bonus handout *organize your paper clutter at work*

If you work in an office environment and are looking for a simple, organized approach to dealing with your paper clutter, this bonus handout was created with you in mind. It is designed to show you how to apply the concepts from the *Organize Your Paper Clutter* workshop to your office papers, so you can get your work done more efficiently and effectively.

As you read along, remember that many of the key principles discussed in *Organize Your Paper Clutter* will apply directly to your paper at work. For example, paper clutter in the office, like paper clutter in the home, represents lingering decisions and lingering to-dos. The consequences are similar, too. When you're surrounded by paper clutter on your desk, it's hard to prioritize your to-dos and it's difficult to stay focused.

The good news is that the solutions and thought processes you used to solve your paper clutter issues at home will work at work, too. You'll find the same general categories of paper in your office as you do at home. You'll find action papers that are in your work space because you have a task you need to perform with or because of the paper. You'll have reference papers that you keep close at hand because you access them frequently. And you'll have some archive papers. These could be completed projects or records that you want to keep because you may refer to them again in the future…just not as frequently as your reference paper.

As you begin taking action and organizing your paper at work, tackle it just as you did with your paper at home—one category at a time. Remember that organizing your paper in the office will be comprised of projects—setting up systems that work for you and how you perform your job—and habits -- using the systems routinely. And, just like at home, if you take daily action on your paper at work, such as spending just 15 minutes a day making progress, you'll not only create new paper habits, but you'll finish your projects more quickly, too.

Alright, let's get started applying the *Organize Your Paper Clutter* concepts to your paper at work.

> *If this is your first time through Organize Your Paper Clutter, the concepts in this handout will make more sense to you once you have completed all of the lessons in the workshop. Remember to tackle your office paper one category, and one lesson, at a time.*

COLLECTION

Just like at home, every office needs a single spot to collect unprocessed papers. This is the spot for your mail, meeting notes you need to read through and process, as well as any other paper that is landing in your workspace for the first time. The first step is to decide on a location for your collection system. If most of the paper in your workplace is self generated, then establishing a collection spot on your desk could be a great solution for you. On the other hand, if your coworkers generate your office paper, then it may make more sense to set up your collection container in a spot easily accessible to your coworkers.

everyday example

I spent more than 13 years working in a corporate office environment. If I had a piece of paper to deliver to a coworker and they didn't have an in-box, I'd use their chair to make sure my paper caught their eyes! To avoid paper from landing on any available surface in your office like your desk, credenza or even your chair, establish a collection container in a convenient location in your office. Then, let your co-workers know about your new system.

Select Your Storage Solution

Once you've selected the location for your unprocessed paper, the next step is to select a container. If your work environment allows it, think beyond the traditional letter tray or in-box. Instead, select a container that is pleasing to your eye, such as a colorful tray or a wicker in-basket. While in-boxes are traditionally thought of as a horizontal tray, consider going vertical with your collection bin. This simple shift in orientation can help you feel more in control of your paper.

Once you select your container, label it to let your coworkers know this is the one (and only!) spot for your incoming paper.

Identify the Habits Needed to Use the System Effectively

If you've tried using an in-box in the past with minimal success, then you may not be super excited to learn that this is step one in gaining control over your paper clutter at work. If you're feeling this way, keep this in mind: Organizing is a combination of projects and habits. The in-box usually goes amuck for many people in the habits

phase. They either don't clearly define what the in-box is used for, or they don't establish the habits for using the in-box effectively. Has this happened to you? Did you have fuzzy boundaries for what went into your in-box? Did you pick up a piece of paper and not know what to do with it…so the paper went back into the in-box? If so, make a point to identify the habits you need to make your collection system work for you this time around.

