

Organize and Manage Your Way Out of Paper Overwhelm in 7 Manageable Steps



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Organize and Manage Your Way Out of Paper Overwhelm in 7 Manageable Steps

Are you swimming in paper? Drowning?

Have you tried to set up a filing system only to find papers still difficult to find when you need them?

You may be wondering, how do I efficiently store what I need?

Are your filing cabinets so full, you can't stuff another paper in there?

Or are you thinking, what filing cabinet?

So much for going paperless! Without a doubt, I find the #1 organizing problem is paper. Like you, I have a lot of paper too. I am sure that you also receive paper in the mail 6 days a week, paper left on our doorstep, packaging paper, receipts, notes, computer print outs, and if you have kids; reminders, permissions slips, work sheets, and art projects. It can pile up very quickly and soon be out of control.

Over the years, at home, at the office, and in the classroom, I've spent a lot of hours developing and testing the most practical and efficient ways of organizing paper. I implement these for my clients and I would like to share them with you.

If you want to be in control of your paper, don't wait! Use this e-book to guide you through organizing the paper in your home. The paper organization process is broken down into concise steps, so it takes the guesswork out of what to do next and how to do it.

Start today! Take steps now to start organizing your paper. You will feel good to get it DONE.

To your organized and beautiful home,

Grace

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Let's get started!

Generally try to do the steps in order one at a time. If a step doesn't apply to your situation, just skip it. But, word of warning, don't skip the planning steps 1 and 2. These will save you a lot of time and energy during the organizing process. Schedule time to organize into your planner. You can fit each step into your schedule and do one step, several steps, or stretch one step over several days. Organizing takes time and focus. If you need help, don't be afraid to ask for it.

Just keep moving forward one step at a time. It **really** will be worth the effort.

Step 1: Set up a Temporary Paper-Processing Center

Do you have stacks of papers to organize? Depending on the amount of paper, it will most likely take more than one day to sort, organize, and put away. That is why it is best to set up a temporary paper-processing center. A large table makes the best place to gather and sort paper. A table in an area that is not often used, like formal dining room, works even better. I like to sort standing up because you can move around more quickly, but a tall stool can work well also.

Inbox (any color/material, large/heavy duty enough to hold a magazine)

3 paper grocery bags or boxes labeled RECYCLE, SHRED, TRASH

scissors, stapler, staple puller, large and small paper clips, large and small binder clips, rubber bands, sticky notes, Sharpie, and a letter opener if you use one

(Speed tip: Put the preceding items in a basket or tray so they will be there when you need them.)

I recommend using paper grocery bags because they are easier to manage. They don't get as heavy as boxes, they stand up and open, you can write on them, and their recyclable so you don't need to empty them. If you want to, use the reusable shopping bags, you can attach a 3x5 card with a small binder clip to label it. Added bonus, they are heavy duty enough to easily carry to the recycle bin when full. Paper can weigh quite a bit.

Step 2: Gather all of your loose and unprocessed Paper

All means everything from everywhere! Coffee table, kitchen counter, purse, car, closets, floors and stack in one area of your paper-processing center. The stacks may look overwhelming but in the long run it is faster to sort it all at once.

Caution: drawers and bookshelves are notorious for concealing paper.

Step 3: Quickly reduce those Paper piles

Read through step 3 and step 4 *before* you begin to sort through the stacks because it is quicker and easier to do both these steps at the same time.

Open **everything!**

As you are working through the piles recycle things that are no longer relevant, outdated or expired. Magazines, catalogs, brochures, newspapers, business cards, and coupons often fall into this category. You can immediately eliminate about 1/3 to 1/2 or more of your paper by tossing outer envelopes, unneeded inserts, unwanted solicitations, and junk mail into the recycle or shred.

Add party invitations, doctor and dentist appointment reminder cards etc. to your planner now, so you can recycle the paper. Put newer business cards and contact information in an envelope so that you can schedule time in your planner to add to your data base or address book. Always shred information that has your address, account numbers, social security numbers, and other personal information you wouldn't want to share with others before putting in the recycle. If you don't have a shredder, shredding companies can shred in volume for a reasonable cost.

Ask yourself:

Are there subscriptions or services I no longer want?

