

getting organized



10

**Master the skills
you need in
ten minutes or less.**

**Management Series
Volume 6**

10 Minute Guide to Getting Organized

Publisher: Alpha Books

ISBN: 0028636139

Released: October 2000

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From The Publisher

This guide is based on the philosophy that organization is a skill and, like all skills, it can be learned. The author provides steps for creating systems that will save you time and labor, shows you how to keep your desktop clutter-free, helps you avoid procrastination and excuses, and introduces you to organizational tools that will benefit both you and your staff.

10 Minute Guide to Getting Organized

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Introduction

There is a definite beauty to being organized. The peace and symmetry that surround a well-defined piece of art or a well-written book are almost palpable. Developing systems to make your work life and home life function smoothly are worth every effort it takes, for that same reason. You maintain a calmer exterior, but what really counts is what's going on inside you. Becoming more organized leaves you the time to become more focused on getting the most from life. That leaves more time for your family, more time for pleasurable pursuits—just more time!

Years ago, Janet's husband gave her the book *Don't Sweat the Small Stuff ... And It's All Small Stuff* by Richard Carlson, Ph.D. Carlson's philosophy was startling—and it exactly mirrored the way that she felt:

"Our current level of stress will be exactly that of our tolerance to stress," Carlson says in the book. "We have it backwards in our society. We tend to look up to people who handle loads of stress."

Instead of finding ways to prove how much work we can take on, to show how much we can handle, and to crow about our stress levels, let's reduce it. Being organized cuts down on stress and makes us more productive, not lazy.

This book is loaded with tips, ideas, and philosophies on getting organized in the world of business. But because there are no longer clear lines between home and office—indeed, many of us work at home—we had to dole out a measure of both. You don't have to take on the whole book at once. A lesson read here, an exercise practiced there—it all adds up. Before long, you'll be handing out tips to friends and associates when you see how much better you can function.

It's hard to ignore the Internet today—in fact, it has helped add to the information overload. But there are some valuable tools out there, and we've added a few appropriate selections. We've also included products and pricings where we thought they would help. Obviously, the prices can change, but to know a range is helpful.

Lesson 1. Why Get Organized?

In this lesson, you will learn how being organized can change your life, both personally and professionally.

The Characteristics of an Organized Life

Since you're reading this book, it might mean that you're already somewhat organized and looking for more ideas and tools. Or maybe it means you're not organized, and you're trying to learn how to gain control of your life.

Either way, it's time to examine your thought process—and business processes—more closely.

An *organized* life begins with an attitude. That attitude is commonly characterized by self-confidence, which results in self-control. A confident person is one who feels certain of his or her ability to accomplish the personal and professional tasks in life, and who knows that a good method will be found to fulfill those tasks. In short, confidence equals control.

Plain English

To **organize** something means to arrange something into a united whole through systematic planning and effort.

Whether you're aware of it or not, you want greater control of your life. Therefore, you must examine your level of self-confidence, recognize and nurture the characteristics of organization, and experience the positive merits that result from that effort.

Where to Find Organization

Organization is as old as the human race. Without some form of social, political, and cultural organization in life, we would have chaos. When scientists and historians examine the construction of the Seven Wonders of the World, it is clear that a group of leaders was able to develop a process of organizing thousands of people into workgroups. It is in and through these leaders that the characteristics and related qualities of organization are to be found.

It appears that only in hindsight do we begin to examine the thought process of those greater leaders. Personally, you can't afford to let time and circumstance pass before examining your own attitude. To effectively make organized change you must examine your attitude.

Who Needs to Be Organized

All of us really need to be organized. But the inherent, social nature of human beings dictates that the onus for showing the way falls on the supervisors, managers, and owners in business; leaders in politics and culture; and parents at home.

CAUTION

Organization begins at the top. Otherwise, society would experience chaos and collapse.

The nature of our leaders' jobs dictates the reasons why they are organized:

- Supervisors and managers in the business world have the responsibility to accomplish the goals of their departments.
- Business owners must be organized if their ventures are to survive and earn a profit.
- Political and cultural leaders are assigned the awesome duty by their respective masses to organize the institutions they represent.
- Parents have the dream that their children will mature into thriving members of society. That requires a disciplined approach to organizing the children's educational and societal learning processes.

Only when these leaders, managers, and role models are organized is it possible for those people around them to reach their main objectives—success in life's goals. And for those of us not possessing the leader's responsibilities, organizing life should still be considered an opportunity for increased productivity and the related peace of mind associated with greater access to family, friends, and leisure time.