HABIT #1: USE YOUR COLLECTION BOX FOR UNPROCESSED PAPER ONLY

The in-box often becomes the holding ground for all the paper in the office that needs your attention, or for items you don't want to file away because you don't want to forget to do something with them…or forget where they are. When used this way, the collection box becomes more like an action box or an *indecision* box! To use your collection box effectively at work, create the habit of only allowing your in-box to be used for unprocessed paper. When you set up the rest of your downstream systems—action, reference and archive—this will be a much easier habit to create.

HABIT #2: PUT ALL UNPROCESSED PAPER IN YOUR IN-BOX

Use your in-box to collect all of your incoming paper. For example, when you come back from a meeting and have notes you need to go through to capture action items (or send a quick email to your team), put these items in your in-box until you have time to process them. Use your collection box for print-outs to review or file. Then, create habit number three.

HABIT #3: EMPTY YOUR IN-BOX DAILY

Use the thought process covered in Lesson 2 of *Organize Your Paper Clutter* to process your paper on a daily basis. Make a decision about each piece of paper in your in-box. This habit will be easiest to create if you carve out a slice of time on your calendar each day to process your paper, making it your goal to completely empty the box at least once per day.

Once you have your collection system in place, the next step is to set up systems for the other three types of paper—your action, reference and archive paper. Let's begin with the action systems, since this category of paper is the most mission critical at home and at work.

ACTION

Your action paper at work is the most important type of paper to cross your desk. This paper comes into your work space because someone expects *you* to do something with it or about it. Start by evaluating what systems you need to keep your action papers organized and easily accessible when you're ready to hunker down and take action!

Evaluate Your Needs

To create your action systems at work, start by considering the nature of your work. How many of your daily tasks are generated by paper? If you're a teacher, for example, you have papers to grade. A fair portion of your daily tasks may be paper-based. In my prior career, one of my primary responsibilities was project management. In this role I had a lot of action paper to organize, ranging from meeting notes (with action items recorded) to drafts of documents and project schedules. If you have employees that report to you, you may also need to create systems for tracking their action items, if you are ultimately responsible for their results.

Consider the work you do at the office for a moment and list your answers to the following questions:

✳ What types of action papers do you have to organize and keep on top of?

✳ Are your current systems working well for you or do you need to tweak your systems or create new systems from scratch to better manage your priorities and meet your objectives?

✳ Do you need to set up systems to track the work of those who work for you?

Select Your Storage Solution

Once you have evaluated your work action paper, the next step is to select your storage solution. Use the same criteria you used to select storage solutions for your household paper.

LOCATION

Of the three paper systems, you probably access your action papers most frequently. Because of this, you will want to designate the most prime real estate in your work area for your action systems. Use an area in your workspace that you can see easily and/or is in arms' reach when sitting on your desk chair.

OPEN VERSUS CLOSED

If you have piles of papers in your office right now and they're serving as a reminder to you, then you may be most comfortable with an open storage system for your action files. Consider a desk top file sorter, file basket, or even a clipboard or bulletin board. If closed storage works for you, then designate your easiest-to-access file drawer for your action papers.

AESTHETICS

Just because you're at work doesn't mean your paper systems can't be fun! I'm all for infusing the workplace with a bit more fun. (When you do, I bet you'll find you get more done as a bonus.) As you select your storage solutions for your work paper systems, keep aesthetics in mind. If you love how your office space looks, you will feel happier at work and be more productive.

PORTABLE VERSUS STATIONARY

Do you transport paperwork between your workplace and your home? If so, consider a portable action system, one that makes it simple to do your work in either location.

Develop Your Organizing Scheme

The organizing schemes that work for household action paper will work great for your office paper, too. Let's explore these now.

CATEGORIZE BY ACTION REQUIRED

If you have routine actions you take at work, category files may work well for you. When you group like actions together, it allows you to batch process your tasks and get your work done more efficiently. For example, if you're responsible for making follow-up calls to prospective clients, you could create a "follow-up" folder and make your calls at a set time each week. If you're responsible for paying the bills at work, a "to pay" file folder could help you corral these action papers e. If you use category files, use action-oriented labels to inspire you to take action.

