

## CLEANING

# Crew

Four organizational experts share their field-tested strategies for creating order in the office

BY KAREN FRITSCHER-PORTER

If you've ever watched the organization show *Clean Sweep* on The Learning Channel, you know that it often takes an outside observer to give you the best ideas for organizing your home or office space. *OfficePRO* has rounded up several organizational experts who can help you create an office that not only looks neat, but enables you to find what you need when you need it to get your job done. Wouldn't you rather be clocking out at 5 p.m. rather than searching for that elusive report you need for a project due tomorrow? Re-evaluate your organization system with these tips from professional organizers.

### Live Clutter-Free

Barbara Hemphill is a professional

organizer and CEO of Hemphill Productivity Institute in Raleigh, North Carolina ([www.productiveenvironment.com](http://www.productiveenvironment.com)), author of *Taming the Paper Tiger at Work* and *Taming the Paper Tiger at Home*, and co-author of *Love It or Lose It: Living Clutter Free Forever*. A 25-year office organizing veteran, Hemphill swears by a random numerical filing system for paper filing, which she sells as part of *Taming the Paper Tiger* software ([www.thepapertiger.com](http://www.thepapertiger.com)). The software includes features such as templates for spreadsheets, forms, and reports and automatic data-transfer options. But if you're innovative, motivated, and have the time, you can create a basic similar system using software like Microsoft Excel or Microsoft Access, she says.

The concept? Label each file folder, binder, compact disc, book, or equipment with a random number. Then, in your software system or spreadsheet document, type that number and what it means using keywords (e.g. company name, contact name, topic, etc.). Then when you want the file, you do a keyword search on your spreadsheet or database, and up pops the information you need. Though this random numbering system may appear haphazard on the surface, Hemphill says it solves many common filing system dilemmas, such as filing company or vendor files with multiple name changes due to corporate merges; files that need to be



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SYSTEM FOR PAPER  
FILING.**

cross-referenced (e.g. the company on file is a vendor and a donor); files whose names may depend on the interpretation of the various people filing (Does auto insurance get filed as “auto,” “insurance” or “State Farm”?); offices with employee turnover (even a temporary employee on day one can do a keyword search to locate a file using this system); and file cabinets and storage cabinets in multiple locations (a keyword search for company

A file will tell you it’s in the cabinet in John’s office). Keep a print copy of the file directory in various sorted formats in a central location.

For electronic filing, Hemphill and her staff use and train others on a software program called Enfish (Enter, Find, and Share) that automatically indexes every electronic file you ask it to on your computer by every word in each file. To find something, you do keyword searches as



Barbara Hemphill



Eileen Roth

**EILEEN ROTH, OWNER OF EVERYTHING IN ITS PLACE IN SCOTTSDALE, ARIZONA, LIKES TO FILE BY CATEGORY. "I WANT TO GO TO A DRAWER, AND WITHOUT HAVING TO LOOK AT THE INDEX, FIND THE FILE I WANT," SHE SAYS.**

broad or narrow as you prefer. Update Enfish as often as you want with downloads from its site ([www.Enfish.com](http://www.Enfish.com)). A 30-day trial download is free.

When it comes to schedules and calendars, Hemphill says, "Half of any job is having the right tool. She prefers a paper calendar called Planner Pad ([www.plannerpads.com](http://www.plannerpads.com))—an 8.5-by-11-inch wire spiral-bound, half-inch thick planner. Each week is presented on a two-page spread divided into three sections. Hemphill uses the top third for fixed appointments, the middle

third for flexible appointments, and the bottom third for projects. A year-at-a-glance calendar is located in the front of the planner. That's where Hemphill puts one-word descriptions of nonnegotiable appointments; she puts more details at the individual date entry. Hemphill and her staff also include general entries everyone needs to know into an ACT! software database.

Finally, Hemphill offers a few clutter-clearing tips. Start with the mail, she says. "Today's mail is tomorrow's pile,"

Hemphill says. And "clutter is postponed decisions." She advises admins to use "FAT": File, Act, or Toss. She also recommends admins learn the art of "waste basketry." Ask yourself what's the worst possible thing that could happen if you discard something.

