Sorting out your study

Part 2: The stuff in the room

A37   Articles series: Leadership

These two articles (A36 and A37) are designed primarily for Ministers who work from home. They will also apply to other church staff who work from a home base such as youth workers, pastoral staff and musicians.

They have in mind anyone who finds administration somewhat perplexing, and especially those whose studies look as though they have just been targeted by a group of amateur burglars looking for the family silver.

But for a growing number of church staff in larger churches, this space may no longer be in the home but centralised on the church site. This will also be true for most Administrators working out of 'the church office' and for interns. So everything here will apply too to 'sorting out your office' whether at church or in a Christian mission agency.

This first article tackled the room itself and the desk within it. This second one goes on to look at the handling of paper in various forms within that room. But one makes little sense without the other. The focus here is more on physical materials, although I will make reference to IT files and emails throughout. My training sessions for clergy on paper-handling follow the kind of material I cover here.

You can access the first article on the space in the room at A36 *here*.

I focus on two key ideas to help you succeed in paper-handling: Sorting and Filing. You will find an earlier version of some of these ideas in Article A1, *Pass or file*, on this website.

A 'To Do' diary

This article relies on a diary system that combines engagements with work planned to be done on given dates, both major tasks and quick reminders. This allows you to sort papers out of sight because you have an automatic system to action them at the right time. Such a system is described on this website in outline at Training Notes TN23, *How to do 'To Do' lists,* and in more detail in Article A51, *The 'To Do Diary' guide.*

D: **Sort yourself out**

The key to working efficiently when paper and similar substances are arriving at your desk at an alarming rate or, more likely for Ministers, have built up while you have been away, is to make SORTING the first task. I want to highlight this vital word.

There are some medical problems that are OK to talk about in polite company and there are others about which we prefer to be more coy. Those who suffer from 'piles' don't normally bring the subject up at dinner parties.

But there is an equally painful illness. Its symptoms are as follows.

You get back to your desk to find a pile of stuff on it: papers, notes, files, catalogues, magazines, and so on. You pick up the first one to see what it is, are not quite sure what to do about it, and put it back on the desk to one side. Then the second, which you think about then put back on top of the first. And the third, fourth and fifth. You have now looked at everything – but done nothing with anything!

My disease is called 'reverse piles' because that is what you have created on your desk. The one difference from five minutes ago is that the pile is now there in reverse order.

The next day you come to your reverse pile and look at each one in turn, putting them back down on the desk again. So you end up with …. yes, a reversed reverse pile and so the one you started off with!

Problem solved, but you have got nowhere. Be honest – most of us do that at times.

So my points about sorting are designed to prevent the disease of reverse piles. This article is preventative medicine! Here are seven doses to take.

1: **See 'sorting' as a genuine and vital activity**

Key point: 'sorting' is vital if you want to be in control of your desk, rather than letting it control you.

You are going to look quite briefly at each item and place it somewhere – and that somewhere is NOT back on the desk. Why? Because, from Part 1, a desk is a work-surface not a convenient storage area. In fact the pile waiting for you should be in an in-tray (or an email inbox) and not just dumped on the desk.

Sorting is all about checking each item and placing it somewhere where it belongs. Then you

are in control. Your morale will go up and you will work more effectively. Action follows later.

For your emails, you are going to skim each one quickly and decide in a similar way. There are a number of options here. You can leave them in the inbox if they need dealing with, but a better idea might be to create a sub-folder of the inbox for Action.

So next time you approach your desk or computer or digital device your first task is to sort what is waiting for you.

2: **Action only stuff taking no more than two minutes**

'Sort' does not mean 'take action' – except in one particular case. If you find stuff that you can deal with quickly (two minutes maximum feels about right; other writers say the same), do it then.

If you are sorting ten items and five of them take an average of one minute each to action, you've only added five minutes to your sort time. And you've got rid of some stuff.

Here are some examples.

- An email that thanks you for your answer but says little more. Read it, in your mind thank the person for having the courtesy to respond, delete the email: 15 seconds.

