Controlling the paperwork

You see things; and say 'Why?' But I dream things that never were; and say 'Why not?'

George Bernard Shaw

Let us start on a positive note. Paperwork need not overpower you. You can keep it under control, though you may not be able to eliminate it altogether. It is necessary, or certainly some of it is, and here we are 20 years after the IT experts began to talk about the 'paperless office' and there still seems to be as much as ever on my desk. Letters, memos, faxes, reports, forms, proposals, and more, all combine to create a steady stream of paperwork across your desk. If you are not reading things, you are writing them, and if you are not doing that you are processing things that involve paperwork. All this can take up a significant proportion of your working day. In time management terms the job is to:

■ eliminate it;
■ minimise it;
■ process what must be there promptly and efficiently.

Here we consider a range of ideas, large and small, that can

help you keep the paperwork under control. It is not exhaustive, no such review could be, but these ideas are an important way of thinking about how papers should be dealt with. Ultimately, because what constitutes the papers on any individual's desk is unique, we must all find our own solutions to this problem. The principles here, however, are selected to provide a suitable foundation for that basis. And as good a place as any to start is with some thoughts about minimising the volume of paper you deal with day to day.

Aim to minimise paperwork

Perhaps the first thing to ask in this area is simply: is all your paperwork really necessary? Let it be clear straight away, much of it will be. One such example, which this book has already recommended, is that your work/time plan be in writing. But some paperwork can be eliminated, and often all that is necessary is to pause for a second before you write something, and ask yourself whether what you are about to do is really necessary. Have a look at what is on your desk, see how much of it is not really necessary, think how much of it could achieve its aims in some other way. Yet, someone is sending all this to your desk and is presumably well intentioned in doing so. Perhaps much of what you create on paper is similarly regarded.

So, what do you do about it? The key alternative to written communication is the telephone; it is usually much quicker to lift the telephone than to write something, and, as not everything needs a written record, this is one of the surest ways of reducing paperwork.

It is also worth a note here about the now ubiquitous e-mail. It is not so much the sense of urgency this bestows on things that interests us here (though it is undeniably useful), it is the style. It seems that an altogether less formal style has developed for e-mail, one that is perfectly acceptable internally in a big

company with a number of offices, and between external organisations, as a quick form of communication where brevity is essential. Brevity saves time, but it must be easily understood too. Print out and file e-mails where appropriate, and keep those listed in your computer manageable.

Two other points are worth a mention. In the interests of slowing the destruction of forests to make paper, as much as time, consider copies. It is one thing to write to someone, but it is the circulation of copies that feeds the proliferation of paperwork as much as anything. Think before you list half the company; who really needs a copy?

Can your document be standardised? There may be a number of routine communications that can be recorded in the word-processor – either whole letters or documents or separate paragraphs that can be used to put together something suitable. Here technology really does save time. But there is one very important caveat here. Never – never – use standard material if it is inappropriate. In the sales area, for example, I see many letters and proposals that shout 'standard' when they should be seen as an individual response. Further, any standard material should be double-checked to see that it is well written. Otherwise, by definition, something poor or, at worst, damaging may be sent out repeatedly. It can certainly save time but should not do so at the cost of an unacceptable reduction in quality.

Make a habit of brevity

Your written communication will be less time-consuming if it is not only brief but, choosing my words carefully, succinct and precise and, of course, clear (this is not the place for a treatise on making communications understandable, but communication should never be assumed to be easy. It is often the reverse, and misunderstandings must be responsible for a massive

amount of wasted time as things are queried and clarified). This is worth a short (sic) paragraph here because I notice many people have a curious reluctance to write short business letters. An example makes the point: A writes to B prior to a meeting asking when his flight arrives and whether he would like to be met at the airport. So often the reply will be along the lines of:

> Dear Mr A,
> Thank you for your kind letter of 24 July 1993 about my forth-coming visit to your offices next week on Thursday 30 July. I am pleased to say that all my travel arrangements are now complete – you may remember I was having trouble with one of the connec-tions – and I now have full details. I arrive on Flight 915 at 10.00 am. This should suit our lunch meeting well and not make any problem with the timing. With regard to your kind offer to meet me, perhaps I could say how grateful I would be for your assis-tance in this regard…

And so on. If the two know each other even a little, surely there can be nothing wrong with something that says:

> Dear Mr A,
> It was good to hear from you. I arrive on Flight 915 at 10.00 am on 30 July. It would be a great help to be met at the airport; I will look out for your driver. Many thanks, I look forward to seeing you soon…

I know which I would prefer to receive: the second. The infor-mation is clear, I do not have to wade through any extraneous material, it saves me time, and may well be one-third or one-quarter of the length of the first one. And it took less time to

write and send. I think it is still perfectly polite and I wish more people adopted just this kind of approach. If it can be said in three lines then say it in three lines. Now consider the time saving of three-page memos reduced to one, reports of 10 pages instead of 20… but I promised this would be a short paragraph. Enough said; point made.

