

Organization Design

Five Tips to Clean Off Your Desk/Workspace

1. SCHEDULE a date and time with yourself (or several dates/times!). Write it on your calendar and keep this appointment, just as you would an important meeting with a client or a doctor.

2. PREPARE

Set a timer for the length of time you have decided to work on this part of the project.

Make signs or mark boxes with the following:

Current Paperwork (need individually)

Reference Paperwork (need individually)

Reference Paperwork (only need one per workgroup)

Reference Paperwork (only need one per workgroup)

Historical Paperwork (only need one per workgroup)

Reading

Data Entry (those business cards or scraps of paper that you need to put into your database, address book, or calendar)

Supplies

Have to hand box of garbage bags.

Have to hand pad of paper and pen (to write down anything you think of doing or to make a to-do list for later).

3. CLEAR and EMPTY

Set a timer for the length of time you have decided to work on this part of the project.

Take everything off your desk and out of your desk drawers.

4. SORT

Set a timer for the length of time you have decided to work on this part of the project.

Sort everything into the piles that you made signs for or the boxes you marked from number 2 above.

5. DECIDE

Set a timer for the length of time you have decided to work on this part of the project.

For each item in each signed or boxed pile DECIDE ONE of the following actions:

- a. Toss
- b. File hardcopy individually
- c. File hardcopy in one central area
- d. Scan and file individually
- e. Scan and file in one central area

Look at it each document you have kept and ask yourself:

Who does it belong to? Who needs it? What do I need it for? What's the date on it? When will I use it? When will I need it?	Where else can I find this? Why do I have this? Why do I want it? What is the next action, if anything, I need to take on this paper? (If nothing then consider tossing or scanning). What would happen if I tossed/shredded it? What's stopping me scanning and filing it as a soft copy? (Ask yourself 'Is this a good reason?') What's stopping me tossing it? (Ask yourself 'Is this a good reason?')
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Liaise with your document management/records rep on scanning processes, central hard copy filing, central soft copy filing, document disposal.

Ten Tips for Maintaining a Clean Desk

1. When you stop working on a project put it away.
2. Put date or calendar related papers/files into your tickler file as soon as they land on your desk.
3. Schedule regular reading time and put “to read” material in a reading folder.
4. Use a Desk Workbook to record all your notes, ideas, phone numbers, web site and email addresses, errands, and to-do’s. Do NOT use scraps of paper or sticky pads.
5. Schedule regular desk/workspace maintenance.
6. Schedule filing time and store your to-file in the corresponding date of your tickler file.
7. Make a frequently called numbers sheet and store under your mouse pad or inside a drawer or on your phone.
8. Create a soft and/or hard copy Pending Folder to store papers or files in that you are waiting for more information, someone else to get back to you on, or something you have ordered.
9. After sorting ONLY put back on your desk what you use daily, such as: pen, pencil, phone, desk workbook, computer.
10. Do NOT put back on your desk items that are seldom used and NOT used daily, such as: gadgets/toys, glue, scissors, hole puncher, ruler.