



neat

# Tame Your Paper Monster™

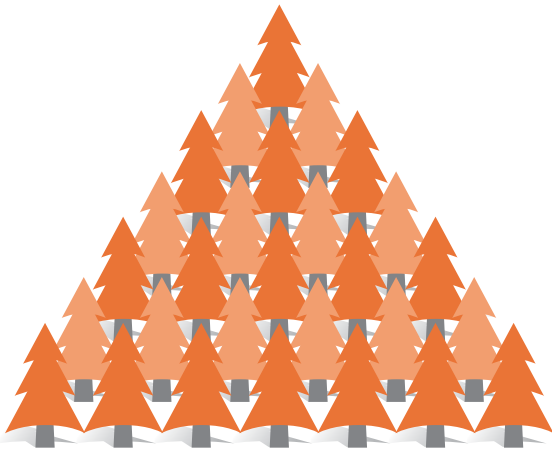
A simple guide to getting rid of paper clutter and creating a little peace of mind.

# Paper, Paper Everywhere

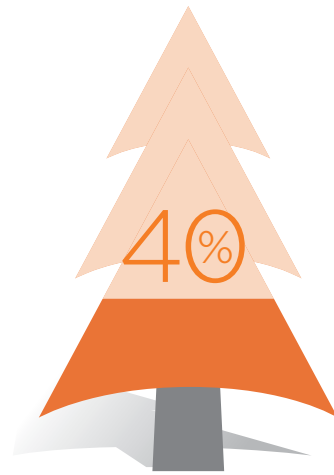
It's amazing when we take a moment to recognize what a paper-filled world we live in and how much paper is such a part of everyday life; whether at home or in the workplace\*:

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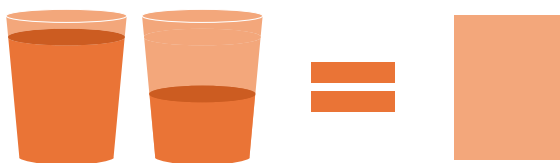
U.S. & Canadian businesses generate over 1 trillion new pieces of paper each year.



In 2009 the U.S. used 10 million tons of office paper. That's the equivalent of 178 million trees.



Over 40% of wood pulp goes toward the production of paper.



It takes more than 1.5 cups of water to make one sheet of paper.



80% of today's information is still paper-based.

\* Coopers and Lybrand

# What is a Paper Monster?

A Paper Monster is all the paper clutter in your life. And everybody's clutter is different. Some look like big clumps of business cards in a desk drawer. Others are huge piles of receipts in shoeboxes or jammed into a purse or wallet. While still others are mounds of documents covering your desk.

And chances are you have a Paper Monster somewhere, maybe everywhere. Maybe it's hidden in a bank of filing cabinets in your office or hiding in a storage bin in your garage. It could be lurking in your purse, wallet or car or it might be right out in the open, covering your desk and bookshelves.

Regardless of what your Paper Monster is made of or where it dwells, one thing is certain - Paper Monsters have no regard for a person's peace of mind. They create chaos, untidiness, and overall anxiety and their behavior creates havoc at work, at home, and on the road. Paper enters your life on a daily basis, which means the Paper Monster can't be far behind.

## Signs you may have a Paper Monster:

### SIGN NUMBER ONE

You often lose important receipts and business cards.

### SIGN NUMBER TWO

You wasted 45 minutes searching for a document, only to find it hidden inside a foot-tall pile of random paper

### SIGN NUMBER THREE

You can't see your desk.

### SIGN NUMBER FOUR

You're too scared to open your filing cabinet drawers.



# Time To Tame Your Paper Monster

At the Neat Company, we have devised a simple plan to help you defeat your Paper Monster once and for all. The tactics and expert advice in this guide will lead you to a paper-LESS and clutter-free life!