Minimal memos

The well-known memo makes up a major part of the paperwork in many offices. In the last paragraph, I made a plea for brevity; here is a simple idea that can save even more time. Assume you receive a memo – a full page of some colleague's meanderings no doubt – and what it says is just: 'Can you attend a meeting of the planning committee at 3pm this coming Friday?' Assume that you can and are prepared to attend. Now all you need to do is photocopy the memo that came to you, write 'TO:' at the top and ring the name of the original sender, write 'FINE, SEE YOU THERE' at the bottom and sign it. If you really want to be rash with time, take an extra second and add a ring round your message to highlight it (a red pen does this nicely). Then send it back.

Excuse a touch of sarcasm here, but one so often sees people laboriously preparing typed and sometimes over-long memos when this kind of procedure will do very well; some companies have pre-printed sheets for their memos that are designed to take a reply. E-mail is helping this process; many e-mails are brief, and this developing style seems set to become a habit. Remember, however, the comments about the time-wasting tendencies of e-mail already made.

A final thought. In such circumstances you can always telephone, though consider who it is and how long they will chat and whether they would appreciate confirmation in writing for the record.

Minimise your paper handling

Here is an interesting experiment you can try (it will not take long and could end up saving you time). Select 10 or so items that come across your desk today, a mixture of letters, memos and documents, all of which demand some action on your part, and mark them all with a red spot in the top right-hand corner. Then simply deal with them as normal. And every time you touch them thereafter add another red spot to the top right-hand corner. As time passes you will then produce a count of how many times things go through your hands. For example, a letter arrives today and:

■ you read it;
■ you decide not to deal with it immediately but put it with a job on which you intend to spend time in the afternoon;
■ in the afternoon you make a start, work out what needs to be done but are interrupted;
■ the letter joins a number of items that overrun the day and you pick it up again the following morning, and so it goes on.

In this case we are imagining just a simple letter. In other cases, projects and processes span weeks or months; you can imagine the incidence of red spots. This is known as the 'measles test' and it can help you identify how your way of handling things affects the time that dealing with them takes. Sometimes the multiple 'spotting' is necessary, but other cases may well surprise you because you had no idea just how often some things cross your desk before they are resolved. The first step towards change is to know where change should be applied. The information gained in this way will be useful. Sometimes improvement is easy, for example the use of a Prompt File (see Chapter 3) will cure some 'spotting'. In other cases it may lead you to review your method of handling certain tasks. In any

event, you should adopt the principle of trying to handle things the minimum number of times before they are resolved.

If you have a clear plan and a system for categorising your work then things should be dealt with immediately, or held for some reason and then dealt with. If this is applied rigorously, then the time taken up by papers being handled many times will be reduced. But again let us be realistic. Most jobs are not, in fact, made up of thousands of completely separate tasks, though it would perhaps be easier if they were. For a lot of people there are a great many links between different items and areas; indeed an element of some jobs involves creatively seeing links that can be turned into opportunities, and with the process of what is called synergy (or colloquially the 2 + 2 = 5 effect). All of this may demand sufficient review of the situations represented by your paperwork for this opportunity process to be possible. So this rule, like some others, must not be applied slavishly. You need sufficient sight of some items to operate effectively and must be careful not to reduce paper handling in a way you feel does not suit or work well in your individual job.

I have no wish to create a straitjacket for readers with anything I suggest. However, the principle advocated here is sound and as a general rule being aware of how many times things go through your hands and trying to keep that number down makes good time-sense.

Do not let files and filing waste time

I once saw a cartoon that showed a picture of a world-weary-looking secretary standing by a manager's desk. She was holding a bundle of papers and the caption depicted her saying: 'Do you want this again – or shall I file it?' And there, in a nutshell, is the problem of filing. Too often it is used simply as

a way of getting paper off the desk, and while there is some sort of system to suggest where papers go, there is no real thought about just what should be kept, or for how long, and it is this that wastes time. A frightening statistic emerging from a survey in one multinational giant showed that only 10 per cent of the papers put into filing were ever referred to again; this in an organisation proud of its efficiency – what hope for ordinary mortals?

