



5-STEP  
SYSTEM TO  
FIX  
PUT-AWAY  
PARALYSIS

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"A GOOD SYSTEM  
SHORTENS THE  
ROAD TO THE  
GOAL."  
—ORISON SWETT  
MARDEN

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# THE 5-STEP SYSTEM

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## **STEP 1 - HOT-POTATO SORTING**

GOAL: Clear off surfaces quickly.

SUPPLIES: 4 bags or boxes, pen

BASIC TO DO: label containers and sort quickly:

"Trash," "Paper Recycling," "Return To Store/Friend,"  
"Keep"

## **Step 2 - SORT THE KEEPS**

GOAL: Decide what to do with what you're keeping

SUPPLIES: 2 bags or boxes, pen

BASIC TO DO: label containers and sort quickly into

"File" or "Act"

## **STEP 3 - SET UP YOUR FILING SYSTEM**

GOAL: Set up places to file before you begin filing

SUPPLIES: file container, hanging files with labels,  
pen, To Do list

BASIC TO DO: create labeled folders for file

categories: "Active Financial," "Active," "Renewable,"  
Resources," "Permanent," "Taxes"

## **STEP 4 - FILING**

GOAL: get all the "File" items put away

SUPPLIES: file folders from Step 3

BASIC TO DO: decide where each item is going to live,  
set aside 3-dimensional items, add To Do's as needed

## **STEP 5 - MISCELLANEOUS**

GOAL: put away all 3-dimensional or unusual items

SUPPLIES: as appropriate

BASIC TO DO: sort into broad groups, find logical,  
one-step places to put away



## 6 FILE CATEGORIES

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### 5-STEP SYSTEM TO FIX PUT-AWAY PARALYSIS

**1. ACTIVE FINANCIAL** files include paid monthly bills, bank statements, receipts, etc. (Store close to your work space.)

**2. ACTIVE** files include anything that requires your attention on a regular basis – bills to pay, calls/letters to write, pending matters, projects, reimbursements, to do's. (Store close to your work space.)

**3. RENEWABLE** files include take-out menus, address lists, association/club info, employee benefits, insurance policies, miles program statements, social security statements, children's activities. Purge these papers when updated versions become available. (Store adjacent to your work space.)

**4. RESOURCE** files contain information about hobbies, future planning, gift ideas, recipes, etc. (Store adjacent to your work space.)

**5. PERMANENT** files include important documents like birth certificates, career history, health records, investments owned, warranties, home records. (Can be archived but accessible.)

**6. TAX** files include the previous years of returns and supporting documentation. (Can be archived but accessible.)

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"GOOD ORDER IS  
THE FOUNDATION  
OF ALL THINGS."  
—EDMUND BURKE

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