

THE KEYS TO *Managing* paperwork



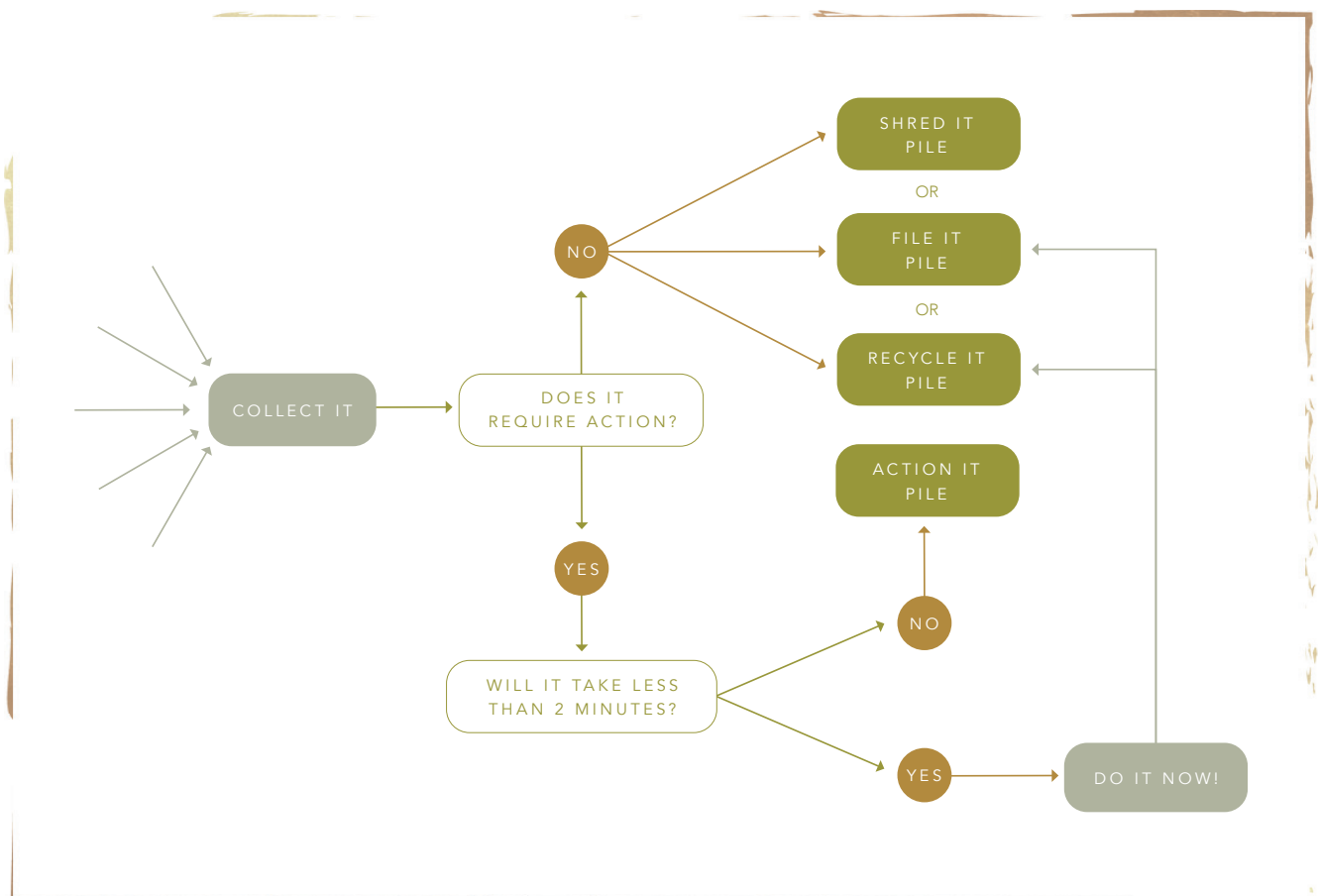
Paperwork not only clutters up your surfaces, it also demands attention and so drains a lot of mental energy. Here is my process for managing and maintaining the paperwork in your home.

With new technology, there is pretty much no reason to have a lot of paperwork these days! So, whenever possible, go paperless. (see the end of this worksheet for my top tips to do this). Having said that, paperwork still arrives from various sources and some of us just like our pen and paper, I know I do! You will need to establish a regular routine to keep it tamed.