Cancel them now or make a note in your planner not to renew.

What can easily be found again on-line so I don't have to store it?

Directions, magazine and news articles, and computer print outs often fall into this category.

Is it practical for me to get my statements and magazines on-line?

If it is, schedule a time in your planner to sign up for the on-line version.

Are you receiving things for people that no longer live at your address?

Write "Does not live here, return to sender" in big bold letters on the envelope and put back in the mail box.

Do I really need to keep it?

Everyone has a few of these. If it is financial or tax related, call your CPA, financial planner, or Tax professional and ask.

Beware of saving too much for re-use. I know these are not all paper items, but I just had to add this because I see these clutter makers over and over again.

Those beautiful shopping bags from the mall. (Keeping 5 makes sense, 50 does not.)

Plastic and paper grocery bags

Plastic and glass storage containers from lunch meat, whipped topping, jelly, peanut butter, milk, pies, etc.

Broken storage containers

Cutting up old paper for notepaper

Saving old cards to use as gift tags

But, you say, I can use these for . . . I know it really sounds like your being “green”, but it is just **too easy** to accumulate a landfill size collection in your home and garage. Recycle please, new additions to these collections will keep coming in. They really will!

Step 4: Sort into Categories

Sort papers into stacks by like kind.

For example: Sort bank statements by account number, sort reference material by subject such as cooking, fitness, gardening etc. If you have a stack of things that are related but your not sure yet what to call that category, just write on a sticky note with big bold letters, briefly what is in the stack so you can identify it quickly as you find more things to add. Current bills and things that need attention now should be put into your in-box.

(Speed tip: At this point, don't worry about separating duplicates or putting statements in date order now. Once you have all of a particular category together and are ready to file, you can arrange them by date all at one time.)

Some other categories you may have:

Automobile Appliances

Banking Bills Business

Crafts

Deposits Dental

Electronics

Gardening Gift Cards

Health Holiday

Insurance-Auto, Boat, Rental, Home Owners, Life etc. Investments

Kids

Magazines Memberships Memorabilia Mortgage

Pest Control Pets

Real estate Recipes Receipts Remodel/Renovation Retirement

Taxes-by year

Use a large plastic container with lid for storing random paper **memorabilia** like concert tickets, kid's art projects, cards etc. I would get a separate one for each person in your household. Be sure to clearly label all storage containers, even the clear ones. Because containers of memorabilia usually contain an assortment of non-paper items also, label for example "Memorabilia" or "Mary's Memorabilia".

Step 5: Decide how to store the paper you must or want to keep

Even though you hear a lot about going completely paperless and I believe we are heading in that direction, we just aren't there yet and it would probably take too much of your valuable time and energy to electronically store all the paper you already have that you need to keep.

Choose your paper storage products based on your unique needs. So be realistic; think about how much you are storing, where you are storing it, how and when you will need to access it. If you can't get into it easily, you will not use it.

I have found the following products to be the most useful for my clients. All of these can be purchased from an office supply store. You may even have these already.

File drawer

File drawers work better than open crates or file boxes that open from the top because you can open them even when they are stacked or things are on top of them. Your file drawer can be part of your desk or a separate cabinet with the drawers stacked either vertically or horizontally. They come in a variety of colors and styles, including classic grey metal. Look for drawers that open and close smoothly. Struggling to open or close a drawer is inconvenient and time consuming. If you need

portability, single plastic file drawers are easy to move around, can be stacked in a variety of configurations, can be locked, and you can add more if your storage needs increase.

File drawers will hold either standard or legal size file folders. Some drawers can be converted to use either standard or legal, most can't. Standard holds 8 ½" X 11" paper and is suitable for most filing. Legal size is 11" x 14". If you have a lot of real estate you will need the legal size for the closing statements. If you have the space it works well to have one file set up for standard size folders and one for legal. The two sizes will not fit in the same drawer together.

Hanging file folders

Remember, it's all about quick and easy access. I recommend individual hanging folders rather than flat folders because they don't fall over. Hanging folders also come in legal and standard sizes. You can also find ones with wider bottoms that hold a thicker stack of paper if you need them. Any color or design that you like will work.