- A printed item that is not relevant. You skim it and place it for recycling or shredding immediately: 15 seconds.

- An email with some simple information that you need to keep but no other action is required. Read it, note it, ponder your action for five seconds, file the email: one minute.

- An invitation for an occasion that you know you cannot manage and it has RSVP. You respond on the website or by email and then discard the item: two minutes.

- A voicemail from someone with a question: can you manage a particular date for a meeting? You phone back immediately, leave a voicemail if necessary, give the answer. Put the date in your diary. Delete the voicemail: two minutes.

So, although you are sorting, you should action the quick items – but resist the temptation to action anything else. Now is not the time for that.

3: **Be disciplined – refuse to be distracted**

Resist fiercely the temptation to action anything that cannot be completed in two minutes.

So, a monthly magazine arrives. The correct action here is to place it in the 'magazines to read' tray and to look out the previous issue and recycle that, keeping any articles that you have clearly marked on the cover.

A poorly disciplined person starts to dip into the magazine and soon finds an interesting article or advertisements to check. Ten minutes later – they have used up time better spent on different activities.

The point is that if you have 15 minutes to sort what has come in while you have been out (post and messages, voicemails, emails), your job is to end up with everything where it ought to be and all the two minute items done. There is no time to play lazy games.

Of course external distractions may make you push the pause button. The phone may ring, a caller may drop in. But you are sorting for these 15 minutes – it is a genuine activity.

4: **Discard/delete much more than you think you should**

Most of us keep far too much stuff. Most of us can therefore delete or shred/recycle far more than we do at present. Let's say you decide to double the amount of stuff you get rid of immediately. The advantages are

- you have much less to file so you reduce filing space;
- you can find things much more easily because there is less of it;
- you live a simpler, less cluttered life.

The snag is that

- you may discard something you then need.

Most of us live in fear of this last point. But the reality is that things are in such a mess that we never find it anyway, even if we have it! I recommend in my training sessions on this that everyone should find from time to time that they have got rid of something they now need. That's

right, it should happen! If it never does, you are not throwing enough away.

If you do find you no longer have something you need, the chances are that those you work with or those who sent it will not be pursuing this principle and will still have a copy (if they can find it). Just ask.

Some people delete every email. I would not go that far but I believe it is a better option than keeping thousands which you do not really need. Go on – live with a spot of risk in your life.

Note: I cannot be held legally responsible for any action you take as a result of reading this article. If you really decide to shred your birth certificate or delete your digital photographic folder without informing your nearest and dearest, that's your decision!

5: **Sort by next action not by the item itself**

This sounds straightforward but I am convinced most people don't do it. Take this email, magazine, catalogue, invitation, technical paper. Your first thought, if it is not a two minute item is, what do I need to do with it next? The answer might be:

- think about it carefully;
- reply to it;
- consult a colleague;
- research an answer;
- read it at leisure;
- take it to a meeting.

Take some simple examples. Here is an invitation to an event and you are in your study or church office. Your family or colleagues are invited too, or if not you need to check you can be away that day.

So next action may be to check at the staff meeting, or with the family calendar or discuss with your spouse/children if applicable. So it needs to go somewhere where you will take it to the meeting or home. That is the next action. Replying comes later.

Here is an online catalogue you are looking at so now you can choose the item. But the next action may be to talk to the Treasurer.

Here is a tricky request where you need time to think about the implications of your decision. It may be that this needs to go with your prayer material because you would like to ponder it tomorrow morning in your prayer time. If you leave it elsewhere you may not get round to praying about it.

6: **Ensure each item belongs somewhere**

When you sort, everything needs to belong somewhere (but not on the desk!). Without this concept people go back to reverse piling. Avoid 'sundry' piles and 'misc' folders too.

In hard copy, this means you have 'files', both temporary and permanent. They may be the sort that go in a filing cabinet but they may equally be ring binders, box files, plastic wallets on a tray or whatever. In the digital world you have folders, plenty of them but arranged in a logical way.

Sorting means picking up the next item or selecting the next email, skimming it so you have a good idea of the content, deciding what the next action is for this, and then placing it in a file or folder for that action.

