

# Ask SCORE

## GET AHEAD OF YOUR PERSONAL PAPER CHASE

Forget everything you've read about the "paperless" office. Though our computers, PDAs, and smart phones have digitized many aspects of daily life, paper is still very much with us.

That's not necessarily a bad thing for a small business owner. After all, clutter is usually a sign of activity, whether it's new projects, financial reports, receipts from sales and expenses, or reminders of upcoming appointments. What's more, many entrepreneurs love their cluttered desks and offices because they know exactly where to find something they need—often to the bemusement of their tidier colleagues and employees.

But when you become too accustomed to clutter, you may not realize how cumbersome it becomes, or how it compromises your productivity. Minutes spent looking for a particular item can add up, especially if you're pressed for time. You are also more likely to be distracted during your searches, derailing the reason you dove into the pile in the first place.

Organizing Coach Carol Halsey has developed a five-step approach called DRAFT— Discard, Refer, Act, File, and Table—that can help small business owners organize for efficiency:

**Discard:** If it's something you'll never retrieve again, trash it, don't file it. Your files should be a "resource holding tank," not a dead storage place.

**Refer:** If someone else needs the information or can handle it for you, pass it along.

**Act:** If it requires action by you, do it now. It's inefficient to delay and handle the paper a second or third time.

**File:** If it's important and you will truly need it later, file it in a proper filing system that allows you to find things quickly.

**Table:** If it's something you'll need in

the near future (but not today), place it in a simple follow-up system for easy, quick access.

Planning is also essential to staying organized. Professional organizer and productivity expert Julie Morgenstern recommends selecting a single consistent planning tool, whether it's digital or on paper.

"When all your ideas are in one place you can prioritize everything in context, not in pieces," she says. The planner should have your to-do list, phone calls and key documents "That boosts your confidence, particularly in meetings, because you know where everything is, and where to find it," Morgenstern adds.

Another organization must-have is a filing system for critical information such as contacts, pitch letters, proposals and marketing content. "This kind of system is critical to your speed of execution," Morganstern says. "If you can't find it, you will get frustrated and start to procrastinate."

You can also manage business contacts better with a client information system. It should contain details about your client, his or her assistant's name, family information, past contacts and projects for them, etc.

For more guidance on how to operate an efficient office, connect with SCORE, a nonprofit organization which offers free and confidential counseling to members in the small business community. The nearest SCORE office is in Pottstown. Request free counseling or check out the workshop schedule by going to [www.pottstownscore.org](http://www.pottstownscore.org).

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