ESTABLISH A REGULAR ROUTINE TO CLEAR THE INCOMING PAPER

I strongly suggest you set aside a regular time each week or month to process your paperwork. Call it your 'Paper Date'. Schedule it as if it were a meeting with a work colleague or a session with your personal trainer. Put it in your diary, set yourself a reminder and take a pledge to stick to it.

This diagram gives you a visual overview of the process.



NB This worksheet is not intended as a process for dealing with a backlog of years of paperwork, for this you need to engage in a full declutter process first. If you have my Home Declutter Kit you can use the green and purple cards to do a deep paper purge. Then once you have had a major cull of your surfaces, files, in trays and filing cabinets, you can move on to these suggestions for maintaining a sense of order with your papers.

STAGE ONE: YOUR PAPER DATE

1. COLLECTION

- Go around the house and gather into one place (eg. your desk, kitchen table or intray) every piece of paper that isn't already filed .
- Include letters, receipts, notes, magazines, catalogues and print outs.
- Empty your pockets, wallet or purse, work bag and handbag.
- Don't do anything with the stuff yet, just collect in all up.

2. SET UP FIVE PILES/TRAYS/BOXES: FILE IT, READ IT, RECYCLE IT, ACTION IT, SHRED IT



If you have my Home Declutter Kit, you can use these cards.

3. PROCESS THE PILE: DOES IT REQUIRE ACTION?

- a. If the answer is 'no' put it into one of three piles:
File it, Shred it, Recycle it.
- b. If the answer is 'yes', ask yourself the next question:
Will it take less than 2 minutes?

If it will take less than 2 minutes, do it now, then add to the Recycle it or File it pile.
(This is because it will almost certainly take more than 2 minutes to put it into an action pile, put it away somewhere and then get it out again another time).

If the answer is 'no' add it to the 'Action it' or 'Read it' pile.



When you reach the bottom of the pile, congratulate yourself and take a tea break if you need it.



4. ACTION AND COMPLETION

- Set a timer and tackle the 'Action it' pile. Start by dividing the actions into subcategories:
 - Email replies
 - Phonecalls
 - Web searches
 - Bookings.
- Then work through each sub-category and **do them now**. If you run out of time, leave them for your next Paper Date or set a time to tackle them.
- Tackle the 'File it' pile, or set a time to do it. This blog ([link](#)) looks at how to best deal with the filing and organising of what you choose to keep.
- Set aside time to read the 'Read it' pile. If things are still in the read it pile during your next monthly clear out, maybe it's time to file or bin it!
- Recycle the 'Recycle it' pile. Finally, diary in your next monthly clear out.

If the action it pile is large or you are short of time, you can schedule another time to tackle it.

Stick to this for a few months and you'll feel great and be more productive.

COMPLETE, COMPLETE, COMPLETE

If there is one thing that leads to clutter, it is the act of not completing. Instead of leaving things undone and letting them build up, ask yourself 'What is the next action?' and then take it, eg:

- Put those files of documents away immediately after consulting them.
- Recycle unwanted correspondence right after you open the mail.
- File away the instruction manuals for that new appliance as soon as you have unpacked and learnt how to use it (or better still, download a PDF version and recycle the paper one).

Now, move on to Stage Two to reduce the amount of incoming paper, which will make your regular Paper Date a little easier every time.



STAGE TWO: REDUCE THE AMOUNT OF PAPER COMING IN (OPTIONAL)

One of the most effective ways to deal with the build-up of paper is to reduce the incoming flow. This will be great for your home, your state of mind and the environment. Here are three key things you can do.

GO 'PAPER FREE' AS FAR AS YOU CAN.

Most banks, insurers, utilities and public authorities have the option to go paper free. It shouldn't take long to set up and you'll be more than compensated by the time you save opening and filing paperwork. Usually, you can opt in and out of different types of mail. So, for example, you could decide to still get statements, but opt out of the terms and conditions and other letters.

BLOCK JUNK MAIL TO DECLUTTER YOUR DOORMAT AND INTRAY

- Sign up to the **Mailing Preference Scheme** and stop a lot of addressed junk mail
- Join **Royal Mails Opt-out Scheme** to block lots of the unaddressed mail they deliver
- Put a sticker on your letterbox and it will stop the takeaway menus and leaflets.

STOP OTHER PEOPLE'S MAIL

People may redirect important mail when they move, but they rarely contact everyone and definitely not any junk mailing lists. The result, you'll continue to get the previous owner's junk as well as your own! Write 'Not at this address - return to sender' on any mail to previous residents or misaddressed letters and pop them in the post box. It's a little extra work, but in the long run much easier than having to pick up, 'tut' and recycle them every time they arrive.