

How to Organize Your Office

By Pamela S. Leven

If you opened this magazine immediately and started reading, congratulations! You are decisive. You take action immediately. You are an organized person and an asset to your company. You've probably never lost a document, missed a deadline or lost a client.

Desks in disarray cost the national economy billions of dollars. Dan Aslett, an organizational expert, estimates that disorganized workers lose 20 percent of their efficiency. This translates to 400 hours a year for the typical worker who, distracted by his or her own junk, spends time searching for documents, dealing with the consequences of missed deadlines and repeatedly apologizing for the mess. "The cost of a messy office can be more than the time lost hunting for things," Aslett said. "Clients generally don't call back if they don't hear from you, and they may take their business elsewhere."

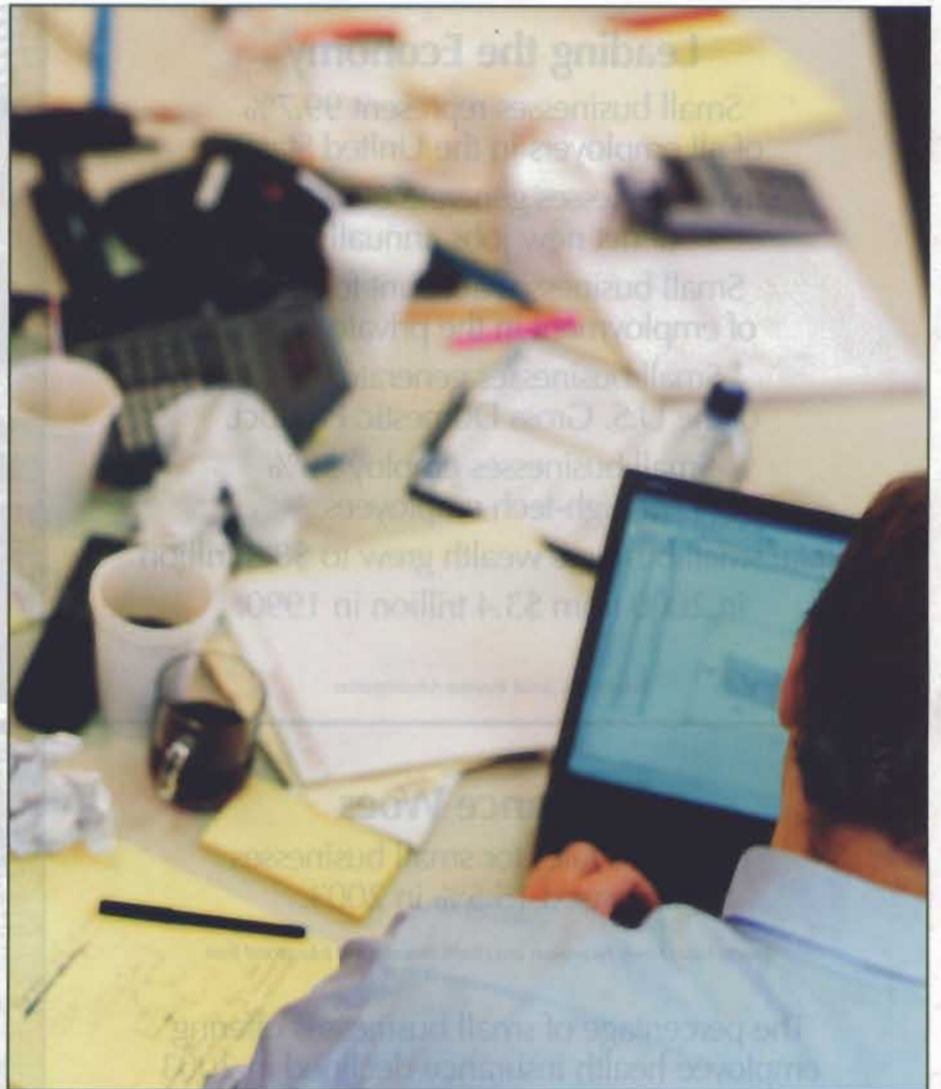
Staying neat is not easy. If it were, we wouldn't have acres of books on the subject, people who make their living tidying other people's messy homes and offices, and two trade groups for professional organizers (one national; one international) with certification programs.

