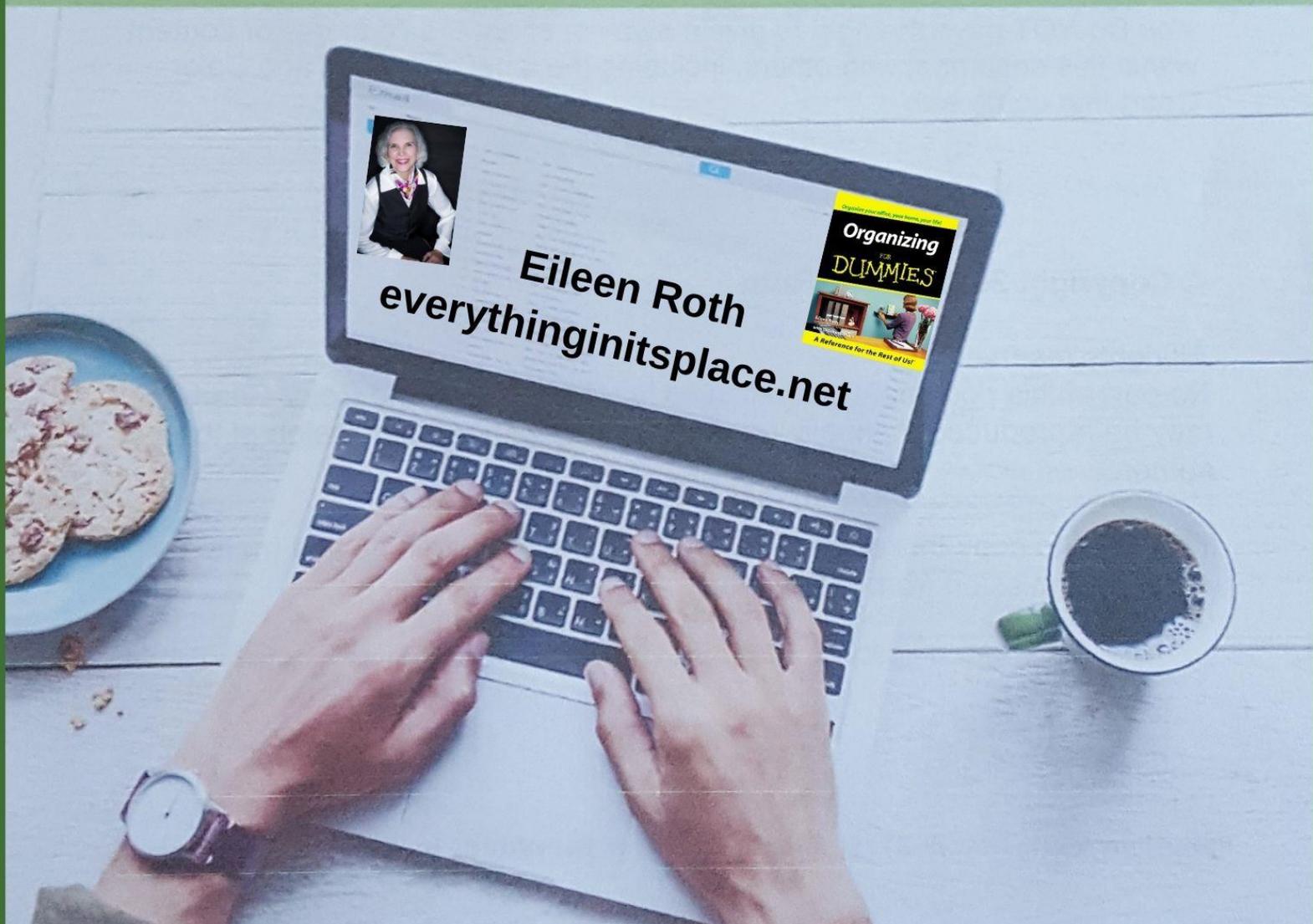




Take Action File System

for mail and email

Easily find your Action Items



Take Action File™ System

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Take Action File™ System

Intro

I always took care of mail easily at home, but the mail at my desk was always overloaded because of the different responsibilities I had. For most of my office jobs, I worked for more than one executive as their administrative assistant. Even as Office Manager, I had different responsibilities which meant different types of mail came in from meetings to resumes to safety to building information.