### **Categorize Everything**

Eileen Roth, professional organizer and owner of Everything In Its Place in Scottsdale, Arizona ([www.everythinginitsplace.net](http://www.everythinginitsplace.net)) is an office organization consultant and speaker who conducts workshops for conferences and onsite corporate training. She also is the author of *Organizing For Dummies* and creator of the desktop tickler system called Take Action File.

Roth likes to file by category. "I want to go to a drawer, and without having to look at the index, find the file I want," says Roth, who recommends creating an index as a backup system so that if you can't find the file you want, or you're going to create a new file and you want



Janet Barclay

## JANET BARCLAY, OWNER OF ORGANIZED ASSISTANT IN HAMILTON, ONTARIO, IS AN ADVOCATE OF COLOR-CODING BY CATEGORY.

to see if you have it, you do have a reference list. “You don’t need more than 10 to 15 major categories,” she says. “But you can have as many subcategories as you want.”

When you have about 10 different file folders, create a subcategory. “For instance, you may make travel arrangements for someone else. If that person hardly ever travels, all you need is one travel category with a couple file folders (e.g., airlines, cars, or hotels). But if you’ve got several bosses, you may need subcategories,” she says. Alphabetize within the categories, but don’t alphabetize the categories. That way, if you’ve got rarely used files in a category beginning with letter A, you can put them in the hard-to-reach bottom drawer and keep

the frequently used category that starts with letter V in the drawer above it that’s more convenient to reach. Also, write the names of the categories in a drawer on a label on the outside of the cabinet.

Electronic filing should match your paper filing system, Roth says. “If you have a ‘marketing’ folder in your paper files, you should have a ‘marketing’ folder in your electronic files with the same subcategories.” But don’t totally duplicate, she warns. You may have electronic documents that you don’t need in your paper files. For instance, if you routinely send out a confirmation or thank you letter to individuals, just keep an electronic template for re-use and only keep the actual electronic letters until the event is over. Then delete them. Or keep

your electronic airline tickets in an e-mail categorized folder and delete them after the trip. Likewise, if you do print a letter and file it, then go ahead and delete the electronic copy. An exception is for documents you know will change annually, such as a marketing plan or company goals, and you want to be able to edit it on an ongoing basis without recreating it each time.

In terms of schedules and calendars, Roth advises that “if you work for three or four bosses, or if you need to share your calendar, then you need to use an electronic calendar even if you’re using paper for yourself.” This also allows others to see your availability, and you can see overlapping appointments of multiple bosses. If your company has numerous outside clients, explore a contact management program (such as ACT!, TeleMagic, or Goldmine), which offers more options than just a calendar, such as writing sales notes or merging and sending letters.

If you don’t need the contact management features, then a calendar like Microsoft Outlook might be sufficient, she says. If you’re a paper person, you could use a paper calendar for yourself, but then you’ve got duplicate calendars, which can be dangerous, warns Roth.

An advantage of an electronic calendar is you can set a timer to go off 15 minutes before a meeting. You can also print a page of the calendar daily so you have an immediate backup if your computer system crashes. Otherwise, you or your boss may miss an engagement because you don’t remember it and can’t see your calendar.

You’ll never again use 80 percent of the papers in your file cabinet, Roth says. Keep items you must retain for legal, tax, or audit purposes plus items of historical value. Otherwise, pass the WASTE test:

- 1) Is this information worthwhile (fax cover sheets)?
- 2) Am I going to use it again (staff meeting agenda)?
- 3) Can I easily find this information somewhere else (another department)?
- 4) Toss (if no need to check with record retention) after asking, “If it has been here more than a year, will anything happen if I toss it, and will I need it ever again?”

5) Do I need the entire item (keep pages with notes only of proofs)?

### Focus on Files, Not Piles

Diane Hatcher, professional organizer and owner of Timesavers Business Services in Cooper City, Florida, ([www.timesaversusa.com](http://www.timesaversusa.com)), is a proponent of alphabetical filing using these rules and concepts:

1) The entire filing system should be alphabetical-based.

