



## Unit 3

## The Building Blocks of a Good Organizational System

### Learning Outcomes

**By the end of this unit the learner will be able to:**

- ✓ Share a personal vision and develop dreams and goals from it
- ✓ Apply the 80/20 rule and learn how it should affect planning
- ✓ Identify the characteristics of a good organizational system
- ✓ Develop a plan for an efficient workspace, including a customized information center and a filing system

## Unit 3

### The Building Blocks of a Good Organizational System

#### Pareto's Principle

Vilfredo Pareto (1848-1923) was an Italian economist and sociologist who made extensive use of math to analyze economic problems. One of his most famous theories is the 80/20 rule – the idea that 20% of situations dominate 80% of events.

This means that:

- Ñ 20% of your actions produce 80% of your results
- Ñ 20% of your products account for 80% of your sales
- Ñ 20% of the population holds 80% of the wealth
- Ñ 80% of software problems are caused by 20% of known bugs

#### Characteristics of a Good Organizational System

#### Test your knowledge

Consider your experiences with organizational systems and productivity tools. What works? What doesn't work?

Works	Doesn't Work

### **Building a Customizable System**

Different tools work for everyone. It's important to take the elements that work for you and incorporate them into a system that makes sense. For example, several productivity experts abhor to-do lists and feel that they should be abolished. Many other people would disagree.

Likewise, you may need custom elements for your particular work or life situation. A production office might have a matrix on a whiteboard outlining each item in production, its stage of development, and the person working on that stage. You might picture that and think, "Geez, I'd never make that work." Or you might think, "Hey, that would work great for my new project!"

Don't be afraid to borrow ideas, customize them, and try them out for a few weeks. If it works – great! If not, take what you've learned and try something else. You will find that your productivity needs will change with time, and your tools and systems will need to change, too.

## **Creating the Right Environment**

### **Garbage Out!**

Before we can start being more productive, we need to create the right environment. Earlier today, we learned how to get our minds in the right place. Now it's time to set up your physical space. Your first task is to clear your space of junk.

### **Step One: Gather Materials**

First, gather the materials that you will need:

- Ñ Marker and pen
- Ñ Notepad
- Ñ Sticky notes
- Ñ Garbage bag
- Ñ Two recycle bags, one for direct recycling and the other for shredding sensitive materials (mark them in some way)
- Ñ Three boxes labeled Sort, Store, Give Away/Return
- Ñ Extra boxes and bags
- Ñ Blank sheet of paper
- Ñ Timer

Place them all in one visible area where you will not lose them.

## Step Two: Make an Action Plan

Next, decide what area you are cleaning:

- Ñ Your office (which should include your purse or briefcase)
- Ñ A closet
- Ñ Your car
- Ñ A particular room in your house

If you are tackling an entire room, sub-divide it into smaller areas (i.e. desk, filing cabinet, scary pile on the floor). Number each area with a sticky note. You must tackle only one area at a time or you will get overwhelmed and you won't be able to finish the task.

## Step Three: Get Started

1. Choose a time where you will have several uninterrupted hours to organize.
2. Make sure you have all materials close at hand.
3. Write down a small reward on a sticky note. Set the timer for 30 minutes. Put the sticky note on it.
4. Place the three boxes and the three bags in the middle of the floor. Place the blank sheet of paper there also. This is where you will stack papers.
5. Tackle your first area. Put each item in the appropriate bag or box.
  - Ñ Make sure to separate bundles of papers.
  - Ñ Do not read papers or try to organize as you go. Simply place the item in the correct box, bag, or paper pile.
  - Ñ If you think of another task to be done, write it on your notepad.
  - Ñ Likewise, transfer any notes on scrap paper, napkins, or stickies to the notepad.
  - Ñ All areas should be empty of everything! Yes, this means a clear desk too!
  - Ñ When you fill a box or bag, put the lid on it or tie it up, set it aside, and get a new box or bag.
6. When the first area is completely empty, double-check! Nothing should be left, including:
  - Ñ All stickies decorating your area
  - Ñ All items taped or tacked up
  - Ñ All trays, file folders, and other organizational items (yes, we mean all of them – no exceptions!)
  - Ñ All calendars except the one that you use (set this aside)
  - Ñ All papers, including those inside filing cabinets
7. Work until the timer is up. Make sure to note where you left off.
8. Take your reward break. Try not to be gone for more than 15 minutes.
9. Return to your area. Continue to sort until all areas have been completed.
10. Take a deep breath and look around. The only thing remaining should be the bags and boxes. Stack these neatly and take a quick break. Congratulations on completing this step!

NOTE: In some cases, clearing out the filing cabinet might not be practical. If your filing cabinet contains items like reference documents ordered chronologically and indexed by year, you don't need to purge it.