This means that 90 per cent could have been destroyed, and the cost of 'keeping them at the right temperature in comfortable surroundings', as the survey called it, is enormous. The time wasted, our consideration here, is equally worrying. But some things do need to be filed, so you cannot throw the baby out with the bath water; you need a system.

By all means let a secretary design or help with the design of a system, but to achieve consistency you should always decide what goes where. Do the papers about that reorganisation go under R for reorganisation, O for organisation or office, E for efficiency drive, or B for boss's pet projects? There are often serious problems here, as anyone who has tried to locate a file, say, a year old, knows; few have memories that will hold this kind of detail forever. So, get the system right. It is difficult to generalise, you may need account files, project files or a dozen more; or all of these. It is usually better to have a number of categories, each A–Z, rather than one giant system that has to cope with everything. As you review potential filing material you only really have three options for action:

- do not file it, throw it away;
- file it with no thought for how long it will stay there;
- file it with a clear indication of a destroy date (or at least a review date).

Let me prompt you to think carefully about how much you need to keep things and then review some ways of keeping

filing under control. Consider what is on or around your desk at present. How much of it could you throw away right now? Probably the answer is very little. But imagine those same papers in the future, how many of them will you need in six months, in a year, in two years? Here the honest answer will be fewer and getting even fewer as you go into the future. So why not throw more away?

Think about where else things are held. If you need to check something in, say, a regular financial summary only once in three months, why even have a file on it if you know you can get it from the accountant in 30 seconds? Think about the things you hold 'just in case'. In your heart you probably know you are not at all bad at judging what will be required, yet you still keep too much. Trust your instincts, remember the old saying: if it looks like a duck and quacks, then it probably is a duck. If you are 99 per cent sure it is going to be rubbish very soon, you are probably right; after all, they are your papers. So throw them away.

But if you are wrong and need something you have thrown away, which may do more than waste time, consider some insurance. There are two systems that will provide this. First, batch filing – this is where filing is not done too early. Everything is put in simple A–Z order in a batch file and only filed after, say, a month (you pick the time). But before it is filed you look through it to see what you still want to keep. After even one month, you might be surprised how much you ditch. Second, the 'chronology' file – this system works by filing an extra copy of every letter and document produced for you in straight A–Z date order in something like a large lever arch file. This is kept for a fixed length of time, maybe a year in quarterly files to make it more manageable. Every time the fourth quarter file is full, the first quarter file is thrown away and you start a new quarter file with the current material. Either or both may suit you. They let you be a lot more ruthless in throwing paper away, because on the odd occasion you are proved wrong you can find it in the back-up file.

Many systems benefit from a destroy system. This can be done by setting dates (perhaps in year batches) or even very simply by capacity. I have one file, kept in date order, which works by throwing something out of the drawer every time something new is added. The drawer is always just on full, and this corresponds well with how long the contents appear to remain useful and no one has to waste any time over it.

This area must be systemised on a basis that works for your office. If things are well ordered, if you can find what you want (and this is inherently easier if there is not so much in total to look through) and do not have to spend time constantly re-sorting the system to make room for more and more, then it will work well and you will run it and it will not run you. Order in the filing must save time.

Note: if your files are, even in part, in your computer, consider what printed versions you should have – *and take regular back-up files and store them separately*. I know you know this, but do you do it?

Keep papers neat

I like to think that I never lose things (well rarely!). But on the last two of those rare occasions, I discovered the lost papers caught under a paper clip hidden at the back of a batch of different correspondence. It is a small point perhaps, but you can waste some time hunting for papers and re-collating papers that have got out of order in this sort of way. Paper clips are not the best way to keep papers tidy. Beware – they do tend to trap other items and catch you unawares.

But papers must be kept tidy. Do not keep too much together (it becomes unmanageable), and worry in particular about files and papers that travel about with you both around and out of the office. Staple them, punch them or bind them rather than use paper clips, and experiment with whatever sort of files –

and there are many different styles – suit you. I favour the sort that have a small top and bottom flap to hold things all round and elastic bands that snap across the corners. The more things you have to work on in parallel, the more your current papers need organising neatly.

If you only get one file out at a time and work on that until it is neatly replaced by something else, then it is less of a problem. If you are paid to keep many balls in the air at once, then it is vital. Time management is, in this respect, similar to juggling. If there are a lot of balls in the air and one is dropped, more tend to follow. The more you have on the go, the greater the disruption and waste of time if something becomes disorganised. Keep papers physically under control.