I tried the 1-31 days method for a tickler system, (tickles your memory), but every time I did not do something on that day, papers just moved to the next day, and the next day, until some items moved 3-5 times. And if someone called on the phone, I no longer knew what day that item was in. I was wasting time trying to find what I wanted, when I wanted it.

One day I decided that filing action information by category and using the To Do List for what I was working on that day was going to work better. I tried various categories, and finally decided on action verbs as the best way.

I won't even tell you how many times I changed the Color Code for the paper mail system until I found just the right combination to file the folders and never have two folders of the same cut or color next to each other (except for To Pay and to Purchase in green for money.) So I highly recommend following the included Color Chart. It's a big timesaver.

These directions begin with how to quickly sort your mail, and then an explanation of the Take Action File system. Even though you might not do a paper mail system, read through it before you jump to the Email Setup. It will help you understand the system as well as the pictures in the mail setup. It's really a simple system once you start using it.

This is a digital download. There are templates here to print on file folder labels and tab labels. If you don't want to create your own labels for a paper mail system, pre-printed labels are sold separately.

So are systems for Middle School/High school OR college students. Those systems include 3 sets of labels : the Take Action File + school + personal labels.

If you're ready to save time processing your mail, take action and jump in.

Take Action File™ System

Process Your Mail

Mail arrives at your office and it needs to land somewhere. Some office people retrieve their mail from a central location, carry it back to their desk, and drop the mail anywhere in their office because they don't have time to process it right at that moment.

In a home or home office, some people drop their mail on their kitchen counters or an entryway table until they are ready to process it.

Dropping the mail anywhere can become quite a clutter problem as it piles up. If you can't process your mail when you get it, the mail needs an IN BOX. Horizontal stacking trays work well for both an IN BOX and an OUT BOX, and you can add a third tier to hold printer paper.



Create IN and OUT BOXes with horizontal stacking trays

or use wall pockets that hang outside of the office or over a cubicle wall.

If your cubicle has no outside wall, hang the wall pockets on the wall farthest from your main work area, but closest to an entrance for mail delivery by a mail person or co-worker.

IN BOX

Too many people open their mail, glance at it, and put it right back into their IN BOX to deal with later.

**“It’s an IN BOX, not a holding tank.
Once it’s out, it’s Out.”**

Don't return mail to your IN BOX. That creates clutter. Instead set specific times to open your mail when you have time to process it into the Take Action File system.

Take Action File™ System

Sorting Paper Mail with R.A.P.I.D.™

This first system is to help you sort the mail before it goes into the Take Action File™ system.

After you take your mail out of your mailbox, sit down at a desk with a recycling bin nearby. The first thing you want to do is just a fast sort.

Don't open anything yet. You will just sort by the return address on the envelope or mailing label. Follow this 5-step sort – R.A.P.I.D.™ to rapidly sort your mail into these action categories.

R **Read**

A **Attend**

P **Pay**

I **Important**

D **Dump**

Read through all of these 5 categories so you understand them.

It's usually easiest to make four stacks on your desk. Read, Attend, Pay, and Important. (*Dump is going right into the trash and doesn't need a stack.*)

Start with the READ items as they are usually large and at the bottom of your mail.

Then you can go through all other envelopes and put them into the 4 stacks or Dump it into recycling.

Take Action File™ System

The R. A. P. I. D.™ system

READ

Most of your Read section is usually at the bottom of your mail because they are often larger items like magazines or catalogs. In an office environment thicker reports will be at the bottom too. If you're not sure if it's To Read, put them in the Important group for now. Later you will determine where they go in the Take Action File .

ATTEND

As you glance through the envelopes, you will recognize some return addresses as meeting notice that would come from an organization like the Chamber of Commerce, a networking group, or a club. Whatever you quickly recognize as a meeting notice, add to this group.

PAY

This category will be for any envelopes you recognize as a bill. Put those into this group.

IMPORTANT

This category is anything you don't recognize and so it will be considered Important until you open it and determine if it really is Important or not. If it is just advertising or junk mail, it gets recycled. It's like the saying "*Not guilty until proven guilty.*" It's not junk until proven it's junk.

If a piece of mail is not actually important, it's just information; that's okay. It's still considered Important because it doesn't fall in any other category. Reports can be handled here, as you will decide where it goes inside the Take Action File.

