

Module One – The In-tray

How to design YOUR in-tray system for YOUR innate style and unique situation

What is an in-tray?

An **in-tray** is a special **container** which **TEMPORARILY holds** items coming **in** to your home or office **until** you make time to **attend** to them.

The key to an effective in-tray is that you treat the in-tray as the **first location** in your **paperwork's journey...in, through and out...**of your paperwork **system**.

Your goal is to set up an in-tray which suits, serves and supports your incoming paperwork.

The humble in-tray should never be underestimated for its impact on your paperwork system.

Why do I need an in-tray?

You need an in-tray to **control** and **manage** the avalanche of paperwork you receive on a regular basis. An effective in-tray will:

- Eliminate paperwork creep – paper all over the place!
- Eliminate new paper piles – paper piling up awaiting your attention!
- Ensure you know the location of all your new paperwork
- Control this first, critical stage of your system
- Eliminate the need to search for recently received paperwork

Where should I place my in-tray?

Where you place your in-tray depends on a number of factors:

- The number of people using the in-tray
- The layout of your home or office
- Personal preference

Most people place their in-tray in one of the following places:

- Near the front door or entrance because it's the first stop when coming home from work.
- In the kitchen because that's where they dump their bills
- In the office or study because that's where they do their paperwork

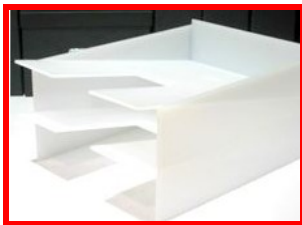
You may place your in-tray anywhere that suits your situation, but you need to give it some thought.

What sort of container should I use as my in-tray?

Your choice will depend on the quantity and the quality of items coming into your space and also on the number of people requiring an in-tray.

- The quantity is simply the number of items coming in on a daily basis
- The quality includes things such as:
 - The shape of items (eg DVD's, books, business cards, brochures, packages etc)
 - The nature of items (confidential items, fragile items etc)
- The number of people requiring an in-tray will be a major determining factor on your choice of container. (eg an office with 10 people may require a pigeonhole in-tray in a central location, a family of five may require 5 magazine boxes)

There are many types of containers you can use, the most popular of which are:



Single or tiered in-tray



Magazine Box(es)



Box(es)



Drop Down Files are great behind pantry, office or kitchen doors. They have 6 or 8 compartments – depending on type – and work really well in family situations.

Containers can be made of metal, wood, plastic, fabric, cardboard, and leather just to name a few. Choose one that suits your needs, décor and preferences.

Are there any other things I can do to make my in-tray work for me?

Yes, have a **date stamp**, **stapler** and **pens/pencils/highlighter** close at hand.



- Get into the habit of **date stamping** all paper. Date stamp the **top right-hand corner** of sealed envelopes, sheets of paper, brochures, open mail, magazines etc – be manic and date stamp everything! By date stamping all your paperwork as it come into your in-tray you start to better manage your papers right from the start.



- **Staple sets of information together immediately.** You will always be confident that all pages of a set of information are held together forever!



- **Underline, highlight** or **circle** critical information as you read the contents of your in-tray. Use a pen, pencil or highlighter.

How should I go about dealing with the contents of my in-tray?

- When you attend to items in your in-tray you must **start at the top**
 - date stamp the top right hand corner of every item
 - if item is a bill, **circle, underline or highlight** the following:
amount due, date due, account number, payment details
 - if item is not a bill, **circle, underline or highlight** all important information
 - if item has more than one page **staple pages together**
- When you attend to an item
 - **it can never go back** into the in-tray (no such thing as the **too hard basket** any more – make a decision!)
 - **it must move forward** to the next location in the system (to be detailed in the following modules)
- You can stop at any time
 - but **you must deal with everything you have touched**

How often should I attend to my in-tray?

If you commit to **paying attention to your in-tray on a regular basis** the contents will never turn into a pile! Your in-tray should be empty for a lot of the time (even most of the time) – this is a sign that the system is working!

Some choices of how frequently you attend to your in-tray are:

- Daily = **ideal**
– but how realistic is this for YOU?
- 3-5 times a week = **great**
– do-able in most circumstances
- 2 times a week = **good**
– aim for this at least; it's realistic and do-able
- 1 time a week = **satisfactory**
– critical and an absolute minimum requirement