Computerise it – but carefully

It has become one of the great 20th century myths that computers will transform office work, and make everything fast and efficient to action. But like other great promises ('Our cheque is in the post') it is not entirely to be trusted. Now, I have nothing against computers and there are things that one cannot now imagine working any other way, and yet… there are questions, certainly as far as efficiency and time utilisation are concerned, at desk level for the individual executive. There are examples of things now available that manifestly work well:

■ computerised databases that can be accessed on a desktop PC and dramatically reduce the time needed to sort through, analyse or communicate with those names on them;
■ graphics programs that can turn a set of confusing figures into a graph and impart a key point in a moment;
■ desktop publishing (DTP), which means documentation can be produced in-house at the touch of a button,

removing the need to liaise with three separate outside suppliers;
■ e-mail systems, which can allow easy, rapid communication with a branch office, say, or overseas contact, and allow you to peep into their files;
■ computerised versions of things like drawing diagrams, analysing figures, interpreting statistics (and playing noughts and crosses!), which make their manual equivalents look positively quaint.

You can probably think of many more. Some you will use and regard as routine, and many can save time. Yet, there are systems that for all their cleverness do not fit their role so well. Think of some of the systems you may be frustrated by as a customer, in the bank, insurance company or hotel. Consider a hotel account. They are, presumably, efficient for the hotel but many are very difficult to fathom without a degree in abbreviations. Customer service suffers. So there is another side to computers; you need expert help to set up many systems (and in some cases to operate them), there is a high capital cost though this is coming down, and they are all too readily used as an excuse for not doing things (if I had a small coin for every time I have heard someone in a travel agents say: 'Sorry, the computer is down', I could travel round the world free). Above all, they take time to set up and the equation of time must be carefully balanced to see what makes best sense.

There are things in this area that are great time savers. There are also pitfalls, costly in time, for the unwary. By all means use what you can, check out new things as they become available, but consider the alternatives as well and you may conclude some of them still hold good. If you can find that telephone number faster just by turning it up in a pocket notebook, why not do just that until something comes along that really is better for you?

Do not duplicate information unnecessarily

There is time expended in maintaining any information system. If the information is being recorded in identical or similar form in several different places, then the time is longer. This is worth checking, and there is a quick check you can run in a few moments. Rule up a matrix with information on one axis and places where each is kept on the other. If this produces columns of ticked boxes, then you may be holding information in too many places.

Such an analysis will quickly show the extent of any kind of duplication – and the sheer extent of the recording going on. If you then think about where information is most often sought, you may well find that only a minority of places originally listed are highlighted. This in turn poses questions about the other places where the information appears. How many of them can be scrapped or reduced? Time and neglect, or if you want to feel better about it, concentration on other matters, allow a proliferation of systems and information over time, sometimes far beyond what is really useful at present. Incidentally, another area to watch is computer information systems in which the technical ability to include extra information is often sufficient reason for it to be included. It is the use that is made of such sources that is important.

Do not proliferate information unnecessarily

Sometimes tasks seem important and then something happens that shows that this was not true at all, or perhaps not true any more. One thing that sometimes happens is that time is wasted because once something is originated then thinking about it ceases. An experience of mine will illustrate this. In one

company where I did some work, I asked if they had certain information (sales analysis). At first, the answer was that they did not, then someone in the sales office said that they in fact sent such a breakdown to the Managing Director's office each month. The Managing Director denied all knowledge of this, but his secretary, overhearing the request, said she held a file of the information.

We checked and there it was. It arrived on her desk each month and she filed it. On tracking this back, we discovered that some two years previously the Managing Director had asked for this special analysis and a summary for that month had been produced. He had looked at it and put it in his secretary's filing tray, and she had opened a file for it. The sales office produced it again the next month, sent it to the MD's office, but his secretary filed it without showing it to him. This had then been repeated every month for two years! It took someone in the sales office several hours each month to complete the work to produce the figures, and, after the first time, it had all been a complete waste.

Such situations continue all too easily once the initial moment has passed. Just who was at fault? The sales office, the MD, the secretary? All three? It *just happened* they might say but, more to the point, could it have been prevented? You should make a rule that whenever you are asked or need to provide any information to anyone (with copies to whomever else), you make a diary note to check at some time in the future – in 6 or 12 months perhaps – whether it is still necessary. Find out whether it still needs to be sent:

■ with the same frequency (would quarterly be as good as monthly?);
■ to all the listed people;
■ in as much detail (would some sort of summary do?).