DUMP

You don't need a group here. As the name of this category says, just dump this mail right into the recycling bin. Hopefully you are opening your mail next to one. If you have a shredder, you can shred documents with any specific information about you on them.

Take Action File™ System

Now it's time to handle each group.

Begin with the Read group and put reading material into magazine holders. Label two magazine holders: **Catalogs** and **To Read**

Catalogs: Use a permanent marker and near the top right of the catalog cover, write the month and year with 2 digits each like this: Month/Year. Write in the same place unless you have a black catalog cover and need to write on a part that has some color.



Now you know how old a catalog is without searching all over the cover or spine to find the date or season. The date also makes it easier to replace catalogs as new ones come in when you easily see the date on each issue.

To Read: This container will hold bulky reading material like magazines and journals. When you have time, read thru the Table of Contents and remove the articles you want to save. (Keep thin newsletters and documents in the To Read stack and they will go into the Take Action File.)

Finish the Sort into the Take Action File system

Next take any group, open the envelopes, read the information and place the items directly into the appropriate action category into the Take Action File system, your permanent file system, or the recycling bin.

You will want to have the system up first.

Sorting Email

Email arrives in your IN BOX in date order.

Hopefully, your junk email filters out the actual junk mail. However, you still need to review the junk email folder to determine if email you want to see landed in there. Once you remove the good email and put it back into the IN BOX, you can easily delete the emails in the junk mail folder.

We will continue with email setup after you are familiar with what is in the Take Action File System so you can understand how to set it up in your email system.

Take Action File™ System

What is a Take Action File™?

The Take Action File™ is a tickler system.

It is a system to remind you, or “tickle” your memory, that you have something to do or take action on.

As you process your "to do" items, mail, or email, you will have a system to place those items you need to act on but cannot take action on right now.

Instead of piling papers on your desk or leaving them in your IN BOX; the Take Action File System helps you categorize them into action items.

Create a Take Action File in your email too. Change the name to “Action Files” (drop the “Take”) with the categories as subfiles under Action Files to keep the entire group in the beginning of your email IN BOX. You may not use all of the categories in email.

Components

Here is a brief description of the Take Action File components.

The first 11 categories are for the **Current Month:**

These names are comprised of verbs: “To + a verb” since these are things you need to do.

The next category is the **File Index:**

This is a list of your permanent paper files.

When you open the mail or want to file information, your File Index will be easily accessible to see what files you have. You do not need a File Index of your computer files. (easy to see.)

The last category is the future **12 Months:**

Everything that does not need action in the current month is filed in the 12 Months category.

Take Action File™ System

File Names

Current Month

To Attend
To Call
 Will Call Back*
To Copy
To Discuss
To Do
 Wait for Info*
To Enter
To Pay
To Purchase
 Hold Until Received*
To Read
To Travel
To Write

File Index

12 Months

Jan - Mar
Apr - Jun
Jul - Sep
Oct - Dec

** The 3 Indented file names with * are secondary files (optional).
See descriptions for an explanation of each one.*

Take Action File™ System

How to Use the Take Action File™

Main Categories

The first 11 categories are for the **current** month. File all mail or email in the action category representing the **first action** you need to take.

For example:

Before you attend an event, you probably have to RSVP.

So the first action you need to take is one of these three:

To Call, To Pay, or To Write -- It is **not To Attend**.

Secondary Files (sub-files)

Mail: The basis of the paper mail system is for one file in a corresponding hanging file for each of the action categories.

A second file folder may appear in 3 other categories in the same hanging file.

Will Call Back	in	To Call
Wait for Info	in	To Do
Hold Until Received	in	To Purchase

Place the secondary file folders behind the main category file folder inside the hanging file with the same name. So the file folders of **To Call** and **To Call – Will Call Back** are both in a hanging file with a tab of **To Call**.

Email: The 3 Secondary files will become a third level in email and are optional. Ex: **Will Call Back** will be a subcategory folder under **To Call**.
(Sometimes you want someone to call you vs. an email reply.)

To Discuss

This category will contain file names inside this category as sub-files for the key people or departments you constantly contact.

(see description of *To Discuss*)

Take Action File™ System

Take Action File™ Categories

Always place items in the category that represents the:

very **first action** you have to take.

