



## Creating a Paper Trail

The phrase creating a paper trail can harken the image of children leaving a trail of breadcrumbs as they wander through the woods to ensure they can find their way home. A paper trail, in work, is a very similar concept. A paper trail at work will allow you to trace your steps, locate files, and even remember when you spoke to a client.

The world is continually moving at a faster and faster pace, clients want increased attention, and our supervisors want to know where we are on each project. The most effective and efficient manner to manage the information you are taking in, the projects you are working on, and where your information is located, is to create a paper trail.

Tips to help you track your steps:

1. Use your daily calendar to track who you spoke to, who you called, and who you left a message for. This ensures all meetings, phone, online, and in person, are recorded in one place. It will also make it easier for you to track when you left messages for clients.
2. Place all notes in one file, digital or hard copy, for each project. Get in the habit of tracking important milestones, when information was shared and with whom, and also keep a record of all due dates and when each portion of the project was submitted and to whom.
3. Save any notes or messages you receive. People will often say they called and left a message when in truth they did not, or even worse, you did not receive the message. Create a file to hold all messages and notes you receive. If you continually keep track of all messages received, you will be able to review the notes to ensure you answered all questions and responded appropriately.
4. Tracking when emails are sent is as easy as noting it in your daily planner. If you feel your daily agenda is becoming cumbersome with all the noted information, create a digital online calendar for tracking purposes.
5. Create a filing system for all important paperwork and consistently use this filing system.
6. Make sure there are accessible notes to locate items in your filing system and cloud should you be unavailable.
7. Consistently be in the habit of tracking all your work, meetings and communications.