CATEGORIZE BASED ON THE PERSON RESPONSIBLE FOR THE ACTION

If you are responsible for the outcomes of others, consider creating a folder for each person in your group. This approach can help you keep track of notes from prior conversations and keep tabs on your employees' projects and responsibilities. This can also help you make the most of your meeting time with employees. If you have a large staff that works for you, consider creating files for each department or supervisor.

CATEGORIZE BASED ON TIME

The tickler file is right at home in the office, too. If you work on multiple projects or deadlines, a tickler file can help you spread your workload out over the course of a week or month. Likewise, if you have tasks that are performed on specific days of the week (such as staff meetings on Monday mornings), a tickler file makes it simple to corral together the papers you need for your meetings. If you travel frequently for work, use a tickler file to collect travel-related items such as tickets, travel arrangements and meeting agendas. A tickler file also works well as a follow-up system. If a co-worker tells you they'll get you some information in a week, drop a note in your tickler file to remind you to follow up with your co-worker.

CATEGORIZE BY PROJECT

If your job entails managing or participating in projects—a series of tasks with a defined outcome—consider organizing your papers by project.

everyday example

Many of my responsibilities at simplify 101 involve project management. For example, creating a new workshop is a project with many moving parts and deadlines. There is a defined outcome—creating the lesson materials so we can offer the workshop to workshop participants. During this workshop creation phase, I use file folders to organize notes, ideas and drafts of lesson materials.

## Identify the Habits Needed to Use Your System Effectively

As with your household paper systems, your action systems at work will be effective to the extent that you create the habit of using them consistently. If you create category-based action files, for example, consider what will trigger you to take action and reach into each of your file folders and perform the necessary tasks. You could record the to-do as an action item on your to-do list or block out time on your calendar to work on each set of tasks.

CREATE THE HABIT OF DAILY ACTION

Just as at home, if you deal with your paper at work on a daily basis, you'll dramatically reduce your paper clutter. A tickler file requires the habit of daily action so things don't get lost inside. But whether you use a tickler file or another system for categorizing your action papers at work, carve out time every day to process your papers and perform the associated tasks. You'll find it's easiest if you create the habit of doing your paperwork at the same time each day and work this into your daily work routine.

CREATE THE "DO IT NOW" HABIT

Just as with household paper, much of the paper clutter at work is the result of delayed decisions and delayed actions. When you create the habit of handling the actions associated with your paper right away (whenever you can), you will feel more in control of your work day, and you will have significantly less paper clutter in your workplace.
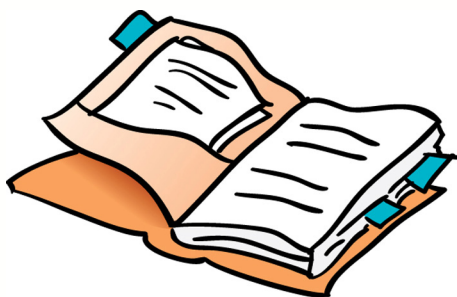
REFERENCE

Once you have action systems in place, move on to your reference papers. This is paper that doesn't require any action on your part at this time, and if there's ever an action associated with it, something other than the paper will trigger you to perform the task. Depending on the nature of your work, your reference paper could include checklists for routine tasks, operating procedures, the office phone directory, or office schedules and deadlines.

Evaluate Your Needs

What documents do you refer to in your office on a regular basis, such as daily or even weekly? Start by creating a list in the space below, or gather these documents together.

Select Your Storage Solution

When setting up your reference systems, think "easy access." Three-ring binders stored on your desk, a nearby bookcase or a nearby file drawer outfitted with file folders are terrific solutions for your reference systems. If you have just a few reference items, and you want to keep them out in the open where you can see them, a bulletin board can work great for reference items, too. In general, when selecting storage for your reference systems, use the same thought process you used with your action systems. Consider location, aesthetics and whether or not an open or closed solution will work best for you and the papers you need to store.

everyday example

Just as with my household paper, my go-to solution for business reference documents is three-ring binders. I have a general reference binder with how-to documents, checklists and passwords. I have a payroll binder I pull out every pay day to do payroll. And once the project phase of developing a workshop is done, I create a workshop reference binder to use each session of a workshop.

