



IB owner Dan Marcus
of TDC Consulting, Inc.

By Dorothy Simonelli

Look around your office and see if you relate to what Maridee Piercy, office manager of Liepert & Son, a printing equipment and foil embosser company in Beaverton, OR, describes. "Our files were stuffed and paper overflowed from the file cabinets onto our desktops and chairs. Things were everywhere and we couldn't find sales receipts — or much else for that matter."

Chances are you have a similar problem. Paper — a mountain of it — is the informational lifeblood of a small business.

IB owners need a paper management system to ensure optimum efficiency, productivity, harmony, control, order and profitability. But after a second look around your cluttered workplace, you may wonder how to get organized.

Piercy hired professional organizer Susan Hurlbut, owner of Organization Plus! in Clackamas, OR. "She came in, interviewed each employee to assess work styles, identified problem areas, then customized each work station," says Piercy. "Together we set up a great system. That was several years ago and things continue to run smoothly."

You don't necessarily need a pro, though. If you follow some basic steps, you can develop your own paper control system.

GETTING STARTED

Problem: Small business owners often waste 20-45 minutes a day searching for some item on a desk.

Solution: Sort and organize to create a clear desktop workspace.

Begin by removing everything from your desktop and drawers. Place on a nearby table or the floor.

Non-Paper

Separate the non-paper items (stapler, writing instruments, checkbook, clips, etc.) into piles, keeping similar things together.

Replace essential desktop items only: telephone, Rolodex, pen/pencil, calendar, appointment book or day-type planner and one in-basket. Decorative items

(such as framed photos) go around the edge of your desk.

Consider putting a computer or typewriter on an adjacent desk or table to maximize desktop space. Decide on placement of other items according to function and frequency of use. If used:

■ Daily/several times a week — place on or in your desk.

■ Weekly — place within reach or in a desk drawer (put small items in a drawer organizer).

■ Twice a month — store within reach or in a cabinet in the room.

■ Monthly or less — store outside the room or in a supply area.

Throw out useless or broken items.

"I have the clearest desktop of anyone I know," says IB owner Dan Marcus of Chicago, IL-based TDC Consulting, Inc., marketing and management consultants for foundries and related metals industries. "I have a telephone, a notepad, a calendar, one mechanical pencil and a carafe of water on my desk. My computer sits on the work table behind me."

Paper

Separate paper supplies: envelopes, stationery, forms, note and message pads. Store large quantities in a supply area. Place small amounts in a drawer or above-the-desk shelves for accessibility.

Sort all other papers into temporary piles by categories such as *to do*, *to pay*, *to computer*, *to buy*, *to file*, *to read*, *to key employees*, keeping all the related papers together.

Be tough. Throw out paper. Ask yourself: Do I need it now? Is it a financial/legal record? Is it valuable to an on-going project? Is it replaceable?

WORK IN PROGRESS

Problem: Paper ends up in piles, not files.

Solution: Convert your sorted temporary piles into working files.

Marilyn Bodine, administrative assistant at L.S. Hadley & Associates, manufacturers' representatives for commercial kitchen equipment in Seattle, WA, eliminates desk piles by using files. "I place each customer order in its own file and keep them vertically by my desk until the

job is completed. Then all the pertinent paperwork goes to a filing cabinet.”

Take a pile of your papers, perhaps *to pay*, and put them in a labeled file folder. Continue this process for all the remaining piles.

There may be several projects in your *to do* pile. Create specific project names; put all papers into separately labeled file folders. Allow yourself one red to-do folder for phone messages and other daily tasks. Make folders for each one of your key employees. Place the red *to do* folder and the key employee folders in a desktop vertical file holder.

Put the remainder of your working files into a large desk drawer equipped with hanging file rails and vertical hanging files. Track your working files by using plastic tabs to label the hanging files from 1-31 plus one that says *next month*. Then put each of your working folders into a hanging file corresponding to a day of the month.

For example, if you decide to pay bills on the 15th, put the *to pay* folder into hanging file #15. Mark *pay bills* on the 15th of your calendar. Go through and place your other folders into numbered files, always recording the dates on your calendar. Add to these numbered files as new tasks develop.

Finally, prepare your daily to-do list. Prepare a simple form numbered 1-20. Check your calendar, dated working files and desktop red file to compile your daily to-do list. Include work on any long-term projects. Put your high priority jobs at the top of the list and cross them off as you go. Schedule a block of time to process in-basket paperwork.