I will deal with all this in more detail below when I tackle filing itself. But for now the point is that you cannot sort unless you have places to sort to. So that means you need to develop a series of such places and, I recommend, a set of plastic wallets to go there.

That may well mean going out and buying some simple trays, box files, ring binders, plastic wallets or other items where things may go. In your emails it means starting a simple folder system. Read Training Notes TN53, *A simple email filing system*, for ideas here.

7: **Don't be frightened if that somewhere is out of sight**

This is the scary bit. Most people see something they have to deal with but they cannot deal with it now. Perhaps they don't have time, perhaps they need someone else's input. But they must not forget it, so they put it … back down on the desk so or leave it in the inbox so it is visible.

The trouble with this system is that once you have done it with the next few items too it is no longer visible – and you do not have a desk. Just a mess. Once you get it into your head that the

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> **KEY PRINCIPLE**
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> *Your desk is a work-surface and not a storage area.*

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desk is for working at and not a storage area, you cannot place it back there. It has to go somewhere. And my point is that that somewhere does not have to be immediately visible.

This system works provided you have a different method from visibility for bringing the item back into view once you need to work on it. You can do this with a diary system (paper or digital – see page 1) or a 'holding' filing system.

The diary system means that you make a note in your diary for, say, next Tuesday that you are to work on this item then, because you are too busy now and Tuesday is fine for any deadlines. Then you file the item where it belongs permanently: in a filing cabinet, in a ring binder, in a box file or wherever. Next Tuesday your diary tells you to work on that item and you know where it is. Your desk has remained clear throughout this period. See Training Notes TN23, for how this diary idea can work in practice.

The filing system means that you place it in a holding file (I'll deal with this in Part E below) which is a file of papers you check regularly, either on a daily basis or because it is a current project and you'll be working on it this week. There is no need for a diary reminder here.

But in all this it belongs somewhere not on your desk and you have a system of bringing it back into view when it needs to be there. It sounds dangerous, but it's actually a lot safer than placing it on your desk with everything else and getting lost.

So there are my seven doses to avoid the pain of 'reverse piles'. Action of course has to follow – but at least you are now in control. And, yes, I know that in the real world life is not quite as simple as this and things all happen at once and emergencies arise. But get these ideas into your mind and you have a firm foundation.

E: **File to find**

Now we turn from 'sorting' to 'filing' – but I consider this to be a much bigger idea than what you may currently have in mind. I'll focus more on paper here, but the same principles apply to digital files and to emails.

The problem with filing is that most people think it is a boring task involving putting A4 sheets of paper into a metal filing cabinet. Let me introduce you to a different and life-giving world. After all, FILE anagrams to LIFE rather neatly. Here are eight instructions to give this subject a much-needed make-over. By the way, always file continuously – never have a 'To file' pile.

1: **Think Find not File**

The first thing most people get wrong is what filing is all about: they think it is putting away. But anyone can chuck 1,472 pieces of Lego into a plastic box and close the cupboard door. It needs no skill to shove a handful of papers into a cabinet and close the drawer.

No, the key to filing is finding – you only need to change two letters in the word 'file' and you are on to a winner! The whole point is getting to one particular piece of Lego once it is away, or putting your hands on one specific sheet of paper in that pile. So you are aiming to place whatever it is in such a location that you will know where it is and be able to get it out again – fast.

The key to successful filing is to think FIND – that will determine how to file. In the business world they've got this message and talk about 'retrieval systems', but why use a long word when a short one will do?

So why not rename that metal object a Finding Cabinet? But there's a lot more to come yet.

2: **File everywhere**

Filing is thought to be dull because it has an image of boring admin. You used to dump such a routine on a 'filing clerk'. But just think a bit more widely for a moment.

You file all kinds of things in each room of your house: you are putting stuff away 'where it belongs' so that you can find it and use it again. So if you are a gardener you file in your garage or shed: gardening tools, pots, compost, fertilizers, twine, canes, and so on. You want to find them again. Yes, I know that some of you just chuck them all in anywhere and others of you are meticulous about where everything goes, but those are two standards of filing.