## The Steps to Taming Your Paper Monster

### 1 Getting Organized

Smaller Steps for success

### 2 Going Paper-LESS

Confronting the paper problem

### 3 Creating a Digital Filing Cabinet

Transitioning to digital storage

### 4 Digital Road Rules

Saving important files

### 5 Productivity & Peace of Mind

Action plan leading to success

GET STARTED!



# STEP 1: GETTING ORGANIZED

There's a common misconception that getting organized takes a lot of time and effort. However, in most instances it won't take as long as you think. The key is to come up with a plan that will enable you to tackle a little bit each day.<sup>(1)</sup> Block out time each day (even if it's just 15 minutes) and stick with the plan.<sup>(2)</sup> So start small and follow the tactics below to get organized.

“getting organized . . . won't take as long as you think.”

## Break It Down

Breaking organization tasks into smaller, more achievable steps will allow you to succeed without becoming overwhelmed. Focus on one room at a time as this will enable you to concentrate your efforts and see faster results.

## Do A Paper Audit

Go through your paper and get rid of whatever you don't need. Remember: if you haven't looked at it in 6 months, chances are you can get rid of it, or at least archive it somewhere out of the way.<sup>(3)</sup> If you don't need the physical copy, scan it and recycle it. You'll end up with less clutter and the recycling gods will be pleased.

## Determine How You Use Paper

Then look at everything you have left and set up your filing system (analog or digital) based on how you use your paper and information. Use categories and solutions that fit your work style and needs. For instance, maybe it makes more sense to organize by client, rather than by month.

## Make Space

Make room for every type of document you need to retain. If you don't have a designated place for things in the beginning, that's when you start putting things off until later - much later. A “miscellaneous” pile is the birthplace of a messy office or home.

## Create A Daily Routine

Keep in mind that Rome wasn't built in a day. Set aside a finite amount of time (whether it's 15 minutes or 30 minutes each day), set your timer and get your organizational groove on. If you do a little bit each day, you'll find it's less stressful and you'll soon be in maintenance mode versus overwhelmed mode. The daily routine will also soon become a habit and you'll be less likely to slide backwards.<sup>(4)</sup>

# STEP 2: GO PAPER-LESS

It's time to say goodbye to wasted time and hello to getting things done. It's time for paper-LESS. Going paper-LESS means getting organized, saving time and money and creating a better environment.

## “Paper-LESS” doesn't mean avoiding paper entirely

The idea of going “paper-LESS” focuses on keeping less paper, while “paperless” is about giving up on paper entirely. Behold, the power of the hyphen. The goal is becoming more organized and getting more out of your work while spending less effort. Paper-LESS is about all the benefits that come with increased efficiency – like peace of mind (yes, there is such a thing for small business owners, office workers and those of you defeating the paper monster at home).

## Why go paper-LESS?

Retaining less paper is an easy way to get more out of your workday. How? Think of all the paper you hold onto that you don't touch again until you throw it out months later. Think of all the time you spend hunting for information. Think of all the stressful clutter. Think of all the things you could do to help your business instead of struggling with paper. Whether you're compulsively neat or just aspiring for less clutter, whether you have 1 employee or 25 employees, retaining less paper can help you become better organized and reap the benefits.

## The benefits of paper-LESS

And that's why more and more people are taking steps to organize and simplify; benefitting their business in the process. For instance, real estate educator and author Butch Grimes switched to a paper-LESS organizational system a few years ago, and he loves the results. “It's all about me being happy. I can think better and make more money rather than being inundated with ‘do you know where this document is’ and whatnot.” Sound like something you'd be interested in? Getting better organized is easier than you think.

	PHYSICAL PAPER (without Neat)	DIGITAL FILES (with Neat)
Reduce clutter at work and at home	-	✓
Search by keyword	-	✓
Store electronically to save physical space	-	✓
Click to export data to Outlook®, Excel®, QuickBooks®, TurboTax®, etc.	-	✓
Create your own searchable contact database	-	✓
Create searchable PDF files	-	✓
Edit text using copy/paste	-	✓
Build a fort that defends with the power of papercuts	✓	-

# STEP 3: CREATE A DIGITAL FILING CABINET

Imagine the in-box that sits on your desk brimming with paper; perhaps your to-do list is on top. Now imagine replacing that in-box with a great software and scanner—it's slender, it's portable, and it takes up less space on your desk than the in-box did.