Each category can hold:

Specific items that constitute backup information for that action like an email, letter, flyer, meeting notice, article, report, spreadsheet, or other document

Lists of people, places, or action steps to take.

To Attend

When you receive a flyer or meeting notice, determine if you are going to go to the event. If you have decided to attend it, mark the event date and time in your calendar and file the flyer, meeting notice, or invitation in the “**first action**” you need to take.

For example:

Before you attend an event, you probably have to RSVP. So the first action you need to take is **To Call, To Pay, or To Write**. Put the invitation or flyer into one of those three files.

Only *after* that action is completed will it move into **To Attend** – if the event occurs **this** month.

After you have RSVP'd, file it in the **12 Months** category if it falls in a different month.

File paper items in this category **chronologically** (by date) so the earliest, or next, event is always on top. Remember to also mark the event in your calendar. Once the event is over, toss (recycle) the flyer, invitation, or email. There is no reason to save it, unless it is a special memory.

Take Action File™ System

Want to wait to decide if you are going?

Imagine you receive an event notice for something a few months away. If you want to wait to determine if you will attend the event, file the notice in the month of the early registration deadline in the **12 Months** section.

If there is no early deadline, file it at least one month before the event so you can review it and have time to make travel arrangements. Mark it in your calendar to save the date.

Why save the notice?

You may think you do not need the notice at all because the date and time are in your calendar. However, there are good reasons to save it.

The notice, flyer, or invitation may have more information than beginning and ending times. The meeting notice tells you about the meeting. It often gives you an agenda with timing, a speaker bio, and the topic description.

<i>Example:</i>	XYZ Meeting Notice
	11 am Networking
	12 pm Lunch
	1 pm Speaker (topic description follows)

This information allows you to make 3 different decisions:

1. **Skip the meeting:** Reading the topic description might let you decide to skip the entire meeting if it isn't important enough.
2. **Skip Network Time:** If you want to attend the meeting but need to save time, you could skip networking, show up for lunch, and save an hour.
3. **Skip Network and Lunch Time:** If you really need to save time, you could skip both networking and lunch and just show up for the speaker; thereby saving you two hours of time.

So it really is worth saving meeting notices to determine what your priorities **truly are** for that day.

Reminders: Another reason to save the flyer or email is to remind you of an annual event, especially if you are not on a mailing list to receive a notice of the event. In that case, place the flyer in the appropriate

Take Action File™ System

12 Months file for next year after this year's event is over.

For example, we know various model train clubs have swap meets and clinics the same time every year. We do not belong to the clubs, so previous flyers remind us to check dates for this year's events.

To Call

This category is for items that necessitate a phone call. It may consist of:

Loose messages: Most phone message pads become single pieces of paper that are often lost in the midst of other papers on the desktop. One way to corral those messages is to put them into **To Call** and remove them after you have spoken with that person.

Lists: You may want to just keep a running list of people or places to call. If you keep these on one list, skip a space or two between entries. For lengthy lists, organize separate lists by project, people, or personal calls.

Documents: You can place any backup documents you might need to review before or during a telephone conversation into this file. However, do **not** put an entire project file in here - just pull relevant documents. If you need an entire project file, put the name of the person on a phone list with a note next to that person's name to pull the project file before calling.

Emails: In your email program **To Call** will hold emails that necessitate a phone call instead of an email reply.

Will Call Back - Add this second file in **To Call** to hold information when you placed a call and are waiting for someone to call you back.

To Copy

This file is helpful for people who print bulk copies somewhere else - whether a machine is somewhere else in the office or you need to drive to a copy store.

Take Action File™ System

Even if you just have to walk across the office to copy documents, this file saves time by keeping all material in one place so you can copy several documents at the same time.

***Tip:** Mark in pencil in the same corner - left or right – who the copies are for, not just the number of copies. When you only use a number, like 3, you may forget to whom you wanted to send the 3 copies.*

Save time when you distribute the copies by just putting a check mark next to the name of the person receiving the document.. If you use pencil, you can easily erase the names, if you need to.

To Discuss

Ever talk to someone and 30 minutes later remember you wanted to discuss something else? This file is for items to discuss with other people. It could be one file or separate files. This is a good place to list projects that are delegated too.

The important thing to remember is that you do **not** want to have a list or a file for everyone you know. This is just for key contacts. These are probably people you discuss things with daily or weekly.

