

Practical Paper Management

4 Easy Steps to Putting Paper In Its Place

By Vicki Norris

The executive who wants to get his environment and professional life under control will invest in several customized paper management systems. The savvy business person values her time, and counts the cost of wasted time searching for missing documents.

Studies have shown that the average executive wastes an hour a day looking for important papers, totaling more than six weeks annually. That represents a loss to that organization equal to approximately 12 percent of that executive's salary.

Indirect detrimental costs (which ultimately cost money or possibly a job) include the following:

- Damaged credibility
- Personal stress
- Interpersonal tension
- Diminished competence
- Lack of confidence
- Stymied productivity

All our resources are gifts to be managed with purpose. This includes our time, our environment, our possessions, and even the documents that record and reflect our life activities. Those individuals who have complete control over their environment, their time and their paper are rare. The flow, capture and retrieval of paper causes more angst and confusion for people than any other area of organizing need.

In fact, all the clients with whom I work need help managing their paper, in varying degrees. Some just need a system to capture their incoming paper. Some lack a filing system, so permanent papers have no destination. We pile because we don't file.

Consider the time you'll spend setting up effective paper management

systems as an investment in your sanity. The costs of finding a misfiled document or recreating a lost document are significantly greater than if the document was promptly and correctly filed.

In the corporate world, I've observed that there are at least four paper management systems my clients seem to need. They include a paper processing system, a current or pending projects system, a refer or delegate system, and a filing system. I can't emphasize enough the importance of *customizing* each system to the roles, thinking patterns, habits and work style of each client.

I extensively interview clients in their unique environments to *discover* their individual needs. Systems that are imposed tend to hinder a person's productivity, and may eventually be abandoned. Systems that are intuitive to the individual are easy for the client to use and maintain.



1 Implement a Paper Processing
1 ♦ system. This system will give you a place to pre-sort your mail and incoming paper. It's generally best if it's categorized by **actionable** items (TO DO, TO READ, TO FILE, TO DECIDE, TO CALL, etc.). However, some people are more topically-oriented, and for them, I set up a **topical** paper processing system built around their specific roles (FINANCIAL, ADMINISTRATIVE, MARKETING, etc.)

This system should be located on the desktop, very close to the user, and can take several forms, depending on the needs, environment, and visual tolerances of the user.

2 Set up a Current or Pending
2 ♦ Projects system. Everyone needs a place to put papers to which they frequently refer. It doesn't make sense to put these "hot" papers into a filing system, where they'll reside among long-term or reference papers.

These papers may include current projects that must go into a holding pattern until a decision is reached. This system should be tailored to the individual, and its papers are distinct from TO DO items, in that there are usually several steps, multiple items, or a recurring need to access the information.

3 Create a Refer or Delegate sys-
3 ♦ tem. Corporate executives usually partner with an employer, peers and subordinates, and have a need to communicate on many levels with these groups. Another system is needed to capture

information and paper related to these people and any collaborative work.

Rather than constantly self-interrupting, the time-sensitive executive should capture e-mails, articles, reviewed documents and other information related to these people or collaborative projects, and put it in one place to later transfer to the person in question.

Refer papers are those that move up the ladder to an employer or laterally to peers. Delegate papers are those that can be handed down — or delegated — to team players. This system is also excellent for capturing meeting information, particularly for recurring staff or departmental meetings.

4 Establish a Permanent
4 ♦ Reference Filing system. None of these systems will last if the papers culled from them have no permanent "home." One of the great mistakes is to neglect this part of paper management, probably because it takes the longest to set up, and requires many decisions. Paper pile-up is a symptom of delayed decisions.

A proper filing system will take into account the executive's roles and will be simple to maintain. It will be created around only the information the executive is responsible for, while other documents will be delegated or outsourced.

From the executive's roles and materials, large categories (between 3-6 is best) will be discovered. Within each category, subcategories are discovered, and individual documents will find a home with-

in a subcategory, within a category.

Filing usually is set up in file jackets and/or hanging files, but it doesn't have to be. It can be housed in binders, on vertical desktop files, in accordion files, in portable containers, or a myriad of other possibilities.

Summary

When you think about it, our paper reflects our personal and professional activity. It documents our accomplishments, projects and goals. When our paper is properly processed, acted upon and stored, we'll begin to reap the benefits of our investment.

Not only will we become better self-managers, but we'll also become more respectful of, and collaborative with co-workers. We'll be able to put our hands on what we want when we want it. We'll think more clearly about our roles and responsibilities. As a result, we'll begin to make choices that honor our priorities.

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