



## **Action plan for organizing paperwork**

1. Assess your current filing system.
2. Set up files for the various categories of paper generated in your business.
3. Gather together stationery supplies.
4. Work to a time limit which allows you half an hour at the end of the session to finish off properly.
5. Sort papers one by one as follows:
  - Action – put anything that needs to be dealt with (e.g. bills to be paid) into the action tray.
  - Bin – junk mail and old papers go into a bin bag for recycling.
  - Shred – confidential papers should be shredded.
  - File - anything to be kept should be put in the appropriate file.

NB Keep home paperwork separate.

  - Archive – keep papers that are need long term (e.g. tax records) in clearly labelled boxes in the loft etc.
6. Use the last half hour to tidy up and deal with any items requiring urgent action.
7. Stand back and admire your handiwork!

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