#### Step Four: Finish the Task

Now it's time to finish what we started. Let's tackle the garbage bags first.

- 🗑️ Shred sensitive materials.
- 🗑️ Take out the trash and recycle bags.

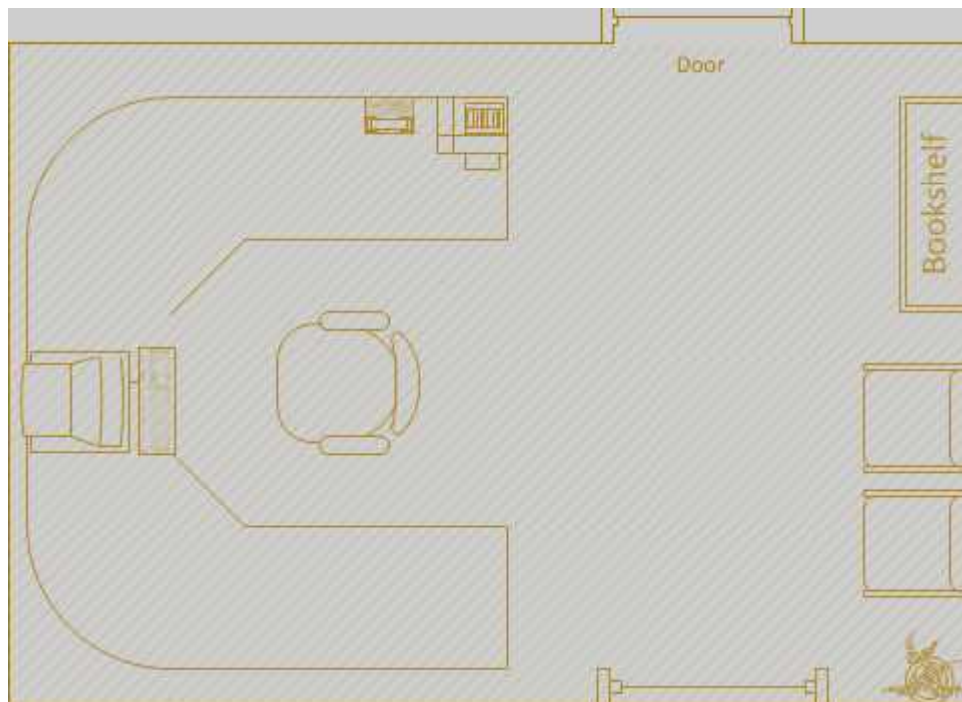
Now we have three boxes and one paper pile. Sort through the **Give Away/Return box**. Return any items that don't belong to you and take the rest of the box to a charity site. Do this now! (Get yourself a coffee while you're out, if you like.)

Finally, place the lid on the **Store box** and tape it shut. (This will prevent you from opening it later.) Put it in your storage space, a closet, or call your archiving company to come get it.

Now we just have our box of items to sort. Let's get our workspace organized first.

#### Laying Out Your Workspace

Now that you have a clean slate, this is a good time to arrange your workspace. Here is a diagram of our preferred layout:



We understand everyone may not have a workspace as large as this, or the ability to move furniture around. However, we'll list what we consider the most important features of a workspace. Implement whatever works for you to create a more efficient working layout.

### Desk

- Ñ Should be placed so that your back is to the door.
- Ñ Best shape is U, with the short part facing the wall. Computer typically goes in the inner part; phone, printer, and outgoing files go on the side facing the door; and a clear working area faces away from the door.
- Ñ Surface should be kept clean at all times! Exception: If you have a paper or electronic planner, you can keep that open on the surface while working.
- Ñ Tools should be placed in a drawer, not on the surface.
- Ñ Hang mementos on the wall instead of placing them on the desk surface.
- Ñ Trash and recycle bins should be tucked under a convenient part of your desk.

### Bookshelf and/or Filing Cabinet(s)

- Ñ Should be placed against a wall.
- Ñ Make sure you can open the drawers without hitting anything.
- Ñ Top surface should be kept clear. Exception: If you have a small desk, you can use the top for pending files, as we will discuss in a moment.

### Guest Chairs

- Ñ Placed together in a corner and/or against a wall.

### Greenery

- Ñ Place in a corner, on windowsill, or hang from ceiling.
- Ñ Can be artificial or real, depending on your office policy.
- Ñ Spider plants are easiest to take care of.
- Ñ Will give a bit of life to your office.

### Re-Designing Your Workspace

**Pull out your pre-assignment: a floor plan of your office.**

- Ñ Identify trouble spots in your office (i.e. places where things tend to collect or have collected).



**The priority tray must be empty at the beginning and end of every day.** Don't let it become a black hole!

### The Incubator

Also known as a pending file system or a tickler file, the incubator will keep all documents that require follow-up in one place. This file should be placed within easy reach but out of sight. A good place might be the top of a filing cabinet, or, if space is short, on a windowsill.

