Six Tips to Tame Your Paper Tiger

When I've asked clients what causes them to pile instead of file, two primary reasons are consistently given: (1) If they file it away, they're afraid they won't be able to find it when they need it, so they just "set it here for now." (2) They need to do something with it and they don't have time to act on it right then, so they just "set it here for now."   A pile is born!

So how do we conquer the paper-pile-up problem? I offer several tools and suggestions below.

1. Create three labeled stacking trays on your desk to manage paper flow:

INCOMING: This top tray is where the mail goes when it first arrives. It stays here until you have time to sort through it. Once you sort through the pile of incoming mail, it NEVER goes back into this tray. You have three choices as to what to do with incoming mail - File, Act, or Toss (see #3 below)

OUTGOING: This middle tray is where you place outgoing mail -- either US mail or internal mail to others within your office or building.

TO FILE: This bottom tray is where you place items to be filed away for future reference. Be sure you plan time to do your filing at least weekly so this tray does not overflow! (By creating TO FILE in the *bottom* stacking tray, you'll be reminded to file regularly since there's only so much room available for storing paper here!)

2. Set up a tickler file system for anything that requires your attention in the future.

The tickler file system I recommend has an accordion file with tabs 1-31 for each day of the current month, followed by tabs for each month of the year. Behind this accordion file are hanging files with tabs you can tailor to your particular repetitive actions (read, discuss, call, calls expected, data entry, expense reimbursement, etc.) Click here for more information about how to set this up.

One of the greatest benefits of using a tickler file system is that it not only gives you a place to put things, but it also forces you to ask yourself two key questions: (1) *What* is the next action required? (2) *When* am I going to do it?

Sometimes when I see how full my calendar is and I try to imagine when I am going to have time to act on something, it makes me think twice about whether or not it is enough of a priority for me to do. I end up tossing or delegating a number of things when I think about the time that would be required to do it.

3. Trim the F.A.T -- File, Act, or Toss

There are only three things you can do with paper - <u>file</u> it away for future reference, <u>act</u> on it, or <u>toss</u> it.

- **File**: If you choose to file it, the paper goes in the TO FILE (bottom) stacking tray.
- **Act**: If it requires action, you can either act on it immediately or place it in your tickler file to act on at a future time.
- **Toss**: Use your recycling bin frequently. Research shows that 80% of what we file away is never referenced again. So how do we determine what 20% to keep? Ask yourself these questions:
  - Does it require action from me?
  - If it is only an FYI, do I need to keep it now that I have seen it?
  - If I threw it away and discovered I needed it later, could I easily replace it?
  - By the time I *might* need it again, will it be obsolete? Is it recent enough to be useful? Will a more current version arrive on my desk soon?
  - Are there legal reasons for keeping this?
  - Is it clutter? My definition of clutter: Anything you own, possess, or do that does not enhance your life on a regular basis.

4. Create a filing system that works easily and consistently.

If you and others can *file and retrieve* things quickly and easily from your current filing system, great! No need to change anything. However, if your current system is not working for you or others needing to access your files, I suggest that you create one that does.

The number one reason people pile instead of file is a fear of never finding it again once it is filed away. I recommend Kiplinger's Taming the Paper Tiger, a revolutionary new software product that lets you use the power of your computer to solve your problems with filing and managing paper. It comes with a guarantee that you and others can *find anything you file in 5 seconds or less*. For more information about this filing system, visit www.FindAnythingIn5Seconds.com.

To learn more about options for getting assistance setting up your system, visit www.orgcoach.net/paper-tiger-packages

5. Use a good contact management program.

I recommend using a contact management software program, which will store all the important contact information you will need, remind you of important follow-up, manage your calendar, and provide a place for notes about each contact. In addition, you can sort your contacts by various criteria -- type of contact (client, prospect, personal, etc.), area or zip code, city, first name, last name, etc. This provides an alternative to sticky notes, phone messages that are kept for their contact information, business cards stuffed in the desk drawer, or any other types of outdated manual systems.

6. Use a good financial management program.

How about turning that pile of receipts into something more manageable! My tool of choice is QuickBooks or QuickBooks Pro. This program allows business owners to keep a finger on the pulse of your company. It offers the ability to view your financials by accessing transaction reports, overdue invoices, profit and loss statements, expenses listed by date or by category, and much more.   Once your data entry becomes routine, you can develop a few regular reports – snapshots of your business that will allow you to see the details as well as the big picture. With this ability, you have access to valuable information about your fiscal past, present, and the direction your future is headed in.

QuickBooks offers you the ability to send invoices to clients via email, without the client needing the same software program. Your QuickBooks database can also be sent to your accountant as a compressed file via email, or your accountant can access your QuickBooks data remotely (you must set up this access) for such things as tax preparation.

QuickBooks also interfaces with some contact management programs, so you don't have to enter basic data in two different programs when your prospects become clients. You can also automate such things as payment reminders for overdue invoices.

In summary, I recommend you use the following tools:
- Stacking trays
- Tickler file system
- File management program such as The Paper Tiger
- Contact management program
- Financial management program such as QuickBooks/QuickBooks Pro