



Organizing a Paper Organizer

Many people have asked for my suggestions about setting up loose-leaf organizers. I used one for years (before I switched to the Palm), and if I were to go back to a paper-based planner, I would set it up something like what I have recommended below.

An advantage to paper-based organizers is the capability of a better and faster visual overview and context. And even though the separate paper lists could be kept anywhere in the system, it is nice to group them based upon how they are accessed.

I carry a letter-sized 3-ring binder demo mock-up of this kind of organizer with me in seminars, and the one I put together cost about \$12 at Staples (most of that cost is for the binder.) You can pay tons more for classy graphics and covers and accessories (which I often did) but it is not required. The only preprinted forms you might need would be calendar pages and telephone/address pages. Otherwise, you could easily get by with plain lined notebook paper, on which you could make your lists.

Size is more a matter of aesthetics and logistics. Letter-sized notebooks have the advantage of holding standard paper that can be printed or copied, and finding inexpensive forms and accessories in standard stationery stores. Mid-sized planners have the advantage of convenience of writing in places of more limited space and slightly less bulky for schlepping around in your gear.

I suggest eight tabs and sections, in this order in the binder:

Notes/"In"

The portable in-basket. For capturing random notes to be processed later--voicemails, meeting notes, random thoughts, phone conversation notes, etc. Process and purge regularly.

Calendar

Lists day- and time-specific actions and information--appointments, have-to's for the day, and things we need or want to know on or about that day.

Action Lists

The lists of pre-defined actions to choose from when we have discretionary time--next steps on projects and single actions that need to get done as soon as we can do them. Can be broken down into subsets by context of where the action has to happen--at home, at computer, at phone, errands, etc.



Projects/Goals

The more-than-one-step outcomes that we need to keep reminders about--the “open loops.” This section can also include the bigger-picture outcomes, such as professional goals, personal visions, values, etc. as well as the “someday/maybe” kinds of things we want to keep alive for review. This section to be reviewed at least weekly to ensure there are actions on the active projects in the system.

Agendas

Things to bring up when we meet or talk with individuals or groups, organized by the person or the meeting.

Project Planning/Notes

Place to hold support material for projects, themes, and topics. Project plans, project support materials, etc. To be used to capture project thinking, and for reviewing as needed to ensure appropriate next actions on the action lists or agendas.

Reference/Misc

Various reference lists related to interests and activities, and a general “catch-all” section.

Tel/Add

The basic Rolodex of names and addresses.