In your bedroom you file different things in different kinds of ways: suits and dresses are put on hangers, underwear goes in drawers (sorry!), shoes go on the floor, toiletries in a dressing table or bedside cabinet. The point is that you are filing all these things – we just avoid using that word in places other than the study or office.

When you file in the study you are doing what you do all day long everywhere else in the house. You are putting stuff away 'where it belongs' so that you can find it again (point 1).

3: **File everything**

But come back with me into the study or office now. On the basis of what I have just explained, think about what you file there. It's not just paper (or digital files), but you presumably put the following away so you can find them again:

- books – your library is a key area of filing;
- stationery – everything from reams of paper to paperclips, envelopes to staples;
- equipment – from hole punchers to binding machines.

And then with paper this may be:

- letters;
- sets of papers for meetings;
- magazines or newspaper articles;
- financial items;
- handbooks.

And all this means that there are different physical forms of filing you can use, not just one:

- a conventional filing cabinet – yes, you can still use that;
- shelving on the walls – you can use vertical space so save your floor area;
- desk drawers of various kinds and sizes;
- archive or five-ream paper boxes.

Remember that the one place where you should not file but where most people do is your desk. Desks must never end up as convenient horizontal surfaces for homeless pieces of paper. They are for working at.

4: **Choose stationery**

So now that you have a better idea of what you might want to find again and have appreciated that this is no narrow set of sheets of paper alone, you can think about what you file things in before they go into the cabinet or on to the shelf. Here are some of my favourites.

- Plastic folders: the type that have two sides closed and two open. They can be cut back or cut flush. Stick a self-adhesive label on the outside and you have a brilliant receptacle for various sheets of paper – and a choice of colours. You can move them from filing cabinet to desk to storage box. If I'd claimed commission for selling

these to people at training events, I'd be a rich man.

- A4 ring binders: they've been around a long time but they are great for keeping sets of papers that need to stay in order (especially papers for meetings, record sheets, print outs of booklets, etc.). With card dividers within them you can keep crowds of things really neatly.

- Magazine holders: flat-pack card items that you make up to an open box for booklets, magazines, bound reports, etc.

- Box files: useful for series of papers. Best used for a number of plastic folders.

- Five-ream paper boxes: don't throw these away but use them for storage items.

If you have the paperless office you won't need any of these, but most of us are not there yet.

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We have now listed four issues of mindset and application. Now for three types of filing which I distinguish by how quickly you want to be able to find anything. If all you've got is two seconds you need a ***holding*** file, if 20 seconds would be OK, it's a normal ***filing*** file, but if two minutes would not be a problem, it's a ***storage*** file. Let me explain.

5: **Create holding files – permanent**

There are some things you need to be able to put your hands on in about two seconds (well, OK, five to ten seconds then). These are ***holding*** files and I'll introduce you to two types: first of all the permanent variety.

These are files you may want to use almost every day so they need to be easily reachable as you sit at your desk. My suggestion is to think of a few clearly labelled plastic folders left horizontal on trays of some kind. Don't have too many but here are some ideas:

- One wallet for each person you deal with regularly if this makes sense. So you receive something that needs to be passed on to a church officer – you pop it straight into their holding file which you take to church on Sunday or the next meeting with them.

- One wallet for the team you are part of. In this goes anything (including reminders to yourself) for the next team meeting.

- You might have one for telephone calls to make with a cover note to show when you

left a voicemail so you know to chase up a day or two later if necessary.

- I have a key one with items where I am waiting for a reply from someone. I check it almost daily so I can immediately spot anything getting delayed and take action.

- I have one for cuttings I am keeping but want to file them once a month, say.

Into this category you might also include a church address/telephone list (if not on your smartphone), any reference items you need regularly (the local train timetable in my case), and other such reference works.

6: **Create holding files – current**

But there is a second type of two-second holding file, and that is stuff you are working on this week or month which needs to be in easy reach – but won't be there once you have completed whatever you are doing on it.