The Organization Appointment

Janet L. Hall knows messes. She founded Overall Consulting to help the organizationally challenged. She is a certified professional organizer (CPO) and a certified records management (CRM) specialist. She's written numerous books, including *Secrets of a Professional Organizer and How to Become One*. Her motto is "Smiles, not piles."

"This didn't happen overnight," warned Hall, "so you won't get it started and organized overnight."

Hall recommends beginning the monumental task by setting a date and time like making an appointment with a doctor or a dentist, "so you have to go." Decide how long you intend to work. Some people like the mornings; others only have 15 minutes or an hour here and there. Hall suggests buying an egg timer. Swear to yourself that you'll physically stay in your office, organizing nonstop, until you hear the ding.



Source™ highlights:

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Keep It That Way

"Sorting is the first step. Some people think the first step is buying organizing materials, but you need to know what you have so you know what to buy," Hall said.

Hall's sorting system starts with the visible piles on the floor, desk, chairs, shelves, everywhere. You'll get to the unseen mess in the files and drawers later on. Create a "staging area." Get garbage bags or boxes and label them as follows:

- Toss it.
- End it. Old magazines, for instance.
- Act on it.
- Store it in three groups:
 - Current Stuff
 - Things for Reference
 - Historical Stuff
- Enter it ... into your planner, your calendar, or your computer.
- Refer it.
- Recycle it.

- Read it.
- Repair it.

Don Aslett's sorting system calls for four sturdy boxes that are labeled as follows:

- Out
 - Route
 - Doubt. You will process this box daily until it is empty.
 - Sprout. The stuff you need. You must activate this paperwork or file it.
- Aslett, who has been in the cleaning, organizing and time-management business since 1958, and has a national company that cleans 300 million square feet of offices nightly, advises that you "never dump without doing some selection, no matter how mean and desperate you feel – it will haunt you forever and you'll lose some good stuff."

A warning about ruthless sorting: Think about a record-retention policy for your company if you don't already have one. If you're self-employed, consult your accountant and industry experts.

The Moneymaker Pile

Hall's "Current" pile, like Aslett's "Sprout" pile, is your moneymaker paperwork, your current client work. Hall suggests storing these documents in a rolling file cabinet, either with drawers or open hanging files. Wheels are important so you can grab files without getting up, she says. Her "Reference" includes files that leave your office for storage, somewhere reasonably accessible. "Historical" goes to company central files or off-site. If you work in a home office, store "Historical" files in the basement, attic or under the steps, Hall said.

Both organizers insist that your desktop should contain only the paperwork you use daily or weekly. They hate promotional trinkets that everyone brings home from seminars and



Suggested Shopping List

Don Aslett, author of *America's #1 Dejunker*, suggests 10 "smart items" for people who want to dejunk their offices and stay dejunked – plus his observations:

1. Large wastebaskets. "Because I always see overflowing waste baskets."
2. Photo albums and frames. "Get photos off your desk and out of your boxes. You have more wall space than floor space and desk space."
3. Mailing envelopes – padded and plain. "Almost one-third of your stuff can be sent to other people. If you have envelopes handy, you'll use them."
4. Plastic storage boxes with handles. "I buy these like I buy corn flakes. Containment enhances organization; piling doesn't. You don't put garbage in a box."
5. Moveable lamps. "Light lessens clutter. It's a psychological thing. Dark places are like dungeons, and they attract piles."
6. Desktop condensers: scissors, tape, stapler, and staples. "With these simple tools, you can save information you need – magazines are mostly ads, and keep pages together. I recommend desktop tape dispensers that you can use with just one hand. I don't use paper clips because they fall off."
7. Loose leaf binders. "I'm not a computer guy. I use binders to keep a lot of paper that people put in file drawers. I can easily find what I want."
8. Snub-nosed scissors and small rolls of tape. "You can take them on airplanes. When I travel, I strip magazines. I keep the pages together with my travel roll of tape."
9. Tabbed file folders. "I always have at least 100 file folders on hand. I use one for every new project and every new client. Each file is clearly labeled."
10. Extra large cork bulletin boards. "Post things you use a lot where you can see them. A wall is a better place to store things than the floor."