## Select Important Documents to Scan

To create a digital filing cabinet, first select the documents you'd like to scan. Some obvious examples might be receipts, invoices, or business cards. You could also scan in just about any piece of paper, including recipes, magazine articles, warranties, report cards, schoolwork, etc.

## Back-Up Files

Be sure to back up your digital files online or onto an external hard drive or CD-ROM/DVD and store in a safe place. Once you are ready to dispose of the paper files, you can shred any sensitive documents & recycle the rest.

## Mirror filing system

It's also a good idea to set up a mirror filing system—one that matches your digital filing system—for all documents you need in hard copy form.

## Take Steps To Minimize Paper Piles

Once you've set up the digital filing system, simply scan in any new paper. And take steps to minimize the amount of paper that crosses your desk each day. Here are three great tips that will reduce the amount of paper in your life:

- Sign up for paperless billing from all vendors that offer it and store the files in your digital filing cabinet.
- Instead of printing paper copies, print to PDF, and then save the PDF in your digital filing cabinet.
- Integrate eReceipts and order confirmations from online transactions into your digital filing system.

*It's a good idea to maintain hard copies of certain documents ( birth certificates, wills, deeds, passports, etc. ).*

# STEP 4:

## DIGITAL ROAD RULES

Many people aren't sure when it comes to storing files, and so they either hold onto everything or accidentally throw out something important. See the chart below to avoid losing anything important that you will need later.

### HOW LONG TO KEEP DOCUMENTS

#### Tax documents

Keep tax returns and supporting documentation for seven years. The IRS may audit you within three years if they suspect good-faith errors; six years if they believe you underreported your income by at least 25%; and unlimited time if you did not file a return or file a fraudulent one.

#### Bank statements

Keep for one month so you can check the accuracy of transactions. Unless the statement is your only record for a tax-related transaction.

#### Bills

Keep for one year, for tax purposes.

#### Paychecks

Keep for one year, until you receive your W-2.

#### W-2 forms

Keep until you begin claiming Social Security. They're the best estimate of your earnings and entitlements.

#### Credit card statements

Unless the statement is your only record for a tax-related transaction, shred immediately. These documents are a prime source for identity theft.

#### Investment records

Keep the records as long as you own the securities, plus seven years. You'll need them to prove capital gains and losses.

#### Retirement plan statements

Keep for one year, for tax purposes. Keep Roth IRA statements until you retire, to prove you already paid tax on your contributions.

#### DOCUMENTS TO STORE DIGITALLY & IN AN EMERGENCY KIT

*(either in a fireproof home safe or safety deposit box)*

Birth / Death certificates	Copy of your driver's license, green card & other identification cards
Social Security Cards	
Passports	Copies of lifesaving prescriptions (e.g., insulin)
Emergency contact information	List of bank account and credit card account numbers
Marriage certificates / divorce decrees	
Wills	Inventory of household goods

#### DOCUMENTS TO STORE DIGITALLY

Tax returns	Investment records	Recipes
Credit card statements	Bills	Education records & information
Bank Statements	Warranty / Rebate documents	Insurance Policies
Paycheck stubs		
Retirement statements	Legal documents	Auto Repair Records
	Medical records	



# STEP 5:

## PRODUCTIVITY & PEACE OF MIND

So many things to do; you don't know where to begin. That's the problem with long lists of projects and tasks. Just the sight of your to-do list can leave you dazed and confused; or feeling overwhelmed and frustrated. Solution: Convert your to-do list into an action list that tells you exactly what needs to be done next to move those projects along.

Begin every entry on your list with an action word such as: create, discuss, resolve, present, identify, send, pick-up, develop, show, etc. Now when you look at your action list, you know exactly what action to take to move things forward and begin making things happen. This is the way to move from productivity to peace of mind!