If you are preaching this coming Sunday you might have a plastic folder of notes and ideas for the sermon. If you are working on the notice-sheet you might want to have your latest draft with notes left by people for inclusion. If you have a meeting coming up you might move the papers from a 'filing' file (see No. 8) to a holding file.

For many people these are items they leave lying around on their desk so you see them. But you are not allowed to do that as already explained. So you have them in labelled plastic wallets on a set of trays or something similar. This might sit next to your desk or may be in a desk drawer or somewhere where you can put your hands on it within a second or two. Some people call these 'projects' that are currently on the go.

7: **Move most stuff to storage**

Let me jump to the other end of the time spectrum and claim that the majority of what you are keeping (and from what I have already said you will remember that you are now ruthless in getting rid of more stuff than you think you can do so safely) does not need to be in ***holding*** or ***filing*** files but in ***storage*** files. In other words you need to keep it but you may not need to refer to it very often if at all. So to have it clogging up a normal filing system makes no sense at all. Put it into store and allow yourself two minutes to find something.

Storage files will normally be archive boxes or use, as I do, five-ream paper boxes or box files, which will be labelled but then stored on top of each other away from the study or office.

Let me make this clear: I am encouraging you to place the majority of what you see as your paper filing away from your immediate workplace so that you free up a significant amount of space in your study or office. What kind of things do I have in mind?

- Anything that you may not need to look at at all in the next year but which you need to keep because it is archive material of any kind, such as accounts.

- Probably most stuff in your current filing cabinet which you have not needed to access in the past year but, again, which you feel it would be wrong to recycle or shred just yet.

- Records of talks given, events organised, programmes overseen, etc. where you would like to refer back to them when you next do something similar but for which a two minute search would be quite

sufficient, rather than a 20 second limit on search.

8: 'File' what's left

If you have followed the above, you will not have much left. This is your filing! The less you have the quicker you can find anything, the less muddle you will have, the more you will be in control of your data. So you may now have one two-drawer filing cabinet instead of three four-drawer ones. You may find that four shelves on one wall is all you need rather than six. Devising a simple system so you can find things quickly will be more straightforward.

So my key to filing is to have very little of it. That may not work with your library because you may want to refer to any book there from time to time. But it should work for paper.

And of course some of you won't have much of that anyway because you have gone digital.

F: Categorise carefully

Now I need to focus on the middle type of my three categories – filing itself, although everything I say will apply to the other two categories too: holding and storage. My aim is to deal with how you go about this filing whether it is 'Word' or other files on your computer, emails, or paper filing in a cabinet or elsewhere.

This may sound dull (!) so I need to remind you that actually this is all about the challenge and fun (yes!) of giving yourself that 20 seconds to find anything that is filed: my last email to you six months ago, the ideas from the December staff meeting about next Christmas' services, the resource pack on holiday clubs, and so on.

As the whole point is to have a filing system that means you can *find* everything quickly, the key is to have categories in groups that make sense. I want to move you away from wasted time hunting for something put somewhere, to the satisfaction of having everything on screen or in hand within 20 seconds. It's a fun challenge!

Avoid the one long list approach

What I often see in Ministers' studies and church offices are:

- filing cabinets with lots of suspension files, maybe labelled, but covering all kinds of

topics in no particular order, unless perhaps alphabetically by whatever the tab says – and that excludes all the items piled on the floor because the cabinets are stuffed full;

- the equivalent on computers: lots of folders all in one long list, often muddled up with a range of files – sometimes strewn across the desktop;

- hundreds or even thousands of emails left in the 'In' and 'Sent' boxes on an Outlook or equivalent system.

Finding what you want is often time-consuming in these arrangements (even though search options for emails can help you find some things quite easily). 20 seconds every time? Forget it!

Here are guidelines for a different approach. The idea is to cluster files in a logical but simple way so that the route to finding whatever you are looking for is relatively straightforward. I suggest an approach that is *tiered* in structure and *coloured* in look.

