Clutter is Postponed Decisions®
by Barbara Hemphill
www.ProductiveEnvironment.com

Do you have papers stacked on your desk? Do you start the day with the best of intentions about "getting organized" and then shuffle the papers from one side of your desk to the other? If so, you're not alone! Research shows the average worker spends 150 hours per year looking for misplaced information. All those papers stacked up on your desk require decisions, and it's easier to shuffle than decide. In addition to the papers, you have to decide about computer files, email and voice mail messages. But there's good news! There are really only three decisions you can make about any piece of information. To make it easy to remember, think **F.A.T**: **F**ile, **A**ct or **T**oss.

Over the years, I've developed a tool I call the "Information Management Flowchart." Sounds heavy-duty, but it's quite straightforward - and you can use it to make decisions about your information from your in-basket to the trash can or recycling bin.

The key word here is flow. I've found that the problem isn't that too much information flows into an office - it's that too little flows out. It gets stuck - and so do we! The difference between paper shuffling and paper management is decision making.

It's no accident that I list "toss it" as your first option in managing information. Research shows that 80% of what we keep, we never use! I'm convinced that our ability to achieve goals is directly related to the wastebasket, whether it's the circular file next to your desk or the trash can icon on your computer. I've no doubt that your stress level will decrease as the amount of stuff in your wastebasket increases.

19

The Art of Wastebasketry™
It's not practical - or perhaps even possible - to keep everything that arrives in your office. When you run out of space or can't find what you need on your desk or in your computer, life becomes unbearable. Remember the PaperTiger Principle: "If you don't know you have it, or you can't find it, it is of no value to you!"

Determining whether you want to keep each piece of paper at all is made easy by asking yourself these six questions:

• *Does this require any action on my part?*
Just because you receive information — even if it's from your boss — doesn't mean you need to keep it! (She may just be cleaning off her desk!) If it doesn't require action, file it or toss it right away! If it's just an FYI, read it and toss.

• *Does this exist elsewhere?*
Is it in the library? Do you know an expert on the subject who'd be certain to have more complete information if you really needed it? Is the original in a file elsewhere? Do you also have a book or manual on the same subject? Is it necessary to keep a hard copy if it exists in the computer?

• *Is this information recent enough to be useful?*
Today, information becomes outdated very quickly. Would you want a customer to decide whether or not to choose your services based on a 3-year-old brochure? The information in a 6-month-old magazine article about computer software has undoubtedly been superseded, as has a downloaded product review from an on-line service. In many cases, it is more appropriate to keep track of the source of the information, so you can get the latest version, rather than keeping the information itself.

• *Can I identify specific circumstances when I'd use this information?*
Usually, "just in case" is not good enough! Files labeled 'miscellaneous' are of little value, because

there's nothing to trigger you to look there. If you can't identify how you'd use the information, at least well enough that you can file it for future reference, it's unlikely that you'd remember you have it, let alone be able to find it later.

• *Are there any tax or legal implications?*
Here's where "just in case" works. Unfortunately, we're frequently required to resurrect paper that we'd much rather have forgotten. It's also wise to remember that sometimes, having outdated information in your files can create unnecessary problems. A client of mine was sued, and the company's files were subpoenaed. In one of the files was a copy of a contract which had never been executed. The prosecuting attorney was able to use that document to prove that my client's intent was wrongful, and they lost the suit. If the files had been properly cleaned, I don't believe that would have happened.

If you answer "No" to all the above questions, but are still not comfortable throwing something away, ask one last question:

• *What is the worst possible thing that could happen if I did not have this information?*
This is key. If you're willing to live with the results, toss it. If not, keep it.

Your Retention Philosophy
How you answer this last question is significant in determining your "Retention Philosophy." Two people might answer this same question quite differently. One might say: "The worst possible thing that could happen is that someone would get upset with me." The other might respond, "I'll risk it!" and throw away the item, while the other would say, "It's not worth the risk!" - and keep it! Neither answer is "right" or "wrong," they simply reflect different tolerances for risk.

I was originally motivated to write my first book, Taming the Paper Tiger, in an effort to answer the question, "How long do I keep ...?"

When I began organizing businesses, I discovered that "document retention" is a far bigger issue at the office than at home. Frequently, the reason file cabinets overflow and computer disks seem to multiply is that no one has made decisions about what should and should not be kept - and for how long.

People often refuse to make these decisions because they're certain there's one "right" answer; as soon as they discover what it is, they'll begin to purge. Even if you consult five authorities about records retention guidelines, you may get several different answers. You're the only person who can make the final decision.

Letting Go
My experience is that the more organized we get, the more willing we are to let go. But in the case of business papers, it's important to determine what we must keep to protect ourselves and our organization.

First, check with your organization to see what retention guidelines already exist. Most companies have them, but don't do a good job of letting employees know they exist. In theory the rules should be passed on from employee to employee, but in reality, that rarely happens and everyone has to figure out the rules for themselves.

It's just as bad to have them when they're not "user-friendly." Often you've got to create your own retention guidelines. If you're new to a position, it'll take a year before you can make that determination, so put the old stuff in an out-of-the-way place until you can decide. Then, reflect on your actual experience with the records you are keeping:
  • How far do you actually go back and use them?
  • What would happen if you didn't have them?
  • Are there legal consequences?

Determine a good place to put retention guidelines. A clearly labeled notebook - or a section of a procedures manual, if there is one - would work. My favorite place to put my retention guidelines is on my File Index itself.

Your "In-Box"

For many, the in-box for paper or electronic stuff is a holding pen for postponed decisions. You shuffle through it and don't know what to do with every item, or don't feel like figuring it out. So those items go back in the box and you shuffle them for a few more weeks, along with the new material that arrives.

The real purpose of the in-box is to physically separate items you haven't looked at from those you have. Let's say you sit down at your desk to look at today's mail, which you put in the center of your desk. You get part way through, and the phone rings, or someone stops by your office, and you need to find a file to get information. Another interruption follows. Before you know it, your desk is covered with papers you have looked at, and papers you haven't. Now you've got to sort through them all over again, which simply wastes time. Instead of putting the papers in the middle of your desk, leave them in the In-box - until you're prepared to do something with each individual piece that you remove.

"Handle a Piece of Paper Only Once?"

You've probably heard, "Handle a piece of paper only once!" Many people try that and fail, so they give up altogether. Let's adapt that old adage a little -"Handle a piece of paper only once - after you've taken it out of your 'In-box'." Use the In-box to hold items you haven't looked at yet. Once you've removed something from the In-box, remember FAT - file, act, or toss, then handle it only once to make one of these three decisions. You can then put it in a specific place, such as a "To File" box or an "Action File" so when it's time to take appropriate action, you'll know exactly where to look for that item.

When it comes to e-mail, take immediate action - especially deleting - whenever possible. If you're more comfortable managing paper, print out e-mail messages that require action, and handle them as you would any piece of paper.

You must learn to believe that your time is too valuable to continually shuffle papers and files. Do your best to keep what you need and get good at filling your garbage can or recycling bin. Your conscience and work flow will be greatly eased!