### Accomplish 1 important thing every day

Spend 5 minutes the night before and decide on one important thing you want to accomplish tomorrow. . . just one. And then, commit to getting it done by scheduling it on your calendar. You are much more likely to work on a project or a task if your calendar pops up to remind you of your commitment. Imagine if you are able to accomplish one important thing each day, five important things each week and 20 important things each month. Think about how that would change your life? And how that feeling of productivity would lead to peace of mind for you?

### Touch each piece of paper just once

We still handle documents, business cards, receipts, forms.... all types of paper - every day. Leaving those documents in a pile on your desk wastes countless hours searching for valuable information. Take advantage of the technology at your fingertips. Scan your receipts, business cards and documents weekly, then easily access important information in minutes, saving you time and producing better results.<sup>(5)</sup>

### Focus, Focus, Focus, and Focus

With innovations like the Internet, Twitter, Skype and PDAs, the world is your oyster. Opportunity knows no bounds. Possibilities are endless . . . and herein lies the problem. What should you do when you have so many options? The answer - "less is more!" Control yourself and FOCUS on those things that will help you reach your goals the fastest or best way possible. Select two or three things and do them well. Make an impact. Remember - it is better to move three things a mile than 100 things an inch.

# But wait, that's not all. What if you could get rid of your paper, and still keep the information stored on it?

You already know that digitizing your documents can help your company save time, money and space. Using Neat is more than having a digital filing cabinet. See, we don't just make scanners. They also come with our patented software that actually "reads" your paper, extracts key information for you and organizes it according to your preferences.

For instance, think about your current system for managing receipts (sorry for the mental image). Now imagine our scanners pulling key information from

receipts so you can easily export purchasing info to QuickBooks®. Plus, you can create a digital image of the receipt. Need to find something later? Just do a keyword search, and find what you want in seconds. Like we said, digital filing cabinet.

Basically, it comes down to two things. Our software does the work for you, and your paper is free to feed your starving shredder. What you do with your new-found desk space - and time - is up to you.



**NeatDesk™**  
DESKTOP SCANNER + DIGITAL FILING SYSTEM



**NeatReceipts®**  
PORTABLE SCANNER + DIGITAL ORGANIZER

Here are a few more ways digitizing your information with Neat products can help simplify your life and increase productivity.

## Finances

- Quickly turn receipts into electronic expense reports
- Prepare tax reports
- Track spending
- Store sensitive information securely

## Business

- Organize estimates, contacts, work orders and invoices
- Export business card contact information to Outlook®
- Export data to Excel®, Quicken® or Quickbooks® for analysis, tracking and management
- Maintain records of purchases for insurance purchases
- Preserve manuals and warranties for office equipment

## Home

- Now when things say “keep a copy for your records” you’ll actually do it
- Keep digital copies of birth certificates, medical records, wills, deeds and other important documents
- Preserve children’s schoolwork and artwork
- Scan recipes and search by ingredients to find ones you can make with available ingredients
- Organize prescriptions to keep track of refills and possible drug interactions

# THE MANY ADVANTAGES OF TAMING THE PAPER MONSTER



You will **save time** by searching less for stored paper documents. Emailing and utilizing digital files over “snail-mail”, paper files, and faxing allows for **faster access and easier organization**.

Using Less paper leads naturally to better spending management allowing you to **save money** on things like postage costs, envelopes, and printer paper. Using less paper is **good for the environment** and with less clutter, comes less stress, which creates a **better quality of life** for you and the people you care about most.

When all is said and done, taming the Paper Monster ultimately leads to **peace of mind** knowing that all your important documentation is safe and everything can be found easily when needed.



If you have any questions about how NEAT solutions can help you or your business, contact us:

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**Thanks to our Neat Fleet** for lending their expertise: Joshua Zerkel, Louis Hutt, and Orna Drawas.

For more information on the Neat Fleet visit [neat.com/neatfleet](http://neat.com/neatfleet)