1: **Define a small number of main categories**

First, decide on six to ten broad categories where files might belong. In your filing cabinet you might for example realise that almost all your files would fit into one of the following (for a Minister).

- Leadership teams and vision
- Worship services
- Rites of passage
- Events and courses
- Schools and children's work
- Teaching, groups and resources
- Church committees
- Administration and buildings
- Wider Church and community

Or, for an Office Administrator, it might look something a bit like this:

- Bookings for our plant
- Maintenance, equipment, supplies
- Finance, book-keeping
- Legal compliance
- Sunday print/PowerPoint
- Publicity, notices, website, social media
- Projects

The obvious way to help decide on this top level of categories is simply to work from what you have at present. Look too at your computer folders and files and decide quickly what kind of short list of categories makes sense for grouping them. You don't need to number anything – leave that for major filing systems, not personal ones. If you followed my advice so far, you won't have that many files anyway.

It can be helpful to have the same system in hard copy and electronic forms although this is not always possible or wise. The kind of things you keep in electronic form or in emails are not always the same as those you keep in paper. But keep your lists of categories as close to each other as you can.

You can adopt the same principle with your library (which is a key part of any Minister's filing

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When did you last see your carpet?

For clergy studies in a mess I offer my 'black bin sack' session. We spend half a day, or more, sorting it all out in a way that I shall show you which allows you and others to carry on after I have gone.

Ask me for details if interested.

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system). Most clergy, however untidy they are, will have all their commentaries in one broad group. Some will then separate books out into categories of biblical studies, church history, doctrine, discipleship, and so on.

2: **Put them in an order that makes sense**

In your filing cabinet you simply choose an order for these broad categories that will help you find things quickly. It does not matter hugely, but the Office Administrator would probably want 'Sunday print' and, 'Publicity' next to each other since they are both communication topics.

For both your computer and email folders they may go alphabetically by default, so add a number before them to put them in the order you want: *01 Leadership team, 02 Worship services, 03 Rites of passage* will put those three in that order.

The point is that when you are trying to find one electronic or hard copy file, your first question is, Which of these broad areas does this belong in? Having no more than ten categories means you can see the whole list on your computer screen or know it off by heart in your filing cabinet.

Remember the 20 second challenge! This bit should take you only two or three of those precious seconds.

3: **Distinguish these categories for paper items by colour**

Each of these areas will have a number of different files so choose a colour for each area and give each suspension file a tab in that colour. You can buy different coloured tabs, but it is easier to buy white tabs and run a highlighter pen across each one.

If you are using ring binders instead, a useful means of filing papers, bookings for events and other items which need to be kept in strict order, choose different colours for each set of binders so that red binders mean Church Council, yellow mean Committees, and so on.

If you are using box files you can buy them by appropriate colour too. You can also use coloured plastic wallets inside suspension files and box files in the same way.

Back in your filing cabinet, now space the tabs across the width of the suspension files so that the first file under 'Leadership Team' is on the far left, the next one somewhat to the right of this and so on – you can fit six across until you get to the far right.

So in the 'Maintenance, equipment, supplies' area for an Administrator you might have one suspension file for each of your main buildings, one for insurance, one for contractors, one for current projects, one for stationery, etc. All would have the same colour of tab and live together in order in one block.

Into each of these suspension files you might have a number of coloured plastic wallets, each with a self-adhesive label on them to name them. So 'Insurance' might have 'Current policy', 'Correspondence', 'Claims', 'Resources'. If you had too much paperwork for this to fit, each of these might become a suspension file themselves.

Now you have created a home for each piece of paper that you want to keep. And if you follow my advice in the part of this article and minimise your *filing* files by creating *storage* files, you will only have papers that you need this year in your filing system.

4: **Use different levels of folders for your computer files**

In your computer your actual files are the equivalent of items in your plastic wallets in your suspension files in the cabinet. So after your six to ten top level broad categories it can make sense to have a second tier of folders which are the equivalent of your suspension files, a third tier equivalent to your plastic wallets, and then a fourth tier of files equivalent to items in the wallets.