2) When you have groups of related files in file folders, type a category name on a plastic tab that attaches to a hanging folder and put the individually labeled file folders inside the hanging folder(s). These groupings of file folders should be in alphabetical order amongst themselves. The labeled hanging folder containing them should be in alphabetical order amongst the other category folders or file folders not part of groupings. For example, the category-grouping hanging-folder tab may say “credit cards” and within it are individually labeled file folders of credit card accounts.

3) Files that aren’t part of groupings or related files do not need category tabs and are placed in hanging folders filed alphabetically amongst the category tabs.

4) Category groupings can be color-coded, such as using green hanging folders for a “credit card” category and using red hanging folders for a category called “donors,” which perhaps contains individual folders of corporate donors. Once you’ve used a different color hanging folder for each “category grouping” in a “rainbow” order, repeat the same “rainbow” color pattern so you’ll never run out of colors, Hatcher says.

Hatcher suggests using an electronic filing system similar to the paper filing system. Simply learn how to use the electronic filing systems part of common software programs such as Microsoft Word. “Category files are made within the program to store related topics,” Hatcher explains. “Subcategories can be made within the categories, just as within the paper copy files.”

Hatcher believes that whether you use a paper or electronic calendar is a personal preference. What’s important is that you use your calendar consistently. Use only one calendar, if possible, to pre-

vent errors that can occur by forgetting to transfer information from calendar to calendar.

To keep clutter under control in the office, Hatcher says:

1) Have a home for everything and use it when done with items. Papers can go in trays or colored file folders labeled To Do, To Read, and To File.

2) Clear your desk before leaving work by putting things back into their homes.

3) Act on the motto “files not piles.”

### Incorporate Color

Janet Barclay, professional organizer, time management consultant, virtual assistant, and owner of the Organized Assistant in Hamilton, Ontario, ([www.organizedassistant.com](http://www.organizedassistant.com)), is an advocate of color coding by category. For instance, depending on the nature of your business, you may have five categories: customers, suppliers, finances, forms, and information. Your finance category might include green folders of individual income and expenses. Your customer category can include red folders of individual persons. Within each category, label folders and file alphabetically.

But what do you do with the odd document? “Don’t fall into the trap of setting up a Miscellaneous file or stuffing it with a loosely related topic,” Barclay warns. “Instead, place one unlabelled file at the back of each category section for filing ‘orphan’ items. Before adding something to this file, check its contents to see if there are any related items. Set up a new file whenever you have two or more related items,” she recommends.

“Don’t leave read messages in your inbox,” Barclay advises in regard to electronic filing. “If it were a printed piece of mail, where would you put it?” Delete read messages or move them to an appropriate electronic folder. Label paper files, e-mail folders, and documents on your hard drive or server using a consistent labeling system. Back up electronic files to a CD monthly or more; label the CD with back-up date; file back-up CDs together; and keep a copy off site. Then delete electronic files that aren’t currently in use because you can retrieve them if needed from the back-up CD.

Like many other professional organizers, Barclay believes that “a person’s choice of calendar system and the way they use it depends very much on their personality type.” But what’s a whole department or group to do? “The system that will be effective for a particular group will depend on the work styles of the individual group members,” Barclay explains. “However, one of the drawbacks of any group calendar system, from a simple chart on which each person writes his or her schedule by hand, to shared electronic calendars on a corporate network, is that if even one individual fails to update his or her schedule, the system is of little use,” she says.

For an individual, “record professional and personal activities on one calendar that you keep with you at all times, and you won’t arrive home at 5:30 p.m. only to discover that you missed a medical appointment at 5:15 p.m.,” she says.

To keep office clutter in check, Barclay suggests:

1) Clear all paper off your desk at the end of each work day.

2) Don’t print needlessly. Instead, keep electronic files well organized (and backed up) for easy access and reference.

3) Have a central filing area for general information shared by all members of a department to save storage space and individual filing time.

So which is the best way to organize your office? Clearly, every professional organizer has her favorite tips and organizing systems. In the end, though, it’s about what tips and system work best for you. What system will you and your coworkers not only implement, but use consistently? Create an organizational system that helps you and your professional peers find documents, items, phone numbers, etc. quickly. Free up more time to work on projects and spend less time helping others find things. And though it probably wouldn’t be in your best interest to continuously change organizational systems, you shouldn’t feel obligated to stick with any system or method that isn’t working.

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