Use this table to select both the frequency and the day(s) you commit to attending to your in-tray - *just choose a column and tick the appropriate box(es)*

daily	3-5 days a week	2 days a week	1 day a week
<input type="checkbox"/> Monday	<input type="checkbox"/> Monday	<input type="checkbox"/> Monday	<input type="checkbox"/> Monday
<input type="checkbox"/> Tuesday	<input type="checkbox"/> Tuesday	<input type="checkbox"/> Tuesday	<input type="checkbox"/> Tuesday
<input type="checkbox"/> Wednesday	<input type="checkbox"/> Wednesday	<input type="checkbox"/> Wednesday	<input type="checkbox"/> Wednesday
<input type="checkbox"/> Thursday	<input type="checkbox"/> Thursday	<input type="checkbox"/> Thursday	<input type="checkbox"/> Thursday
<input type="checkbox"/> Friday	<input type="checkbox"/> Friday	<input type="checkbox"/> Friday	<input type="checkbox"/> Friday
<input type="checkbox"/> Saturday	<input type="checkbox"/> Saturday	<input type="checkbox"/> Saturday	<input type="checkbox"/> Saturday
<input type="checkbox"/> Sunday	<input type="checkbox"/> Sunday	<input type="checkbox"/> Sunday	<input type="checkbox"/> Sunday

How can I stay motivated and committed to emptying my in-tray?

In addition to **specifying days** to attend to your in-tray, you can also place a **motivator** on the bottom of your in-tray. When you empty your in-tray, the motivator will add a fun element to the process.

The motivator you place there should bring a **smile** to your face when you reach it. **It should be rewarding, inspiring and fun!** Try one of the following:

- A mirror – then - if you don't see your face at least once a week you know you have a pile on your hands
- A motivational quote, proverb or saying will remind you of a job well done
- A picture, photo or item you really love will inspire you to get to the bottom of your in-tray regularly
- Money or other reward (voucher etc) can be cashed in for those who need some retail therapy or pamper treatment

How do others manage their in-trays?

Peek at how other people manage their in-trays:

- Robert lives alone in an apartment and receives about 10-15 items a week. His décor is “uni-student” - a mix of family furniture and items purchased on e-bay. He has chosen a plastic in-tray purchased from K-mart and he has placed it on the kitchen bench. He has nominated Thursday (pay day) as his day to attend to his in-tray. His reward for getting to the bottom of his in-tray is \$20 which he uses on the weekend as extra drinking money.
- Richard and Carol live in a suburban house which is well set up with furniture and decorator items. They receive lots of mail as they have a variety of interests, some of which they share. They have chosen a wicker tray which they have placed on a hall table. Each deals with their own paperwork separately. Richard prefers to check the in-tray daily because he also handles the family finances and bills. Carol checks the in-tray daily too because she is naturally curious and wants to “know” what's going on. They decided to place a photo of their last holiday on the bottom of the tray as it was a very happy time for them and suits the painting on the wall nearby.
- Samantha and Greg have three children and lots going on every day. Samantha uses a drop-down file which hangs behind the pantry door.



Each family member has a pocket for all their incoming mail. When the children bring school paperwork home, they simply pop it into Samantha's pocket for her attention. Samantha manages the system and it works well for their family.

My in-tray system

question	action
I have placed my in-tray in the following location:	
I have placed my in-tray here because:	
I have chosen this type of in-tray because:	
I have committed these days to attending to my in-tray	<input type="checkbox"/> Monday <input type="checkbox"/> Tuesday <input type="checkbox"/> Wednesday <input type="checkbox"/> Thursday <input type="checkbox"/> Friday <input type="checkbox"/> Saturday <input type="checkbox"/> Sunday
This is the reward or inspiration I have placed at the bottom of my in-tray	
I have placed these items close to my in-tray	<input type="checkbox"/> Date stamp <input type="checkbox"/> Stapler <input type="checkbox"/> Pen, pencil, highlighter
I have informed the following people about the new in-tray system for our household	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
This is the person who holds ultimate responsibility for the management and maintenance of our in-tray system	

If you would like some accountability, you may submit this sheet to Paperclippo for review and feedback

Congratulations, you have completed module one, setting up your in-tray system.

The in-tray plays an **important functional role** and, if well set up, will serve you faithfully. If poorly managed, your in-tray can easily become just another receptacle for a pile of unattended, disorganised paperwork.

TIP

If you don't want to spend a lot of time organising your old backlog of paperwork, simply do this:

- Set up your in-tray as outlined in this module
- Go to any pile of your old paperwork and remove 8 pieces of paper
- Place these items into your in-tray and pretend they just came in!
- Deal with the items as you would your new paperwork
- Repeat as often as necessary

You have completed the following:

- Selected a location for your in-tray
- Selected a type of in-tray to suit your circumstances
- You have located your tools (stapler, date stamp and pen/highlighter) close to your in-tray
- You have set up a schedule for attending to your in-tray
- You have set up a reward/motivation system to keep you on track
- You have let other people know about the system
- You have taken responsibility for this important step in your system

Next step is:

- Move onto module two – dealing with ACTION PAPERWORK
- Keep up the good work!