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Blue Papers™

Clean Up Your Act

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Getting organized is just plain good business

Remember those opening scenes from the first Harry Potter movie? Harry has been sent a letter inviting him to study at Hogwarts, but his horrid uncle rips it up. Soon more letters arrive and then more, cascading in through the mail slot and shooting down the chimney, demanding attention. The quantity drives Mr. Dursley nearly mad, and he takes his family to a remote cabin in a last-ditch attempt to escape the persistent letters.
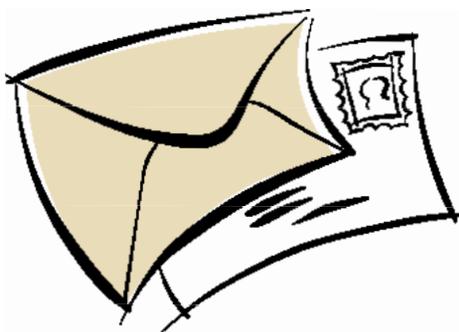
Ever feel like Harry's uncle? Not stingy and mean that is, but beleaguered and oppressed by papers and incoming mail, email, and messages. Is your inbox overflowing? Do you step around piles of work on your way to your desk?

According to Laura Stack, organizational expert and trademarked "Productivity Pro," most people have one to two week's worth of work on their desk at any given moment. Yikes! That's a big to-do list for such a small space.

Storing all that work on your desk inevitably leads to lost information, as the changing demands of any given workday force you to shuffle between projects. Papers get misplaced. Phone numbers and great ideas are written on scraps of paper that end up who-knows-where. According to the Delphi Group, a Boston consultancy, 30 percent of all employees' time is spent trying to find lost documents.[1]

But it's not just time spent locating papers that's the problem, you have to consider lost mental capacity as well. It takes energy to survey those stacks and figure out what to focus on next. Ever pick something up and reread it, trying to figure out just what it dealt with, only to drop it right back into your inbox? That's wasted brain power you could have used to get something accomplished. And it's not just papers

[1]*"So many reasons to neaten up, but it's too imposing," by Jane M. Von Bergen, Knight Ridder Newspapers, March 12, 2006. Viewed online at www.boston.com, August 3, 2007.*

we're ignoring. Add to that the modern demands of email, with new messages pinging at you and action items piling up two or three screens deep. It's exhausting.

Mind Like Water

There's a saying oft printed on mugs and office tchotchkies: "A clean desk is the sign of an empty mind." Intended as a snarky defense for those of messy habits, the saying has some unintended merit. A clean desk does create an empty mind—one with room for creativity and focus.

It's a concept David Allen refers to as "mind like water." Allen, dubbed the "personal productivity guru" by Fast Company magazine, spent much of his 20s and early 30s pursuing inner awareness and a Zen-like state of being. For Allen, the mind like water simile means the mind is clear—at its most optimum and productive state. He likens it to what athletes call being in the zone. For him, the end goal is a stress-free life. Organization helps you achieve this heightened state of clarity more often, thereby increasing your productivity and, consequently, reducing your stress.
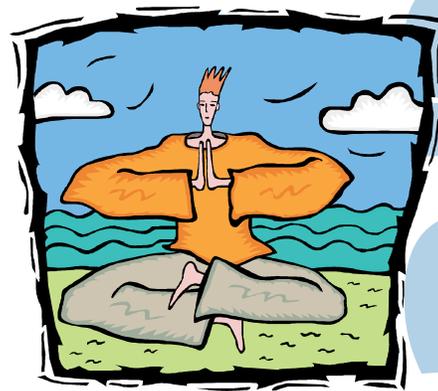
David Lewis is a British business psychologist who specializes in mess, stress and information overload. Lewis was quoted in a 2006 Knight Ridder syndicated article on the impact of disorganization. In it, Lewis describes the typical messy office worker who makes the common claim that he/she "knows where everything is."

"They may be able to put their hands on that invoice, but they are using a huge amount of their memory to keep track of where everything is," Lewis said. "That is brain power which they could use for another purpose."[2]

Don't believe it? Then consider this. Other organizing proponents have argued that a messy office is a career detriment. Whether or not you are being productive in your messy office (and nearly every expert on the topic would argue that you aren't), it's people's perceptions that matter. Whether it's staff visiting your personal office or customers walking through the company workshop, well-organized spaces suggest professionalism, efficiency, and decisiveness.

[2]Ibid.

Laura Stack sums up the argument for organization well in her list of five key benefits[3]:

1. Freedom from chaos
2. More flexibility & creativity
3. Higher productivity
4. Lowered stress levels
5. Less expense of money, time, and overall resources

An organized space means less mental capacity wasted storing information. Less mental waste means greater capacity for creativity. One study found the average office worker is interrupted every 11 minutes by a phone call, email or verbal interruption.[4] That's a whole lot of stopping and starting. When your mind is clear and focused you can be more flexible, responding efficiently and appropriately to these disruptions. All this leans to lowered stress and higher productivity. If time is money, organization means a whole lot more bang for your buck.