Use the last 15 minutes of your day to clean your desk and plan your next day's list, including incomplete tasks or long term projects.

NOW FOR YOUR FILE CABINETS

Problem: File cabinets often become the dead zone for paper storage.

Solution: Start thinking of files as an information retrieval system and then revamp them.

Move completed tasks from your working files into active files in a file cabinet. These files hold selected papers you'll retrieve for information or add to during the year.

Label your file cabinet drawers by broad categories such as *financial* and *resources*. Label file folders and hanging files by subcategories such as *receipts*

• *Taming The Paper Tiger: Organizing The Paper In Your Life* by Barbara Hemphill (Kiplinger Books; \$11.95 plus \$2 shipping) is clearly written and full of practical ideas. (800) 544-0155.

• *Organized To Be the Best! New Timesaving Ways To Simplify And Improve How You Work* by Susan Silver (Adams-Hall Publishing; \$13.95) includes illustrations, charts and chapter resource guides. Available at bookstores or through the publisher, P.O. Box 491002, Los Angeles, CA 90049. (800) 888-4452.

• *Clean Up Your Act! Effective Ways To Organize Paperwork And Get It Out Of Your Life* by Dianna Booher (Warner Books, Inc.; \$9.95 plus 95 cents shipping) is divided into 100 concise, easy-to-understand sections. Available at bookstores or through the publisher, P.O. Box 690, New York NY 10019. (212) 522-7200.

The video, "How To Organize Your Desk" by Susan Hurlbut, is a unique 30 minute problem-solving presentation. Its excellent how-to approach features four different small businesses as examples. \$49.95 plus \$3.50 S&H. Order from HTO Enterprises, P.O. Box 1703, Clackamas, OR 97015. (800) 225-8755.

"What Is A Professional Organizer?" is a pamphlet published by the National Association of Professional Organizers, 655 North Alvernon Way, Suite 108, Tucson, AZ 85711. Send an SASE for a free copy.

"How to File and Find It" is a helpful 64-page booklet available free from the Quill Corporation, 100 Schelter Road, Lincolnshire, IL 60069. (708) 634-4850. Fax (708) 634-5708. Request item # HT4.

• *If You Haven't Got The Time To Do It Right, When Will You Find The Time To Do It Over?* (Fireside, \$8.95) by Jeffrey J. Mayer is a bestselling book offering a time-management system guaranteed to save you up to an hour a day. It shows you how to organize your desk, your files and even your to-do list so that you work more efficiently. Call (800) 223-2336.

and *tax forms* for the financial drawer. Create a file index to correspond with the category/subcategory system.

Inactive (closed) files are records that you must keep, but use infrequently if ever. They belong in the rear of your file drawers, or in other remote locations for storage. Outdated records belong in the trash.

"We have numerous catalogs listing 50,000 advertising specialty items and premiums our customers can order," says Joseph Suchecki, owner of Uni-Serv Advertising, Inc. in Belmar, NJ. "Our index lists where each catalog is filed, so our six employees can easily locate the proper catalog for each order."

Susan Silver, author and founder of Positively Organized in Los Angeles, CA, has a guide for revamping your system:

■ Categorize any existing files as *active* or *inactive*; remove the inactive files and store them.

■ Write down your filing system categories and subcategories. Get input from others who'll be using the system.

■ Physically set up the system. Have all your supplies on hand as you prepare the file labels and purge, consolidate and arrange the file folders.

■ Put the finishing touches on your system. Label drawers and prepare a file index or chart for yourself and others who have access to the system. If others

are involved, introduce the system at a special training meeting.

■ Maintain your system by sticking to a routine.

MANAGING THE FLOW

Problem: After reorganization, you must manage the paperwork that travels across your desk.

Solution: Several times a day, use a four-step system to process and route in-basket papers.

Use one in-basket to receive all your mail, phone messages, letters to sign, reports, etc. (otherwise your entire desktop is an in-basket). Handle each paper *once*, taking one of the following actions.

1 Put it into one of your working files. Avoid a "pending" file — decide now where it goes.

2 Refer it. A small business owner cannot do everything; delegate tasks. Use a sticky note for instructions, put the paper into an employee file folder and deliver the folder after emptying your basket.

3 File it. It doesn't require further action, but you need the information. File it into an active file.

4 Toss it. Half of what comes across your desk can be thrown out. **IB**

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