Labeling your hanging folders

I recommend clear tabs and white inserts. The colors are pretty, but clear tabs are much easier to read through and give your file system a more uniform organized look. You can either write on your tab inserts with a fine or medium point Sharpie, use a label maker, or computer generated labels. If you want colored labels, use colored paper for the inserts.

Step 6: Organize Your Sorted Stacks into your File Drawer

I like to organize by category rather than alphabetically. This cuts down on the possibilities of where something may be filed, making it easier to find things. Look at the sampling of main categories. Create labels for those you know you have like Banking, Investments, IRA's, Retirement, Recipes, Vehicles, Insurance, etc.

(Speed tip: Putting labels on the front of the folder keeps them from getting hidden by the paper in the folder.)

For example: For the main category **Banking**, put a label on the left front side of the hanging folder. Make a label for each of your sub categories such as: **B of A #123, Citibank #123, Wells Fargo Acct. #123**, etc. In addition to the account number, you can add type of account such as checking, savings, money-market, etc. Whatever helps you identify it quickly. Place those labels on the right front of their hanging folder. Put statements in order into the appropriate folder. Shred what you don't need such as inserts, duplicates. If you are unsure what financial papers to keep, call a trusted accountant, or tax preparer.

If you do not have much paper for a sub category but want to keep it separated, use a flat folder for each sub category and place in the main category hanging folder.

(Speed tip: If you have a question about something that doesn't have an immediate action, put a bright colored sticky on the paper, make a note to ask in your calendar, but file in the appropriate folder so that it won't get misplaced, and you will be able to find it quickly.)

Step 7: Develop a simple, efficient routine for dealing with incoming paper

After organizing your paper, you want to develop an efficient routine for keeping paper flowing smoothly through your home and life. Paper flow breaks down into 4 parts: incoming, processing, storing, and outgoing. In order to be effective your routine needs to address each of these parts. Your goal is to have a simple routine that includes a place for everything so there is no question where to put it or where to find it.

Incoming:

Designate a specific spot for your inbox. Make it accessible and convenient so you'll use it. Throughout the day, resist the temptation to put paper "here for now". Otherwise, you will need to move it again, wasting your time. Put all incoming mail, paper, and "I don't know's" into your inbox. Try to immediately recycle and shred what you do not want or need. If there are others in your household, sort their mail directly into their inbox(s).

Example: In my office, I have my inbox on the far right side of my desk, a recycling bag underneath the far right side of my desk, papers to be shredded go on top of the shredder to my left, and magazines and catalogs go into a magazine rack upstairs. I also have a folder in the car for coupons and gift cards.

Processing:

Sort from your in-box and/or as mail comes in.

Separate mail for others.

RSVP for events.

Write important information, such as Doctor appointments, phone numbers and directions, immediately in your planner, calendar, or tickler file.

Schedule time on your calendar to do the things you need to do. For example; you could put bills to pay in a "To Pay" folder and schedule time to pay them.

File papers you are going to keep

Again, recycle and shred what you don't need.

Storing:

Yes, there are going to be things you want or need to keep for a variety of reasons and that's OK, so file them in your file system. Resist the temptation to keep too much.

Example: You don't need to keep printouts from the internet, if they can easily and quickly be found again.

Choose a designated container, such as a sturdy basket, in a designated place, for magazines, and catalogs.

Outgoing:

To keep things from piling up, it might be helpful to pick a specific time and/or day(s) and actually schedule it in your planner.

Some paper, like junk mail, comes in, isn't stored, and moves out very quickly so make it a habit to immediately purge what you don't want or need.

Go through your inbox regularly.

When you add a new magazine or catalog to the basket, recycle the out dated one. Don't forget to go through your files at least once a year and eliminate the papers you no longer need to keep. Tax time is a good time to remember to do this. Or, when you put new papers in the file, take a quick look to see if there is anything to go out.

Need Step-by-Step Solutions to eliminate disorganized and cluttered areas in your home?

Why wait to get organized.

I would love to get you started with a complimentary "Get Acquainted" phone consultation. We'll talk for about 15-30 minutes and really zero in on your needs, and how I can help you.

I have lots of ideas to get you into action.

Call me now 408-202-4272 to schedule an appointment
or email me grace@checkitoffyourlistnow.com

I will get back to you within 48 hours to schedule an appointment.