

Get Organized in 2010

by Eve Gumpel 1.26.10

A majority of female workers (64 percent) consider reducing or eliminating piles on their desks a top priority this year, according to a survey conducted for Office Depot by MARC Research.

The survey also revealed that disorganization commonly leads to lost time (47 percent), meeting tardiness (16 percent) and missed deadlines (14 percent.)

With that information in hand, Office Depot has added a Get Organized tab to its Facebook page, which includes tips from the National Association of Professional Organizers. The tips are specially timed for January, which NAPO has designated as "Get Organized Month."

WomenEntrepreneur.com spoke with Laura Leist, president of NAPO and founder and president of the organizing services firm Eliminate Chaos, to ask her advice on getting your home office organized this year.

Leist says there are five elements to organizing an office: Paper, stuff (anything that isn't paper), space (how the office is configured), electronic information and time.

Leist pointed to several common problems when it comes to organizing:

1. Not knowing how to set up a good system to store information
2. Fear of losing information.
3. Holding onto documents that can be eliminated.

Leist says if you're running a business out of your home, the guidelines for what you need to hold onto are different from the guidelines for a residence.

"We all know that you need to hang onto tax records for seven years," Leist says. However, you only need to keep supporting documentation, such as 1099 statements or phone bills, for three years. IRS publication 553 provides more specific guidelines on deviations from the standard seven-year rule.

Leist says everyone should clean out her files once a year, typically during tax season. She has her clients create a list of things they need to pull out of their working files annually and move to an archival system. "Things like your bank statements, client contracts for the year, credit card statements, expense reports, time sheets, statements from different vendors you work with, all the quarterly and monthly taxes that you file and all your receipts," she says. "We make a list of the documents you need to pull each year and have them put into a banker's box -not cardboard, but plastic.

"We create a bin or two for each year and drop the hanging files in and take one set of folders out that were labeled for that year and drop a whole new set in. So you have a rotational system going on each year. In year four, you can rotate and take the stuff out and have a new box to work with."

Leist says she doesn't necessarily toss everything after three years. For example, she scans client contracts and stores them on her server, but she keeps the hard copies around indefinitely. "Sometimes you actually have to produce an original, so I don't get rid of those," she says.

Leist's top tips for fixing a disorganized office or desk:

1. **Leist dismisses the theory that you should only touch a piece of paper once.** "You don't," she says. "If you get a bill in the mail, you're not going to

run and pay it immediately." So you need to designate a place to put it.

She advises people to create what she calls a daily action center--the file drawer or portable file box that contains the project folders and files you use on a daily basis.

2. **"Get it off the desktop,"** says Leist, who puts her action center under her desk.

3. **Distinguish between current, ongoing projects and the type of files that need to be reference.** Also distinguish between information that is client- or project-related and information that it takes to operate the business. The latter includes advertising and marketing ideas, website information and tax documents. "Don't co-mingle the two categories," she says.

If you're using, say, a four-drawer filing cabinet, maintain two drawers of client-related files and dedicate two more drawers for operational files. That way, when it comes time for you to find something, you know automatically which drawer you're going to.

4. **Separate personal and work-related files.** Either use two different filing cabinets or use different drawers.

5. **Leist uses what she calls the PAPER method.** Process the paper on a daily basis. Take **Action** if you can. That is, either put it in your daily action center or forward it to someone else. The second **"P"** stands for **Pass** on to someone else or forward. **E**liminate, recycle or shred that document. **R** stands for **Read**. "Those are all the things you can do with any document that arrives in the mail on a daily basis," she says. "If you can't act on it and

it doesn't need to be recycled or shredded, then it just needs to be filed."

6. **Have a designated location for things that need to be filed.** She suggests filing papers on at least a weekly basis.

Leist has tips for handling your e-mail, too:

1. **"Your inbox is not the filing cabinet for e-mails,"** she says. It should only contain e-mails that still require action. Subfolders will help you eliminate chaos. In essence, you can almost re-create your hard copy filing system in your e-mail account.
2. **Leist lives by what she calls the two-minute rule.** If she can deal with an e-mail in two minutes or less, she does it right away. "By the end of the day, I want to have gotten rid of as much e-mail in the inbox as I can," she says.

E-mails that require more than two minutes are the ones that get people into trouble, Leist says. For example, a project that requires an hour of work comes in through your e-mail. "We think of it as e-mail," Leist says, "but really, it's a project." Those are the things small-business owners never make the time to do. So e-mails sit there. Leist says you can drag an e-mail onto a calendar or schedule it as a task or appointment and block out a certain amount of time to get it done.

Leist warns that getting organized is a process, not an event. That's why people procrastinate, she says. "They realize it's very time-consuming, and they don't know where to start."

Leist suggests that you break the process down into manageable pieces that won't eat up hours at a time. For example, she suggests, "Gather up receipts and

sort while you figure out which to keep and which to shred," she says. "Then it's easier to do the next parts. You've been through the steps, seen what it takes, you're motivated and it feels great."