

ORGANISING YOUR WORKSPACE

1996

This is an extract from a detailed book in the office

1. WHY GET ORGANISED

More control, Others can find information, No chaos, Good role model, More time to do the things that you enjoy.

Key Principles:

- Organisation makes work and life easier
- Anyone can do it
- Start and continue

2. HOW BACKLOGS DEVELOP

Fear of dumping (tossing out), Fear of inflexibility, Fear of losing spontaneity, No energy, Not sure where to start.
Dumping: Duplicate, Date, Needs/Wants, often, current, Time, Likely, Someone else.

3. WHERE TO START

Define:

- Primary work space and support work areas, then personal files.
- Prioritise work from closest to furthest.
- Now decide on furthest work (usually oldest so easier to dump)
- Now categorise work within areas.

How do you feel?

4. YOUR WORK AREA

Empty one draw at a time and resort. Everything on your desk must earn it's keep. Least used goes further away. This applies to tools and equipment
Now sort, label and clean out.

5. FILING IT AND FINDING IT

Make it "S.E.M" (Simple, Easy, Manageable)
Create client files. Create project files, Create administration files and personal files.
File articles by subject, not date or time, and colour code if appropriate.

6. MANAGING YOUR DESK AND YOUR PAPERS

Calendar – use pencil. Record and file items. To do list – no more than ten items. Project list. Track delegated work.
Prioritise work trays (green, amber, red).

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7. CLEARING OFF THE STACKS

Tie up loose ends: Loose papers

Tickler system to RVN files keep stacks away:

- Items awaiting decisions by others (Pending file).
- Lots of little pieces of paper record and toss.
- Things you keep of interest (Interesting file)
- Items to decide on (Decision file).

8. MANAGING YOUR MAIL AND YOUR READING

Sort it into priorities. Sort by action. Make decisions. Don't read unless you are ready to decide.

9. QUICK REVIEW, CHARTS AND CHECK LISTS

Get started. Work areas filing, managing and maintaining, clearing.
(see chart on pages 82 and 83 of the book, otherwise - see next page)

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REVIEW: CLEARING THE TOP OF YOUR DESK

ITEM	PURPOSE	EXAMPLE	LOCATION
In Basket	Single location to place newly arrived materials in preparation for sorting.	<ul style="list-style-type: none">• Daily mail• Work from the Association• New information	On your desk
Out Basket	Single location for completed items prior to distribution.	<ul style="list-style-type: none">• Response to letter delegated to Joe• Outgoing mail• Document to type	On your desk
To-Do List	An ongoing list of things you are going to do. Serves as a memory aid and helps to set priorities.	<ul style="list-style-type: none">• Phone calls to return• Evaluations to review• Letter to write• Work assignments to plan• Draft outline of program	On your desk
Calendar	Tells you <i>when</i> you will be completing or reviewing certain items. Should include due dates for projects.	<ul style="list-style-type: none">• Upcoming meeting and its location• Appointments• Presentation dates• Hard deadlines	On your desk
Tickler File	For items needed in the future that do not have a permanent home elsewhere.	<ul style="list-style-type: none">• Back-up documents for upcoming appointments• Application to fill out not due for six weeks• Item you will begin next week	With assistant or in the file drawer of the credenza

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ITEM	PURPOSE	EXAMPLE	LOCATION
I. Working Files Current Projects	To keep documents pertaining to currently active projects together.	<ul style="list-style-type: none">• The Anderson proposal• Quality Investment Teams• Client files• Upcoming seminars	Inside your desk
II. Working Files Administrative	To keep documents pertaining to ongoing administrative projects or activities together.	<ul style="list-style-type: none">• Minutes of weekly staff meetings• Newsletter ideas• Program descriptions• Financial information• Vendor files	Inside your desk
III. Action Files People Files	To hold information pertaining to a person with whom you work closely. Any information where the next step in the process belongs to them.	<ul style="list-style-type: none">• Note to check status of response• Paperwork related to new delegated project• Staff's long-term goals• Ideas to discuss next time you meet	Inside your desk
Wastebasket	To immediately remove unnecessary paper and to encourage quicker decision making.	<ul style="list-style-type: none">• Anything that reads "you may have already won..."• Second copy of the semi-final draft of the preliminary...	
Optional Reading File	To keep items for review off the desk, but not forgotten.	<ul style="list-style-type: none">• Journals and magazines• Vendor newsletters• Articles	Credenza drawer

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10. A FRIENDLY REMINDER

Throw out and recycle, decide, place like things together, keep close only things you use frequently, label everything, complete items once, make follow up notes on calendar and to do lists, refile and replace quickly, keep it simple, clear the desk at the end of each day.