For example, you might have lists or files for these people:
Your Manager, Key Staff, Key Dept. Heads.

This could also have a file called **To Discuss with Vendors**. Inside would be lists for each vendor. i.e. To Discuss with Accountant, Printer, Marketing Company, Distributor, etc.

One File: Create a separate list for each key contact to be more organized. Then you do not have to search through one long list of items that apply to other people.

Separate Files: If you have too many documents that need action in these files, you may want separate files for each key person or group with whom you will have many discussion items at one time.

Take Action File™ System

Keep documents to a minimum to prevent files from becoming too full. Only pull the main item or part of a document that you need, i.e. a chart. This will still get very full if you have many items to discuss with one person. In that case you may have to rely on a list and pull the files/project when it is time to discuss those items with the person.

File Names

Business contacts: It is better to use file name with job titles or type of business rather than personal or business names. Then you do not have to change file names when people change position or you change vendors.

Examples:

To Discuss with Accounting Director vs. Charles Brown.
To Discuss with Printer vs. XYZ Printing.

Personal contacts: File names may include:

To Discuss with Family
To Discuss with Friends
To Discuss with Service People

Inside each would be individual lists or documents per person or company.

*I actually started this idea when I was in college.
My parents called every Sunday, and I would make
a list of items to discuss with them before the Sunday call.*

Extra labels

You can add **To Discuss** files, however limit these to key contacts – people you discuss things with daily or weekly. The paper version includes six To Discuss files, otherwise you will need another package of file folders.

Do **NOT** make files for everyone you talk to!
You can make 1 file name called Other
for people or companies not in the other five groups.

Take Action File™ System

To Do

This category holds items that do not fall in any of the other categories for the current month.

Examples might be:

- Research information
- Examine data or charts
- List of action steps or information for a project
- To Do List

You may decide to keep small projects in here and open separate project files for larger projects.

Tip: Keep just the part of the project you are working on, not the entire file.

Wait for Info - Add this second file in **To Do**. This could hold different types of information:

- List of people from whom you requested information
- Forms you sent out asking for information
- Documents that need more information from someone else

To Enter

This category holds items to be entered into the computer or a different program. It may hold data:

- To enter an event, address, or financial information
- To create a spreadsheet, chart, table, or presentation

Email: To Enter contains information to be entered into other programs like a database, spreadsheet, calendar, power point presentation, contact management program or financial program.

Examples: addresses, appointments, financial data, etc.

Take Action File™ System

To Pay

As you can guess, this category holds physical copies of bills to pay by mail or online.

Save time by paying bills in a batch instead of writing and recording checks, or filling out Check Requests, one at a time. Choose the same day(s) each week to pay your bills and establish a routine: ie. every Friday.

Choose once or twice a week to pay bills at work.

Choose once a week or twice a month to pay bills at home.

If a bill cannot be paid at your scheduled bill paying session, it stays in the **To Pay** category until the next scheduled session.

***Tip:** It wastes time and is easier to be late when you are “waiting for the right day” to pay a bill or mail it. Paying regularly prevents late payments which saves late fees and penalties, and you still pay every 30 days.*

To Purchase

This category holds items you intend to order now, **not** someday. Since this category is closely related to the **To Pay** category, you may choose to process both of them at the same time. Similar to paying bills, if you do not intend to purchase an item in the current session, leave it in the category until the next session.

If several months go by and you have not yet ordered the item, move it to a file in your general system.

Hold Until Received - Add this second file in **To Purchase** for those items you ordered by phone or online and are waiting to receive them. Remember to remove these reminders once the item is received.

This has happened to me several times and reminded me when I did not receive an item I had pre-ordered before it was created (like a recording or a pre-book launch).

Take Action File™ System

To Read

Put small documents like reports, newsletters, and articles from magazines in this category until you read them. Documents should be small, about 1- 10 pages.

Keep complete magazines in magazine holders until you review the table of contents and remove the articles you want to read. Don't forget to capture "continued on page 64," "page 82", "page 112," etc.

Email: You may want to have sub-files for various newsletters or people who send you information to read on a regular basis, i.e. weekly or monthly newsletters. Then you can read information from the same person all at once.

Tip: Unsubscribe from those people or groups you no longer read.