So a Level 1 folder might be 'Church committees', Level 2 would then be each committee in turn, Level 3 might be folders such as 'Minutes', 'Agendas', Papers', and level 4 the file of each set of minutes, etc. Or you might be able to omit one of those levels to simplify things.

You can of course keep a large number of Word, pdf, jpg and other files all in one folder because they will be stored alphabetically and it does not take long to find what you want provided you have a logical system. When trying to find a file it can often be quicker to reorder them by date so that the most recently opened files are at the top of the list.

For some types of files it can be useful to file them by date order anyway. Here you need to follow the American system and put the year first, then the month and lastly the day if you are sorting by name rather than by when last opened. If you do not do this they don't end up in the right order as you can quickly see! Examples would include sets of service sheets, newsletters, committee minutes, and so on.

Email folders follow the same principles. There is no harm in having a top level of email folders, a second level and then, if necessary, a third in some cases. You hover the mouse to open them up to view and close them down to keep everything on one screen.

5: **A word about email folders**

I am assuming a system in a program such as Outlook. If you are happy simply to use a search facility and to keep all emails in one folder and one Sent folder, OK. But I argue that it is much better to keep both incoming and outgoing emails in the same place (and you can usually delete the incoming one if you simply replied to it and it did not have attachments) so I always aim to have my Sent box empty. Everything is either deleted or dragged and dropped to its folder (or sub-folder).

I hold even more strongly that people lose emails in their Inbox if they leave them there, so I recommend the Inbox is only used for emails not yet dealt with – and this should ideally never be more than one or two screens' worth unless you have heavy traffic. Once dealt with they are either deleted or moved to their appropriate folder or sub-folder.

So drag and drop every incoming and every outgoing email that you are not deleting (and I would expect you to delete more than half) into its correct folder. There is just one snag and that relates to the default fields of view – see Training Notes TN53 in the Resources section of my website for how to rectify this.

Recap: The concept of tiers of filing

What I have done in this system is to take you away from random files, or a list of 100+ files on your computer all at one level, into a system of tiers and then logical ordering by colour.

On the top level are your select number of major categories. In a computer or email system these are your top level folders – and they are clearly visible on one screen because there are only a few of them.

At your next level are your suspension files in your paper filing system, your ring binders in that system, and your second level folders (or actual files) in your computer and email systems. Don't be afraid to go to sub-folders in your computer (and sub-sub-folders). They are a useful way of mapping the route to find the file you are after.

At your third level are your plastic wallets inside your suspension files in a cabinet, your card divisions within ring binders perhaps, and the next tier (if needed) in a computer or email system.

It should now be straightforward to find a specific file, and finding is what it is all about. Provided you keep the system up-to-date and avoid a filing pile by filing everything the moment it is ready for filing, you should find this works.

Summary

1   Your aim with paper (and with other forms of communication) is first to sort each item to a logical place – or action it if you can do it within a couple of minutes. It is sorting that is the vital point.

2   You need a disciplined approach to sorting, and your aim is to discard/delete as much as possible as quickly as possible.

3   You sort everything to a location by what it is that you need to do next with it. This location is not on the desk and can be out of sight.

4   If you sort to somewhere other than a holding file (you check these each day) you note in a diary system when you are going to deal with it. Then you can relax and forget it until the due day and time.

5   The key to filing is finding. 'Holding' files are for items you need to find within two seconds, 'filing' files within 20 seconds, and 'storage' files within two minutes. These times are designed to offer a challenge and introduce some fun into the exercise!

This article is available at https://www.john-truscott.co.uk/Resources/Articles-index then A37. It is based on a series first written for *Maintenance and Equipment News* and on John's training courses for Ministers on deskwork. See also Articles A1, *Pass or file*, A25, *Working from home,* and A51, *The 'To Do Diary' guide,* plus Training Notes TN23, *How to do 'To Do' lists,* TN53, *A simple email filing system,* and TN57, *Clearing your clutter.*

John's resources are marked for filing categories of Leadership, Management, Structures, Planning, Communication, Administration. File A37 under Leadership (with a link to Administration).

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