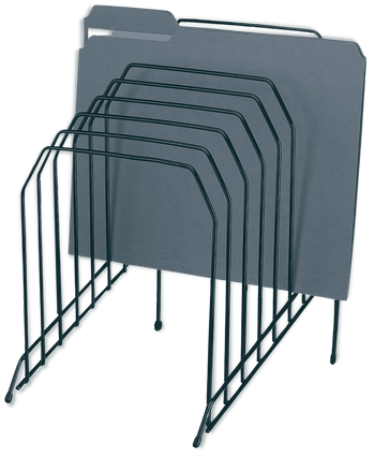
HOW TO SET UP A CASCADE FILE SYSTEM FOR GREATER PRODUCTIVITY

Getting organized is not an event. It's a change of mind.

If you've heard me deliver my Maximum Productivity training, you've probably heard me say that getting organized is not an event--it's a change of mind. Spending Friday afternoon or coming in on a Saturday and filing a bunch of papers or throwing away some outdated files doesn't mean that you're now organized any more than eating a salad for dinner suddenly makes you healthy. Getting organized means that you've taken the time to conceive a system that will accommodate for the day-to-day flow of paper and e-files that come into and out of your realm of influence and responsibility without piling up, getting lost, or sitting unaddressed for a long period of time. With that in mind, let's start conceiving that new system for you.

Most desks have at least one pile of papers, folders, and other various items that becomes the "catch-all" vacuum for anything that comes to that desk which can't be dealt with and dispensed of immediately. Most people can tell you what's in their pile, and can even access a particular item from it fairly quickly. Some people try to rationalize it by calling it a “to-do” stack or by leaving it in their "in tray," but in reality it is still a black hole for not-so-urgent papers. The two problems that come from it are a desk that doesn't look very organized and the lost seconds (which turn into minutes) it takes to thumb through it multiple times a day to find that one thing you're currently looking for.

How to get rid of your pile



Here's how you can get rid of your pile and become more efficient. Purchase a cascade file holder (also called an incline file sorter). These are the upright “folder-holders” that are divided into (usually) 6-7 slots that get higher to the back so you can see multiple rows of folders at the same time. Fill it with three folders per slot; one left-tab folder, one center-tab folder, and one right-tab folder. Label the folders with the most common designations for the papers that come across your desk most often. Highest frequency to the front--lowest to the back. If you're like me, you may want to label the folder tabs with a pencil so that you can change them easily if needed. At the bottom of this article are several suggestions you can use or that at the very least can stimulate your thinking as to what will work for you.

Once you've got the cascade file and folders set up, begin eliminating the stack by never adding to it. Sounds too simplistic, but it really works. Every time you go through "the stack" and pull something out, put it in its new rightful place. If you don't have a place for it in your cascade file (and decide at that point that you don't want a folder for that in the cascade file) then make a new folder in one of your file drawers of your desk, credenza, or filing cabinet. As new items come to your desk, put it in the right place or create a place for it before it goes into the stack. Eventually, there will be a place for everything, and you'll break the habit of having the stack.

As you label the folders, think about which ones you pull out of your desk most often and in which categories the papers that stay in that stack on your desk for the longest time would fall.

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Here are some suggestions for folder labels that will work on almost everyone's desk.

In the first slot of your cascade file holder, label the three folders...

ASAP - Things that will take precedent over everything except what you're currently working on. This folder should never get very full.
Today - Items that must be done before the work day is over.
To-Do - Tasks that aren't pressing (yet) but can't be ignored for long, nor can they be delegated.

In the second slot of your cascade file holder, label the three folders...

Call to Follow Up
Waiting for a Call Back (These two folders are holding places for documents you'll need when you have a phone conversation or that can not be processed until you receive some type of information or response from someone else.)
Temporary Hold (which would be for items you anticipate not processing for several days or weeks).

Suggestions for the other slots/folders

- Individual folders for people you talk with daily or multiple times each day, including internal and external customers. This will allow you to collect several items for one trip to their office or to await the next time they come to your office.
- One for Purchase Orders or Invoices waiting to be matched up with something you haven't received yet.
- Fax Cover Sheets
- Several copies of forms/one sheets that you access frequently to give to internal or external customers
- A "Travel" folder for airline confirmation forms, travel itineraries, conference information/agendas, hotel reservation info, etc.
- One for things like articles or newsletters that can be read a few minutes at a time each morning, while you're on hold, in the airport/on the plane or in a hotel room on your next trip.
- You may want a folder in which you can file items that you'll need for a weekly meeting.
- If you receive reports on a regular basis that can't be thrown away until a more up-to-date one replaces it, you can create a folder for those.
- If your job consists of lots of short and medium range projects, you can create a folder for each project.Once you finish a project, you simply move that project's folder from your cascade file to the appropriate place in your desk, credenza, or file cabinet so you can easily refer back to it in the future.

Remember:
It has to be a system that works for you. The specifics I've written here are not as important as the idea that I'm trying to convey. Be creative, and allow it to be a dynamic tool that you constantly change and update to fit your current needs. Feel free to contact me if you have questions or need help with more ideas for your specific needs. HAPPY ORGANIZING!

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