To Travel

Place your tickets, reservations, itinerary, train or bus schedules, and directions in this section if they occur this month. If your reservations occur in a future month, place the reservations in the appropriate **12 Months** category. This will prevent looking at the wrong reservations.

If you have several trips for the current month, you may find it convenient to use separate file folders for each trip or paper clip these items together: plane tickets, boarding passes, hotel reservations, car rental confirmations, event agenda, and other tickets or meeting information.

Email: Create separate file names for each trip to prevent confusion.

Tip: Put a reminder on your appointment calendar to check in online to retrieve boarding passes 24 hours in advance.

To Write

This file holds information that needs a written response. It may hold information you have compiled to write a document, report, or presentation.

Take Action File™ System

It could be just a list of people you need to write to, or it could be a list of articles or reports you need to write. If you are writing a book or ebook, keep it in the regular files.

Adding Categories

If you choose to add a category or label, use this font to match the other labels for the file folders and tabs:

Labels: Arial Font Size 14 Bold (Arial Black is too wide)

Avery File Folder Labels #5366 (laser and inkjet)

Avery Return Address Labels #5167 for the tabs (8167 for inkjet)

File Index

Create a list in a table or spreadsheet of your general paper file system. Print the list and keep the list here for a quick filing reference.

As you look at documents or open mail, you will find it convenient to review the **File Index**. You will see the names of files you already have so you can easily decide where to file new documents or if you need to make a new file. This also prevents duplicate files from being created.

12 Months

If there is no further action to take during the current month, place information that still needs future action in the appropriate **12 Months** file.

Then 2-3 days before the end of the current month, take items from the next month and sort them into the separate action categories.

You can probably store items for future action in just 4 quarterly files labeled with 3 months each:

Jan-Feb-Mar
Apr-May-Jun

Jul-Aug-Sept
Oct-Nov-Dec

If these files get too full, separate them into 12 individual monthly files.

Basic Tools to Setup a Physical File System

Note to Email users:

if you are not also making a paper file system, you can skip to the Email setup. However, you will understand it better if you at least look at the pictures here.

The paper Take Action File system will consist of 3 items: the hanging file, the hanging file tab and poly file folders. Below are specific tips to help you design your system.

Hanging Files

The hanging files hold file folders *inside* of them. Hanging files are usually forest green files (see *Color*) with metal bars that hang on rods or built-in bars. inside file drawers and cabinets.

When the hanging files *remain* in the file system, they act as your *place holder*. When you remove an inside file folder, the hanging file is still there to hold the place and show you where to put the file folder back.

Reinforced hanging files are recommended for their clear reinforced edges on the top and the bottom of the hanging file. This gives you extra strength for the hanging file. (*Pendaflex®* or *Staples®* brands).

Hanging File Tabs

Use hanging file tabs on the hanging files. The tabs are your *guide* to find the hanging file you want. (see *Color*)

Tab Labels:

1. Place the *short* labels on the white card inserts that come with a package of hanging file tabs. There is a tear strip *and* a fold line for each individual tab insert card. Place each label *above* the fold line, for each individual tab card insert. The labels are in alphabetical order, reading *across* from left to right. (*It may help you to tear off the very small top and bottom ends of each full (10 cards) insert sheet before starting to label.*)

Take Action File™ System

2. Separate the tab inserts. Fold the small part of the tab card insert **below** the fold line to the back of the card.
3. Place the card insert with the label on it inside a plastic hanging file tab, with the **front** of the plastic tab leaning *to the back* or *away*.

Notice how the bottom (folded part) of the card insert comes forward and pushes the top of the card insert to lean back – matching the lean of the plastic hanging file tab.

4. Next place one tab on the **front** of each hanging file in a zig zag pattern. (*If you put the tabs in one straight line, you will have tabs hidden by the ones directly in front of them.*)

Zig zag: Notice how the words “Start,” “Put”, and “Then” form the zig zag pattern in the three sentences below.

Start on the left side.

Put the next one to the right of the left side one.

Then return to the left side and repeat the pattern

You can see each of the tabs in the picture below because they are in zig zag formation.



Tab for the 12 Months:

Put the **12 Months** tab on the front of one hanging file. Put the 4 folders for the 12 months inside the hanging file. (*You can change to 4 hanging files or even 12 monthly file folders if you have too much information per month.*)

Take Action File™ System

File Folders

Type:

These files will be handled constantly. Use 1/3 cut letter size file folders: 3 file tabs across in left, center and right positions. Use:

Poly / plastic file folders or reinforced (2-ply) paper file folders.