Common Tactics

We're not going to tell you how to get organized here in one short Blue Paper. That would be futile. Whole books have been written about the topic—and plenty of them aren't even all that useful. What we can do is summarize some of the most commonly suggested organizational tools and give you some resources for learning more.

- **Tickler File**

We dare you to find an office organization book that doesn't recommend a tickler file. What you need is 43 files—12 for the months and another 31 to represent each day. When something needs to be accomplished at a future date, you store a reminder in the appropriate file. Use the 31 daily folders for the current month, moving folders into the following month as time passes.

Use the tickler file to store an agenda you'll need for that meeting on October 8 and the football tickets for October 14. Use it to store reminders for projects you need to get started on at a later date. You can also store time-sensitive items that you're still considering—like whether or not to buy that new PDA before the special discount expires. Finally, use it for special occasion reminders such as

[3]*Leave the Office Earlier by Laura Stack, p 73.*

[3]*"Meet the Life Hackers," by Clive Thompson. New York Times Magazine, October 16, 2005. Viewed online at www.nytimes.com, August 8, 2007*

your assistant's birthday—one reminder the week prior so you can do some shopping—and another reminder the day of. Keep this on, in, or within swiveling distance of your desk and check it every day.

- **A, B, C**

The A, B, C, priority system is advocated by the folks at FranklinCovey™ and Day-Timer™ among others. You know the drill. You write out your to-do list, and prioritize your tasks with an A, B, or C. "A" signifies work that is the most important, "C" denotes projects that can wait. FranklinCovey not only recommends the ABC classification, but a sub 123 system as well, telling you what tasks to tackle first, second, third, and so on, under each classification.

This must work for plenty of folks, but David Allen (the productivity guru we referenced above) has some complaints. He thinks it's inadequate to deal with the volume and variety of today's workload. After all, it doesn't really accommodate emails, and all it really takes is one emergency customer request to undo your plans. Besides, let's be honest. When it comes to creative or mentally challenging projects, you need to work when the inspiration and energy hits—not when your pre-planned priority system says to.

- **Three Ds**

Do it, delegate it, defer it. That's an oft-repeated but over-simplified mantra for organization. The problem with the 3D model is that is doesn't tell you exactly what to do with those items you've deferred. (Back into your inbox, huh?)

Jamie Novak, an organization expert featured on HGTV's Mission Organization, modifies the 3D concept slightly. She advises people to take one of three actions whenever a new piece of paper enters their office: 1) toss it, 2) file it, 3) take action. Filing works best here if you have a tickler file in place. Otherwise you'll be filing items that need doing and then writing yourself reminders onto an ever-growing to-do list.

Laura Stack, doesn't just expand the 3D concept, she doubles it: Discard, Delegate, Do, Date, Drawer, Deter. Discard and Delegate are pretty clear. Do refers to those items you have time enough to complete immediately (like filling out a form). By Date she means using a tickler file, and Drawer means file. Deter

means stopping unnecessary mail, minutes, and routed items from crossing your office threshold in the first place.

If these still seem over simplistic to you, then check out Getting Things Done by David Allen. The man has a near cult-like following. (One busy artist is even selling a set of three David Allen buttons including one with Allen's photo in a heart next to the phrase "GTD 4-ever."[5])

Allen's directives for processing your "stuff" (his word) are best displayed in a series of workflow diagrams. It sounds complicated, but really it's just realistic and thorough. For instance, Allen recommends creating a "Someday/Maybe" file for ideas and to-do items you may want to pursue sometime down the line, but can't commit to right now. That keeps your "Action" folder clear for the really critical tasks. And, he suggests a "Waiting" file as a repository for stuff you've either delegated and need to follow up on, or stuff you can't complete until someone else has taken action.

Allen still advocates Dumping, Delegating, Deferring, and just plain Doing, but his system has a lot more depth and direction. It just might be the answer to keeping that inbox near empty, once and for all.

- **Lean Office & 5S**

Okay, Lean Office isn't so much a tactic. It's more like a philosophy, strategic plan, and organizational system rolled into one. Did you cringe on the words strategic plan? Yeah, Lean Office isn't for the faint of heart. It's an adaptation of the Lean Manufacturing concepts long popular in product production centers. You'll need a consultant to do it right. Expect to hear terms like "value streams" and "cost avoidance." However, when you're done, your whole office will not only be organized, but you'll have increased efficiencies, minimized interruptions and improved customer service. You will hum like a well-oiled machine.