The Rewards of Being Organized

Imagine a person whose office is full of papers and pens strewn all over the desk and the credenza. This person runs around the offices several times a day, asking questions about when supplies will arrive and what time it is (even though he's wearing a watch), and never seems to have enough time to get work done. His tie is crooked, his collar is out of place, and he leaves the company bathroom with water splattered all over the sink.

You look in the car and see children's toys lying under the briefcase and papers stuck between the dashboard and the windshield. At home, clothes lay everywhere, and pots and pans never make it to the dishwasher.

TIP

Setting goals is an excellent way to begin changing your organizational habits. Write down three basic goals. Tape them to the bathroom mirror for an inspiring start to the day.

This is a scene that can be found in many offices and homes throughout the country. So often this person seems to be rushing to get somewhere, never arrives on time, and is already thinking about the next appointment or task before dealing with the one at hand. There's no sense of control in this person's life, nor feelings of serenity and self-confidence.

Books are written all the time about how to achieve peace of mind in an apparently chaotic world. Consultants make a living coming into your home and organizing it from what you wear to how your clothes hang in the closet. People always struggle to have free time with family and friends. And everybody wants to save money, but more of us use credit cards instead of cash. Maximizing worker productivity is always the premier goal of all supervisors; that requires the ability to influence others. And stable relationships with co-workers and family will always influence all other elements of our lives.

Getting organized means more than a straight tie and an empty sink. It can bring many rewards, including these:

- Serenity and peace of mind
- Clean surroundings at home and in the office
- More leisure time with family and friends
- More time to accomplish other endeavors at home or in the office
- More time to manage money
- More time to make money
- Increased ability to influence others
- Increased productivity
- Stable relationships at home and in the office
- A greater sense of confidence and self-worth

All these rewards in life can be achieved if you are organized.

CAUTION

Over time, you drain your energy with small annoyances, such as pulling a phone cord across the computer screen to your favored ear, or blocking a shadow from a lamp next to your dominant hand. Move them for better harmony.

The Characteristics of an Organized Person

One of the authors has a friend—we'll call him Tony—who's an executive vice president of a major international corporation. His accomplishments are impressive: He successfully opened additional company facilities worldwide, maintains a profitable local plant, and still has time to enjoy a harmonious and fulfilling home life. How can he possibly achieve so much? He is a classic example of a well-organized person and ...

- Is always well groomed
- Has a clean, organized home
- Is respected by family, friends, and co-workers alike
- Earns a good income, which he uses to plan for financial security and retirement
- Is self-disciplined
- Is rearing disciplined and achieving children
- Completes any task he begins
- Maintains self-control

TIP

Don't get discouraged if you don't have all the "traits" of a leader. You don't have to be born with them, but you can use them as inspiration.

The secret to this lifestyle is recognizing the value of discipline and the resulting rewards. Tony is a leader.

According to a report published by the University of Missouri, the personality traits of a good leader include the following:

- An outgoing style showing humor and warmth

- Persuasiveness in communication by speaking and writing effectively
- Persistent attitude, even in difficult times
- Patience to endure difficulty and allowing time for improvement
- Sensitivity to the emotions of others and a demeanor that encourages positive interaction
- Honesty and trustworthiness
- Communicative style that praises positive words and actions of others
- Positive outlook about today's problem and tomorrow's improvements
- Good listening ability
- Ability to realistically set goals
- Practical and progressive outlook when seeking ways to accomplish a task
- Preparedness through knowledge; cautious approach when unprepared
- Trusting and empowering approach toward employees

Tony and all the other successful leaders we have known in our lives possess these characteristics. Whether or not you want to be a leader, there is no doubt that most of us want to possess the attitude and characteristics of a good leader. Even if we're not leading others, we are always attempting to lead ourselves in the right direction, personally and professionally

The 30-Second Recap

- The need for organization is universal.
- Organization is an attitude that begins by convincing yourself of the need to get organized.
- That attitude grows when you learn what you can accomplish by getting organized.
- That attitude stays once you begin reaping the rewards of organization.

Lesson 2. Easy Organizing Basics

In this lesson, you will learn how to become a task master by identifying organizational problems and acting on them accordingly.