Poly/plastic file folders will last even longer than paper file folders. Since you will be handling your action files frequently, if not daily, these are highly recommended.

Reinforced file folders have a second layer across the top of the file folder – which is where you usually handle the file folder. So it will last longer than regular file folders.

Labels:

Place the **long** file labels on the file folders, often **alternating** left, center, and right folders. (see *Color Chart for position*).

The labels are **alphabetical**, reading **across**. (Do NOT GO DOWN)

If you use colored files, leave a drop of file color showing on top to form a border around the entire white file label, like a picture frame.

Color

Color allows you to easily find files faster in your paper file system.



1. **One Color:** If you use just one color for the entire Take Action File system, red tabs and red file folders are suggested as red indicates “hot” or “important.” (see *Hanging File color below*)
2. **Two Colors:** You could use one main color (red) and change the color of just the **12 Months** tab and files (blue). (see *previous page*)
3. **Color Variety:** You can use a variety of colored file folders and tabs, i.e., red, blue, green and yellow. Just **match** the color of the hanging file **tabs** with the color of the **file folders**. Orange and purple are harder to find. (Use *standard forest green reinforced hanging files.*)

Take Action File™ System

Hanging Files:

Colored tabs and file folders stand out against the hanging files if you choose the **standard green (forest green)** hanging files.

It is not necessary to use colored hanging files. In fact putting a colored file folder inside the same color hanging file makes it **harder** to see the file folder.

Hanging File Tabs:

The hanging file tabs are your **guide** to find the hanging file you want. Hanging files usually come with a package of clear plastic hanging file tabs. You can use the clear tabs; however, it is **easier** to spot colored hanging file tabs on a standard forest green hanging file.

Most packages of hanging file tabs are sold as 25 tabs of one color and come in either 1/3 cut (3 1/2 inches) or 1/5 cut (2 inches). 1/5 cut tabs are shorter and recommended for this small system. *(Longer 1/3 cut tabs are used for your general file system.)*

File Folders:

Choose one color or a variety of colors for file folders instead of manila. Manila folders, especially with clear tabs, will be a sea of “bland.”

Poly/Plastic Files: There are *clear* poly files with colored tabs or solid colored poly files. If you do not like to see the contents through the file folder, buy solid colored files --usually just red, blue, green and yellow. *(Sometimes you can find orange or purple online.)*

Do **NOT** alternate colors *within* a category except for **To Discuss** and the **12 Months**. Changing colors makes finding files fast and easy in these two categories.

To Discuss with Accounting is in blue
To Discuss with Marketing is in red

Jan-Feb-Mar in blue Apr-May-June in yellow
July-Aug-Sep in red Oct-Nov-Dec in green

Take Action File™ System

Email Setup

As you open your emails, determine if the email is an **action item**. If your reply will take only a few minutes, reply when you open the email. If you need to wait to act on the email, you can move it into one of the 11 action categories, based on the very **next action** you need to take.

Setup your Take Action Files

1. In your IN BOX on your email program, create a yellow file folder called ACTION FILES. (Dropping the word “Take” puts the Action Files near the top alphabetically instead of down at “T”.)
2. Within the Action Files folder, setup subfolders for each of the 11 action categories: **To Attend, To Call**, etc.
3. Three of the 11 action categories will have subfolders:
 - **Will Call Back** under **To Call**
 - **Wait for Info** under **To Do** and
 - **Hold Until Received** under **To Purchase**.

You will therefore need subfolders within the subfolders, a third level.

Every day review the Spam Folder first and move any “good” emails that are not spam into the IN BOX. Then delete the emails in the spam folder.

As you read through the emails in your IN BOX, delete the ones you don’t need because you either already know the information or it is a duplication of someone else’s email, like these:

Emails that say “*We will be closed Monday for the holiday.*”

Reminder notices for meetings that are in your calendar.

The same email from several people – especially promotional pitches from 5 to 10 people who are affiliates.

It’s so easy to search for emails today, that you don’t really need to sort all of your emails into the Take Action File System. However, there are some emails that could be separated out. It’s your choice.

