about retention. Clients often ask me how long they should keep documents. Following retention guidelines takes the guess work out of how long to keep information.
2. **Continually practice "The Art of Discard".** Research shows that 80% of what we keep, we never use. Don't make today's mail turn into tomorrow's cutter! Ask yourself:
  - Does this require action?
  - Can I identify a specific use?
  - Is it difficult to get again?
  - Is it recent enough to be useful?
  - Are there legal considerations?If the answer to all these questions is "No," ask one final question: "What is the worst possible thing that would happen if I didn't have this piece of paper?" If you can live with your answer, toss - or recycle it! Since security is a big issue today, I've discovered that a shredder is one of the best tools to use to throw things away!
3. **The 4 D's** there are only four decisions you can make about any piece of paper: Delete, Delegate, Do It Now, or Define the Action. Make decisions on paper as it comes in. Put papers that require action into "Action Files". Papers you may never need, but are afraid to throw away, go into Reference Files. As Reference Files become old, they become Archive Files, or can be tossed.

4. **Use some type of filing system:** Electronic – have you thought about going paperless? Taming the Paper Tiger Software. There are others systems like the Freedom Filer, and My Vital File; both use a color coding and pre-set file system.

#### **Improve your protection against identity theft**

- The next time you order personal checks, have them printed with your first initial(s) and last name. If your checks are stolen the thief will not know exactly how you sign your name.
- When writing checks to pay your credit card bill, write only the last four digits of your credit card number on the check.
- Do not sign the back of your credit card. Instead, write “Photo ID required.” Hopefully you will never be the victim of identity theft, however, if you are, remember to file a police report immediately.

#### **Dealing with your desk**

Your desk is the hub of your daily activities. It also becomes a dumping ground as well. If littered with all kinds of paper, mementos and personal items, at times it resembles chaos, not order. Start with the desk top, gather up all paper and sweep it clear of everything.

- Gather – Everything so you deal with it all at once
- Filter – 3 groups
  - Tossing unnecessary
  - Filing
  - Action
- Start - If you don't start you can't finish!

Items a desktop should contain:

- 3 tier file
- In box – incoming items and mail
- Out box – out going items
- File box – place for information needing to be filed
- good functioning stapler
- container for pens, pencils,
- letter-opener
- container for paper clips

Remember, your desk is your work center. The less clutter and knickknacks there, the more space there will be for real work.



I challenge you to **I.G.N.I.T.E.** your personal productivity by implementing what you have just learned. Start by using these steps:

**Intention:** Know your intention, ask why is it important? What are the benefits?

**Get started:** Take action on one strategy you learned within the next 24 hours.

**Commit:** Your Time, Money, & Energy

**Engage the process!:** Motivation, celebration, evaluate what's working or not working to keep moving forward and ask someone to hold you accountable. Your success depends on it.

I would love to partner with you on improving your productivity. Visit my fan page at <http://www.facebook.com/cathysextonproductivity> where I share resources, articles, tips and techniques to help you be more productive.

Contact me for personal help, coaching, training or to join one of our Clutter Buster Program where you get a day of motivation, celebration and accountability support you need for working on your organizing project.

As a productivity coach and strategist, I am passionate about helping individuals discover their personal productivity style so they can accomplish more with less effort. I use my passion and empathetic nature to help people live healthy productive lives! I know the health risks of being a workaholic; I have lived it. My purpose in life is to provide coaching, teaching, and tools to people who are hungry to spend more time with family, enjoy their careers and live a less stressed and carefree life. For more information please visit. [www.cathysexton.com](http://www.cathysexton.com) / [www.TheProductivityExperts.com](http://www.TheProductivityExperts.com) or email [cathy@theproductivityexperts.com](mailto:cathy@theproductivityexperts.com)