Here is what you will need:

- Ñ A hanging file holder
- Ñ 12 hanging folders
- Ñ 31 manila folders
- Ñ Felt-tip marker and a pen

First, label the hanging folders with each month in the year. Arrange them chronologically with the current month in front. Then, label the manila folders from 1 to 31. Put the folders for today until the end of the month in this month's folder. Put the remainder of the folders in next month's folder.

So, if today is February 12, my incubator will look like this:

- Ñ February
- Ñ 13
- Ñ 14
- Ñ 15
- Ñ 16
- Ñ Through to 28
  
- Ñ March
- Ñ 1
- Ñ 2
- Ñ Through to 12, plus 29-31 (as February doesn't have those days)
  
- Ñ Folders for April through to January

Now, file any items according to when you need to access it in order to complete it on time. So:

- Ñ A brochure that you need to review for a conference in June would be placed in the June folder.
- Ñ An invoice that needs to be paid by March 15 would be placed in the March 1 folder.
- Ñ A ticket for a concert on February 14 would be placed in the February 14 folder.

- Ñ Christmas gift ideas would be placed in the December folder. (It's never too early to start planning!)

At the beginning of each day, take the folder for that day. Review its contents. Handle anything that you can right away, and place remaining items in your priority tray. Place the date folder in the next month. At the end of the day, if there is anything left in your priority tray, re-file it in the incubator.

When the month ends, check the main folder for the next month and file any stray items by date.

If you don't have a lot of follow-up tasks, one hanging file folder might do the trick. However, we strongly recommend the incubator system. Try it for 30 days!

### Setting up a Filing System

Now, let's set up your filing system. We recommend setting up four types of files.

#### Overall Structure

First, decide on a main repository for the particular type of file. For paper files, this might be a filing drawer in your desk or a filing cabinet. For electronic files, we recommend keeping all files in an easy-to-access location like My Documents, the Documents library, or a folder right on the C drive.

Then, set up folders and sub-folders for both your paper and electronic files. Folders should be named according to a client, project, or task. Keep naming consistent in both electronic and paper systems. Here are some examples:

- Ñ If you are a marketing consultant, you would have folders for each client you work with.
- Ñ If you are a writer, you would have a folder for each book that you are working on.
- Ñ If you are an administrative assistant, you might have folders for the various managers you support, with folders inside each manager's folder.

Make sure to give electronic files a standard name. Don't include the date as this can easily be viewed when you are viewing the files. If you often use portable electronic storage, keep the names consistent with your main storage point and make sure to update the main files as soon as you are back in your office.

#### Active Files

These are items you access daily, such as a directory of phone numbers or e-mail addresses, standard operating procedures, and checklists.

**Electronic files** should be kept in your main storage point, with a shortcut on the desktop or another convenient location. **Paper files** should be kept in the filing drawer that is closest to you.

**Working Files**

These are items you access weekly or monthly, such as information for weekly reports or notes for monthly meetings. **Electronic files** should be kept in your main storage point, organized by project, client, or task. **Paper files** should be kept in a filing drawer within easy reach.

**Reference Files**

These are items you access yearly, like previous annual reports or active personnel records. **Electronic files** should be kept in a sub-folder of your main storage point named Archive or Reference. They should be organized into sub-folders according to client, project, or task. **Paper files** should be kept in a filing cabinet in your office.

**Archive Files**

These are items you do not access on a regular basis but need to keep for legal or tax reasons, like previous tax records or old personnel files. **Electronic files** should be kept in a separate storage point, such as a USB drive or on CD or DVD. **Paper files** should be kept in a storage point outside your office. Only keep what you absolutely need!

**Filing Tips**

Place folders in the drawer alphabetically and color-code your files by type. For example, you might have red folders for forms, yellow folders for tax information, and blue folders for financial data. (Use whatever colors make sense to you.) File information in a consistent manner, typically from front to back chronologically.

**Putting Everything Back Together**

We haven't forgotten about the Keep box in the middle of your floor, or the big pile of papers! You can file all of these items in your brand-new, organized system. You will need to make adjustments as you go. That's OK!

**Putting it in Action**

**What ideas do you want to try when you go back to the workplace?**

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**How will you customize the tools provided?**

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**What might not work for you? Why?**

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**What other tools will you use that we did not discuss here?**

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**What will be your first step?**

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**Outline an action plan for organizing your workspace and files.**

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## Setting Up Your Virtual Environment

### Organizing Electronic Files

#### Suggested Structure

We'd like to take a moment to talk a bit more about organizing your electronic files. It is vital that you are as meticulous with your electronic files as you are with your paper files. We suggest a structure like the following:



### Tips and Tricks

Operating system features may help you, such as:

- Ñ File properties
- Ñ Keywords and tags
- Ñ Search programs

### Making Your E-Mail Program Work for You

#### Process Overview

Your e-mail inbox should be like the priority tray on your desk: empty at the beginning and end of each day. We're not joking! Here is a simple seven-step plan to making your e-mail program work for you.