Getting Started

Every day of our lives is filled with tasks. Some are daily, such as brushing your teeth, taking a bath, and putting on your clothes. Others happen weekly, monthly, or less often. Examples include paying the bills, going to church, collecting a paycheck, or getting that annual checkup.

Finally those tasks for which, generally, we are not prepared. No one wants to think of going to the hospital. And, whether we anticipate it or not, there are those words from the mouths of our children, "Mom, Dad, I'm going to get married."

TIP

We need to be prepared for what the world hands us. Living an organized life helps prepare you not only for planned events, but also for the unexpected.

Where do we begin to get organized? Ground zero. Get out two of the most common instruments of organization—a pencil and paper. You are going to begin learning the basics of becoming a taskmaster. You can start with the essential formula for becoming organized:

Organization = Planning + Routine + Refinement

This may seem simple, but it does work.

TIP

Close the door and let the machine take your calls. Getting organized requires the time and space to concentrate.

Planning the Day Ahead

The best place to begin is at the office, whether at home or work. Get out that pencil and paper, and begin developing a task matrix like the following:

#	Task	Time	Due
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1	Open and respond to postal mail	30 minutes	2 p.m.
2	Open and respond to e-mail	30 minutes	10 a.m.
3	Give work assignments to staff	30 minutes	9 a.m.
4	Review daily work in progress	1 hour	4 p.m.
5	Plan staff assignments for next day	1 hour	4:30 p.m.
6	Plan monthly calendar	1 hour	1 p.m.

Fill in a list of all the tasks you are expected to start and complete every day on the job.

TIP

Determine the time that it usually takes you to start and complete the task. Then list the time of day by which the task must be finished; realign those tasks in order, beginning with the earliest time of day.

You have successfully developed a basic plan. Make sure to leave enough time between each task to allow you to finish in the order they are due. Also, leave time for the unexpected, as follows:

#	Task	Start	Finish
1	Give work assignments to staff 30 minutes	8:30 a.m.	9 a.m.
2	Open and respond to all mail 30–45 minutes	9 a.m.	10 a.m.
3	Plan monthly calendar 1 hour	10 a.m.	11 a.m.
	OPEN 2.5 hours	11 a.m.	1:30 p.m.
4	Return phone calls 1 hour	1:30 p.m.	2:30 p.m.
	OPEN 1 hour	2:30 p.m.	3:30 p.m.
5	Review daily work in progress 30 minutes	3:30 p.m.	4 p.m.
6	Plan staff assignments for next day 1 hour	4 p.m.	5 p.m.
7	Update your to-do list 15 minutes	5 p.m.	5:15 p.m.

Now you have created time modules to complete known tasks, as well as those that occur on a less frequent or emergency basis.

CAUTION

You may be required to submit a weekly report to your supervisor every Friday. Don't wait until Friday to write, edit, and submit it. Make time *every day* to begin developing that report.

That "last minute" routine only defeats the purpose of everything you are trying to do—get organized, become more productive, and gain more time to do other things.

Creating a "To-Do" Template

Take your task matrix to your computer, and design a personalized "to-do" list template form. Print out a few blank sheets at the start of each week. Make a habit of filling it out every afternoon before you leave.

When you arrive at work the next day, you're geared up. You don't have to spend time visualizing the day ahead because you're already in motion.

Plain English

A **habit** is a pattern of behavior acquired by repetition. Psychologists and behavior experts say that it takes about 20 to 70 days to form a new habit.

Refine Your List

Begin refining your "to-do" list every morning. Practice using it. Keep the list with you throughout the day. You'll want to determine whether tasks are being started and completed as scheduled.

Problems may arise. You may have two or more tasks that must be completed by the same time every day. Soon, learning to prioritize will become a habit.

TIP

Try giving your tasks a priority level, such as A, B, and C. If you have two A priorities, choose A1 and A2, and so on. You obviously can't do them all at once, so this will add order to what may seem like chaos.

Repetition of your routine will allow for refinement. Trust your abilities to prioritize and schedule your obligations. Your boss wouldn't have put you in that position if she didn't believe that you could accomplish the tasks.

Still Have Problems?

If you still can't complete the tasks in a timely fashion, don't panic. It will take some time, especially if you're not a naturally organized person. There are ways to solve the problem:

CAUTION

To **delegate** means to assign authority or responsibility to another.

- **Delegate—**

If you have subordinates, do they appear to have more free time than you? You might be able to assign some of your tasks to them.

- **Get proper training—**

Do you rely on others to help you finish certain tasks? Ask for or get additional training in weak areas, such as computers.