Any change that will save time is worthwhile and you may find that it is simply not necessary any more. Very few people will ask for information to stop coming to them, but if asked may well admit that they can happily do without it. Be aware of this

sort of thing, or it is quite possible that all around your organisation things will be repeated unnecessarily.

Do not put it in writing

I felt for the course delegate who told me that a 20-page report he had been asked to prepare had been handed back by the manager to whom he presented it with a request for a verbal summary. While he had lavished care and attention on the report, he was unprepared for this and his spur of the moment presentation was not as fluent as he would have wished, the matter to which the report referred was dropped and the report was never read (it was no doubt filed rather than destroyed). He was naturally aggrieved and resented the incident – with some cause perhaps.

Certainly, management ought to consider the time-wasting consequences of its action, decisions and requests. What avoids something taking up time for you may land someone else with a great deal of extra work. If you are a manager, your responsibility for good time utilisation covers the team. It is little good being productive yourself if everyone else is tied up with all sorts of unnecessary tasks and paperwork. Jobs need to be done, action taken, consideration given and in many cases written instructions, guidelines or confirmation are not simply necessary, they are vital. But on other occasions that may well not be the case. The report referred to above should, in all likelihood, not have been requested. Certainly, the action, or lack of it, was decided upon without the detail documented in the report being looked at, and presumably the manager concerned felt he had enough information to make a valid decision. This kind of thing can often happen. Time may be wasted unless the instigator of such action thinks first and only specifies written details of something if it is really necessary. Similarly, those in receipt of such requests should not be afraid to ask, and check whether such exercises are really necessary. Whichever category of person you are in, and it may well be both, give it a

thought. Of course, there are other considerations. If you just say 'Shan't' next time the Managing Director asks for a report, do not come crying to me if you are read the riot act. But in many circumstances, a check can and should be made (even with the MD) and less paper is put about as a result.

Write faster

Now 'Write faster' may seem in the same category of advice as maxims such as 'Save water, shower with a friend', and you may well ask what you are supposed to do – rush through things so that you write rubbish? No – the point concerns the quality of writing. Think of the last reasonably complicated document you had to write, a report perhaps. You had to think about what to say and how to say it, and design the structure and sequence in which the message was to be presented. All this might have taken some time; so too could have editing to get it right.

A systematic approach, one that decides the message first and considers exactly how to put it second, thus separating two tasks and making the whole thing less complicated, will not only help you write better – it will make you write more quickly. It is beyond our brief to go into the detail of this here (see *How to Write Reports and Proposals*, published by Kogan Page, in which I have written about this in some detail). Suffice to say that if you must regularly write then this is an area worth some investigation.

WPB – the most time-saving object in your office

Finally, in this section the nature of office paperwork is such that it is only right to end by returning to the simple premise of throwing things away. The WPB is, of course, the waste paper basket. It helps efficiency and time if your desk and office are

tidy, if what you need is neatly and accessibly placed – a place for everything and everything in its place – but not if such good order is submerged under sheer quantity of paper, most of it of a 'just in case' nature.

All sorts of things cross your desk: magazines, direct mail, items marked 'To read and circulate' and 'For information', copies of things that are of no real relevance to you and minutes of meetings that you wish had never taken place. Much of this causes you to pause for far too long, creating heaps and extra filing trays and bundles in your briefcase (things to read at home, for instance). It is better to deal with things early rather than later. When it has mounted up it is always going to be more difficult to get through, and an imme-diate decision will keep the volume down, for example:

■ If you are on a circulation list and do not want to look at something today, then add your name further down the list and pass it on; it will get back to you later when you may be less busy.
■ At least check a magazine once, maybe you can tear out an article or two and throw the rest away.
■ Consider very carefully whether the vast plethora of things that 'might be useful' are, in fact, ever likely to be; either file them or throw them away.

All these kinds of thinking and action help, but most people are conservative and reluctant to throw things away. Unless you are very untypical, there will be things on and around your desk right now that could be thrown out. Have a look, and, as you look, do some throwing. Make a full WPB a target for the end of the day. Imagine it has a scale running down the inside to show how full it is. This scale could almost be graduated, not in volume, but in minutes saved. The paperless office may still be a way off; in the meantime, keeping what there is under con-trol is certainly an important part of the time management process.