#### Commit to Your E-mail Program

Take a long, hard look at your relationship with your e-mail program. Are you happy with it? Does it serve your needs? Is it up to date?

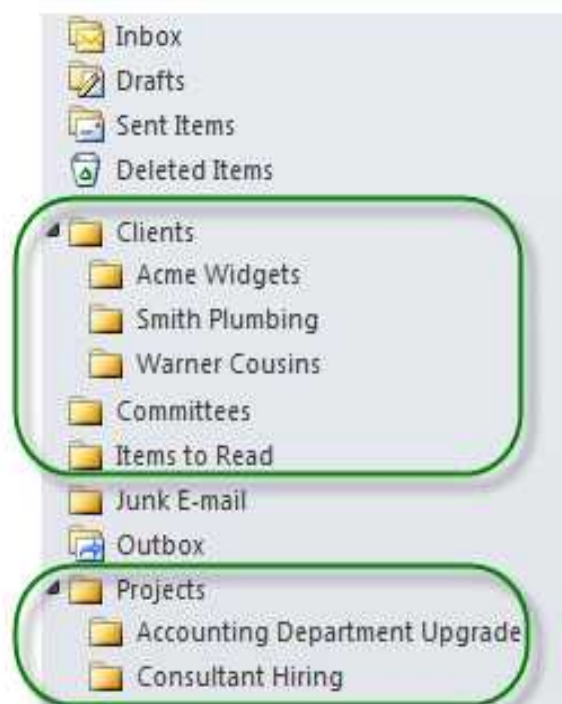
You might not have a choice about what e-mail application you use; check with your IT department if you're unsure. But if you've been longing to change applications or to perform a major upgrade, this is the time to do it.

### Take Some Training

Next, learn about your e-mail program. Go on a special course; pick up a book, take a quick online training session, browse the program's help file, or have an experienced friend show you the ins and outs. You'll be surprised at what your e-mail program can do for you!

### Set Up Folders

Now, set up folders just as we did on your hard drive. Here's an example from Outlook 2010:



Notice how files are consistently categorized and clearly named.

### Schedule Backups and Archives

This is the time to schedule a backup of your e-mail. This can be done through the e-mail program, in the operating system, or with a separate application. Make sure that backups are stored in a separate location, like on a DVD or on a USB drive. Store them outside of your office.

Most e-mail programs also support archiving: moving all of your e-mail out of the program into a separate folder. Typically, this is done once a year. Set this up now! If your e-mail program doesn't support this, put a reminder in your calendar to do it at the end of every year.

### **Automate What You Can**

Next, set up automation wherever possible. Some ideas:

- Ñ Set up rules to move messages from particular people or organizations.
- Ñ Microsoft Outlook features Quick Steps, which allow you to combine multiple actions into one clickable button and/or shortcut key. Take the time to learn about these, review the Quick Steps already configured, and configure your own if necessary.
- Ñ Configure your junk e-mail/spam and phishing filters to move suspicious messages out of your inbox. Be sure to review your junk mail folder periodically.
- Ñ Empty the recycle bin once a week.

### **Use Time-Saving Tools**

Other e-mail time-saving tools that we like include:

- Ñ Dynamic search folders
- Ñ Assigning reminders and flags to e-mail messages
- Ñ Customizable alarms and reminders
- Ñ Creating calendar appointments and tasks from e-mail messages (simply drag it from your inbox onto the calendar or into the tasks folder)
- Ñ Color-coded categories
- Ñ Message grouping (by conversation, sender, or date, for example)
- Ñ Marking a message as complete to indicate that you have completed required actions
- Ñ Quick access to folders via a Favorites pane
- Ñ Customizable navigation tools
- Ñ Address lists and contact groups

If you're not sure what your e-mail can do for you, pressing F1 typically opens the help file. Take the time to look for easier, faster ways to perform common tasks.



### Top Applications

In a March 2013 survey by Litmus Email Analytics, the top e-mail clients were:

- Ñ Apple products (42% of users)
- Ñ Microsoft Outlook (17% of users)
- Ñ Windows Live Mail (10%)
- Ñ Google Android (8%)

(Source: <http://emailclientmarketshare.com/>, accessed April 2013)

### Further Reading:

- ✓ Canfield, Jack, and Janet Switzer. *The Success Principles*. William Morrow Paperbacks, 2006.
- ✓ Covey, Stephen. *The Eighth Habit*. Free Press, 2005.
- ✓ —. *The Seven Habits of Highly Effective People*. Free Press, 2004.