One component of some Lean programs is a the 5S system. 5S is a Japanese quality control process which has been translated to English as Sorting, Simplifying, Sweeping, Standardizing, and Self-Discipline. Tools and files are given designated homes, standards are set, and then everyone works to sustain the environment.

At one area company, the in-house lean consultant has a specific place on his desk for his computer, telephone, coffee cup, and stapler. (We're not sure if he actually taped the areas off, but still—we know he's strict about it.) His project files are ordered numerically, one through 10. And when he is working on a project, only the materials for that specific job are on his desk. He's not the only one keeping it neat, either. The company set office standards and photographed work stations to record expectations. On unspecified dates, a department manager conducts an after-hours audit. Employees who are not adhering to the standards risk losing all or part of their monthly bonuses.

And that brings us to our next topic….

Personal or Policy?

It's one thing to make a personal commitment to organization, but you open a whole new box of paperclips when you implement an office-wide organization policy.

Such mandates are often referred to as a "clean desk" or "clear desk" policy. Melody McCabe is a professional organizer and owner of Office Efficient Systems. McCabe says approximately 25% of her clients have a clean desk policy—typically banks, medical facilities, and other places were personal client information must be kept confidential. One client even limits personal items to no more than three per desk.

These businesses generally document standard operating/organizing procedures and disseminate that information as part of the employee manual. Policies are in place to protect customer information, ensure files are accessible to multiple users, and provide organized company-access to resources such as seminar notes, manuals, and reading material.

Staff camaraderie can be another reason to clean things up. You've probably heard the studies that say the average American home is growing while the family shrinks, but did you know the exact opposite is happening in American workplaces? According to the International Facility Management Association, office space is shrinking. In 1987 the average executive had 291 square feet of office space. Today that's down to just 98. Of course, its not just executives feeling the squeeze. The average call center

worker has only 50 square feet to call his own.[6] We all know tight spaces can feed frustrations and animosity. So, keeping work spaces clean, even individual employee cubicles, can go a long way to maintaining goodwill among colleagues. (Don't even get me started on the animosity caused by messes in the break room.)

Of course, mandating clean desks can be a bit tricky. You'll likely raise a few hackles around the office, and you'll certainly hear from people who claim they need their mess to maintain creativity. So, how can you get your employees to clean up their act without packing their stuff up altogether? Hear people out, but stick to your request. If you work with sensitive client information, you have a clear defense of company liability. If some employees still balk, suggest a six month trial period and then revisit the discussion. Chances are they'll see the merits by then.

Here are a few suggestions to get a clean desk program going:

1.   Demonstrate Leadership Buy In
This goes without saying. A clean desk policy for some means a clean desk policy for all. Employees won't adhere to the rules if management is allowed to bend them.

2.   Outline Expectations
Decide what organized means to you. Do you want all papers filed by the end of every work day? Everything off the floor? No items extending above cubicle walls? No more than one work project out at a time? You may want to provide some training. Show people how tickler files work and suggest other filing options. You could bring in a professional organizer or highlight the various systems used by well-organized internal employees.

3.   Provide Company Support
Allocate resources so staff can get organized. This may mean extra shelving for staff common areas, new desktop filing racks, or even a couple hours of handyman work to put up storage racks, hang peg boards, and get your facilities

back in shape. If your workplace is really a mess, coordinate an organizing committee that identifies needs, requests resources and works toward gradual progress.

4. Hold Twice Annual Dumpster Days

Schedule organization days when employees can come in jeans and spend time purging files and doing other office organization. Plan to have extra large paper bins or mini-dumpsters on hand. A good time to plan these, says Allen, is right before the holidays when employees are already in party mode.

5. Provide Incentives

Let's face it, few people get excited about corporate mandates. Kickoff the program with useful tools like Cubicle Clips, the Translucent Pocket File, or the oh-so-portable Vortex™ Note and Flag Wallet (Allen recommends writing down ALL ideas and reminders floating around in your head to free up brain space.) Reward organized behaviors with gifts that will help them take the organizational bug home with them such as the Thule™ Console Caddy or Thule Go Box, or a magnetic Key Hook Organizer.

6. Consider Accountability

Many corporate offices are so serious about their clean desk policies that they've instituted surprise spot checks during after work hours. Decide whether or not this is right for you. If you tell employees they will be held accountable, be sure you are ready to follow through.

Being organized is not genetic. It's a skill that can be learned, practiced and eventually mastered. The methods you use can certainly be personal. Some people need paper file folders. Others are all electronic. Do some reading or consult an expert, try out a few systems and see what works best for you. Once you get there, you'll realize the benefit. A clear mind is invigorating. You'll feel better, you'll work better, you'll do better.

Recommended Resources

43 Folders blog
www.43folders.com

Getting Things Done by David Allen
Also www.davidco.com

Leave the Office Earlier by Laura Stack

National Association of Organizers
www.napo.net