How to use the Action Files in email

Note: This information is based on MS Outlook system.

To Attend

In Outlook, even though you attach an email to a calendar item, it's still an email in the IN BOX. Move those emails into **To Attend** so you can find them easily as a backup to the calendar.

At the end of the day or week, delete past events from **To Attend** which deletes it from the IN BOX, but not the Outlook calendar.

To Call

Move emails relating to a phone call you want to make into this category and return calls you are expecting into **To Call – Will Call Back**.

To Copy

This file is helpful for people who print bulk copies somewhere else - whether a machine is somewhere else in the office or you need to drive to a copy store.

To Discuss

If there's something To Discuss with someone, move the emails in here to find them quickly. Limit the file names to key people or departments you talk to often. You do not want a file for everyone who writes you.
(see file name examples on pgs. 12-13.)

To Do

This file is for emails that affects things you need to do.

If items are for a project, you may want to open project files by project name and keep them separate.

To Enter

Move emails with data that needs to be entered into a spreadsheet, database, or contact list here.

Take Action File™ System

To Pay

Any email bills would go in here.

To Purchase

If there is information about an item you want to consider purchasing, move it into To Purchase. If you purchased it and didn't receive it, move it into **To Purchase – Hold**. (third level)

I didn't receive audio recordings from Mark Victor Hansen's office, and they had trouble finding my order. I looked in my Purchase-Hold file, and sent them my Purchase Order. It didn't sound like they could have found it without my information. It was never sent out.

To Read

Lengthy emails or reports could go here. If the document or ebook is downloaded it could be on the hard drive in a file. Don't count all emails as something to read. They are better off staying in your IN BOX.

To Travel

All travel confirmations would be in here, probably with subfiles named by date and trip name.

To Write

Put any email that needs a response or includes information for an article, blog post, social media or presentation in here. It could also contain a list of ideas for blog posts, articles or social media.

12 Months

This keeps information you are not using in the current month. You may want to setup quarterly or monthly files here, and possibly a file for next year. Once emails affect the current month, move them into the Take Action File system.

Project Files

Emails about projects could go in several places. Create a Project Files category with subcategories by project name instead of separating emails into different action file categories.

Take Action File™ System

Take Action File Summary

Moving items out of your IN BOX and into a Take Action File system allows you to really see what you need to act on. Setup similar Take Action Files for your mail and email.

Move information from **IN** to **Take Action**.
and
Act on the information in your **Take Action Files**.

Paper Take Action File™ System

Included:

- **Color Chart** for file folders – shows color and position!
- **Label Templates** for both File Folders and Tabs

To create or add labels for file folders or tabs, use the size below to match.

Labels: Arial Font Size 14 Bold (Arial Black is too wide)

Order pre-printed labels if you don't want to create them yourself.

Order here:

Student versions include school system files – sold separately

Take Action Files + Middle School / High School system + personal

Order here:

Take Action Files + College system + personal

Order here:

**Get organized.
and enjoy more free time.**

For more time-savers for office or home, visit:

[https:// everythinginitsplace.net](https://everythinginitsplace.net)

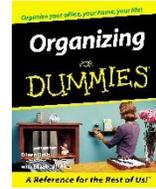
Take Action File™ System



Everything in its Place®



Eileen Roth *Your Organizing Tour Guide*



As the author of *Organizing For Dummies*®, Eileen Roth demonstrates how to be more productive, reduce your stress, and save time and money. Eileen named her company Everything in its Place® because she truly believes that you can find a place for everything.

Eileen is a national speaker, trainer and productivity expert in the areas of:

Office Organization
Time Management

Home Organization
Student Organization

She helps people learn how to put everything in its P.L.A.C.E.™ This reduces stress and people find things WHEN they need them. In fact Eileen Roth's organizing principles are simple to remember, easy to implement, and maintenance is minutes a day to stay that way.

Eileen Roth's background stems from over 15 years in office and association administration. Clients include corporations, associations, and research facilities such as: Altschuler, Melvoin & Glasser, Argonne National Labs, Northwest Airlines, the Paper Industry Manufacturer's Association, Wisconsin Bankers Association, TAP Pharmaceuticals, and ABA-New England.

Major National Media

Today Show
Oprah
Woman's Day
Men's Health
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ASTD's Training & Development (ATD)
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