- **Turn off the noise—**

It's easy to get distracted by the problems of others, telephone calls, and even impromptu meetings. Set your schedule (with flexibility built in) and make it clear to colleagues.

- **Put in quality time—**

Are you getting to work on time? Are you putting in the number of hours expected of your position? Make the most of it by being organized.

An asset of good organizational skills is the ability to identify problems and act on them accordingly

Put Technology to Work

The beginning of this lesson was devoted to incorporating simple organizing habits into your daily life. Technology has done a lot for us in terms of providing tools for organization. These tools are not that difficult to implement, either, once you decide what you need.

Computer Filing Systems

Most of what you read and write for your business is stored somewhere, in a physical, paper version (or hard copy). It should also be stored on your computer. Try to label both using the same protocol—for example, client files can be arranged alphabetically in your paper system, Alvarez, Brown, and so on. Try to do the same on the computer:

- Name your main computer folder Clients. In your physical office, Clients would be the label on the file drawer.

- Name the subfolders under Clients in your computer with client names. Let's use Brown, Alice as an example. Under Clients, you could name a folder Brown, Alice. In your filing drawer, Brown, Alice would be a hanging file of its own.

Each new document for Brown would be labeled with a date system—for example, Brown, Alice 72800 for a July 28, 2000, document. You could create a new subfolder by month or by topic, depending on the nature of the work.

As an example, the file Brown, Alice would look something like this in your computer:

Drive: C

Folder: My Documents

Folder: Clients

Folder: Brown, Alice

Folder: July

Document: Brown, A 72800

The July 28th document is about five levels down, or five clicks down, in your computer files from your C drive. Now you can easily put your hand on both the hard copy and the electronic file.

Backing Up

The best filing system can be quickly destroyed by a computer virus or a power strike. Protect your files by backing them up. A backup is a copy of your computer files stored on either a disc, a tape, a CD or the network server.

Backing up your computer files is simple and takes very little time. Your computer software will guide you through the steps. You can decide when, where, and how the computer backs up your files. Get your system in place and stick with it.

TIP

Create two sets of backup disks. Swap them out so that there is always one full set of backup disks. Store them offsite, such as in a safe deposit box or in your home.

There are two kinds of backups:

- **Full backup—**

Full backup means just what it sounds like: You back up everything on your computer. Create full backups in accordance with how much and how often the data changes in your files. You can set the computer to do a daily, weekly, or even monthly full backup.

- **Selective backup—**

Selective backups are useful if you are working on only special sections at a time. You can select entire drives for backing up, or you can choose individual files and folders. Selective backing up should be done on a daily basis.

Create a System

Label and number your disks, CDs, or tapes in advance. We'll call them Set A and Set B for the sake of example.

Pick a day, such as Monday or Friday, to begin your backup cycle. Insert your Set A, and select the drives or files necessary for a full backup in your backup program. Do this again with Set B. Now you have two copies. Take Set A offsite for the week.

Insert Set B daily to perform a backup of selected files, those used most often. These will automatically become a part of the full backup.

At the week's end, bring back Set A and perform a full backup. Take Set B offsite for the week (it's fully up-to-date already). Repeat the weekly process.

You'll never have to fear a loss of data greater than one day's worth if you follow this system. Damaged or lost files can be easily restored, using the backup program's restore feature.

TIP

You can back up your files on the Internet. Some Web sites offer free space; others charge annual fees in the \$100 range. Two top picks in 2000 by *PC Magazine* were <http://www.connected.com/> and <http://www.xdrive.com/>.

Cleaning Up Your Hard Drive

Clutter creates stress and wastes time. Computer clutter may be confined to the central processing unit, but it can be just as debilitating as an untidy office. There is probably junk on your computer that you don't even know about. That's why uninstaller utilities such as Norton's CleanSweep by Symantec or McAfee's Clinic can prove invaluable for getting organized.

Once installed, these programs go through your computer system and help you delete unwanted junk and duplicate files. They will remove orphans and redundant DLLs, and even tidy up the files that hang on after you've been Web browsing.

Begin implementing some of the concepts introduced in this chapter slowly. As you incorporate them into your daily life, you'll find that it's not taking more time, but less, to get things done.

The 30-Second Recap

- Create personalized task lists.
- Schedule time blocks to complete tasks.
- Build flexibility into your day.
- Plan for tomorrow today.
- Identify problems and take corrective action.