Develop Your Organizing Scheme

The next step is to decide the categories for your reference documents. The best way to approach this is to think in terms of when you would access your reference items and how you would think to look for them. If you aren't sure which categories will work best for you, group like items together and then create temporary categories using sticky notes. Once you feel good about the categories you've selected, pull out your label maker and make your labels permanent.

Identify the Habits Needed to Use the System Effectively

The main thing to consider with reference papers is how to keep your reference documents current and relevant. Create the habit of maintaining your reference systems as you use them. For example, when the new company phone directory is published, recycle the old one. An alternative approach is to carve out set times to maintain all of your paper systems, such as during slow periods like the holidays or the off season at work.
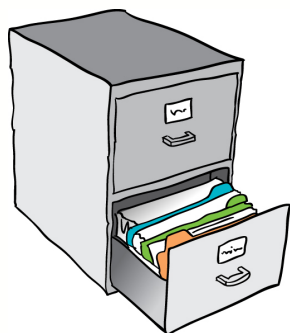
ARCHIVE

Just like at home, your work archive papers are like your permanent records. These are documents such as old projects or client files that you want or need to hold onto for a period of time. There is no current action associated with your archive papers. Just like your home archive papers, you will access your work archive papers far less frequently than the other three kinds of paper—collection, action and reference.

Decide How Many Systems You Need

As you consider what types of documents you need to hold onto permanently, check your company procedure manual. Your place of employment may have document retention guidelines you need to follow. Similarly, you may have a central filing system that makes it unnecessary for you to maintain records in your own office. Do some research to find out what's required based on your company policies before you invest time in creating your own system for archive documents. Once you know your company's policies, then begin considering the types of documents you'd like to hold onto permanently to aid you in completing your job responsibilities. As you consider your archive needs, list your thoughts in the space below:

Select Your Storage Solution

Because you will access your archive documents infrequently, it makes sense to store these items in the least convenient areas of your office, such as in a file cabinet or on a bookcase that is a few steps away from where you sit. Keep in mind that something external will trigger you to access your archive documents, so out-of-sight storage such as file cabinets work well for archive files.

Develop Your Organizing Scheme

As you create your organizing scheme, use the same thought process you used for your reference systems. Consider *when* you would access your archive items, and *how* you would think to look for these items. Use the file map document from Lesson 5 to record your organizing scheme for your archive files. Then, tuck this into your reference binder and refer to it whenever you do your filing…until the system is second nature to you.

Identify the Habits Needed to Use the System Effectively

CREATE THE HABIT OF FILING YOUR ARCHIVE PAPERS REGULARLY

If you don't enjoy filing, create the habit of doing less filing more often, instead of letting your filing pile up and hang over your head. When you finish a project, make it a habit to go through your project documents, discard what you won't need again and move what you do want to keep into your archive filing system.

MAKE IT EASY TO CREATE A FILE FOLDER

Of all the tips in Lesson 5—the archive lesson—the one I'd love for you to take to work with you is this: Make it easy to create a new file folder. As I said in the lesson, "it shouldn't take an act of Congress, a note to Sally or a single step away from your work station to make a new file folder! Store blank file folders and a label maker where you store your files, and make it simple to create a new folder any time you need it." If you do this, it will be even easier to create the habit of filing regularly.

RECAP

I hope you enjoyed this bonus handout! As you now see, the thought processes used to organize your paper at home will be super effective for your work papers, too. Remember to take it step-by-step and category-by-category, and in time you will have paper systems that work for you—at home and at work.

Happy organizing!

Aby