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Because the IRS Says So

Some business records must stay with you forever. Others have shelf lives.

The Internal Revenue Service generally determines the longevity of paperwork. The IRS gives taxpayers seven years to file amended returns for losses from bad debts or worthless securities, and three to six years for law-abiding businesses to recalculate their taxes, with supporting paperwork, on previously unreported income. (Miscreants, apparently, must keep their paperwork forever because the IRS has no statute of limitations on fraudulent returns and for taxpayers who fail to file.)

Sample guidelines:

- **Seven years:** Accident reports, accounts payables, cancelled checks, inventories, invoices, payroll records, sales and purchase journals, and time cards.
- **Three years:** General correspondence, employee records after termination, employment applications, expired insurance policies, and petty-cash vouchers.
- **One year:** Bank reconciliations, duplicate deposit slips, purchase orders, receiving sheets, cancelled stock, and bond certificates.
- **Forever:** Audit reports, capital stock and bond records, corporate reports and minutes, and property appraisals. Documents such as purchase orders and receiving sheets may be tossed after one year.

The IRS offers basic advice on record creation and retention in Publication 583, *Starting and Keeping Business Records*, available free at www.irs.gov or by calling Telephone Assistance for Business (1-800-829-4933).

For specific advice on records retention in your state, consult your accountant.

Sources: Virginia Society of Certified Public Accountants; Internal Revenue Service



conventions. They don't even like photos that occupy valuable desk real estate. Those should go on the wall or a credenza.

To keep your paperwork organized, Hall prefers accordion-style folders. They come labeled with months of the year and days of the month. She hangs them in pretty open stands, along with her current, reference, and soon-to-be-filed-elsewhere historical files. "This replaces the In and Out boxes on your desktop," she said. Every piece of paper belongs in some file. "When you pick up a piece of paper, decide the next action you need to take, including throwing it in the trash." Aslett concurred: "Most clutter is caused by indecision."

Digital imaging gives you a space-conscious way to store documents on CD-ROMs or Zip drive disks. Hall recommends hiring a professional for big jobs. "Pay the price, and get it over with," she said. If you have small batches of paper to digitize, use your scanner during free moments.

Hall has another favorite tip: toss all your empty software boxes and jewel cases. You can't return programs, so what's the point of keeping them, she asks. She suggests storing software CDs in albums designed for music CDs or plastic sleeves with three-hole punches. Include serial numbers. Put the manuals in a hanging folder.

"Professional organizers are always looking for new ideas to review, test, recommend," Hall said. "You know what works best for your personality."

Pam Leven is an independent business writer who contributes regularly to trade and consumer magazines.

Source™ highlights:

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- Weyerhaeuser® File Storage Boxes, letter and legal size, #983796, \$11⁹⁴, [Available In-Club Only](#)
- Post-It® 1.5" x 2" Note Pads, 24 pack, #210588, \$7⁹⁹, [Available In-Club Only](#)
- Post-It® 3" x 3" Note Pads, 1800 sheets, #710065, \$9⁹⁹, [Available In-Club Only](#)
- Post-It® Adhesive Flags, 440 pack, #243014, \$8⁹⁹, [Available In-Club Only](#)
- Acco® Paper Clips, 20 pack/ 200 clips, #657813, \$3³², [Available In-Club Only](#)
- Avery® Laser File Folder Labels, 882 labels, #778674, \$4⁹⁹, [Available In-Club Only](#)
- Brother® Electronic Labeler, 2 tapes included, #719044, \$29⁹⁹, [Available In-Club Only](#)
- Brother® P-Touch Label Refills, 3 pack, #638927, \$28⁹², [Available In-Club Only](#)