



# TriMetrix®HD Organized Workplace

# Organized Workplace

*Systems and procedures followed for success. Careful organization of activities, tasks and projects that require accuracy. Record keeping and planning for success.*

## Why is this behavior important?

Have you ever misplaced something really important? It's not a good feeling is it? And have you ever put something away for safekeeping and then been unable to remember where you put it? Do you find things you were looking for weeks or months after you needed them? Have you missed meetings because you just forgot about them?

Most everyone has experienced these moments in their lives. None of us are perfectly organized all the time. But I'm sure you know some people who never seem to forget appointments, always seem to be able to find important paperwork quickly and have neatly organized desks. How do they do it? How do they minimize the amount of disorganization in their lives?

Some people are naturally more organized than others. But the majority of people who seem organized have actually taught themselves to maintain good organization habits. They weren't born with them. To have an Organized Workplace you have to get into a mindset where you think of yourself as an organized person:

- Stop yourself before you throw notes into a pile on your desk.
- Make a point of getting to appointments on time.
- Return phone calls promptly and keep a record of important discussion topics.

It is essential that you keep disorganization to an absolute minimum. To be successful, you need to be able to keep a well-organized workplace in which papers, electronic data and other information are neat, orderly and easy to locate. One of the best ways you can do this is to reserve time regularly, at least once a week, to work on organization. Clean off your desk, update your to-do list and check to ensure your appointments are all listed in your planner.

Beyond making time for organizing yourself, you have to have a system for organizing yourself. The most organized people take full advantage of the tools at their disposal. They use electronic filing systems for e-mails and other electronic files, they have systems for keeping track of contact with customers, and they have a manageable filing system in place for keeping up with papers. The most organized people keep their desks clean because their filing system works for them, not against them. To become a superior performer in a job that requires an Organized Workplace, you must learn how to become more organized, keep up with the pace of the job and be as efficient as possible.

## What are the skills associated with Organized Workplace?

Someone who has characteristics associated with an Organized Workplace:

- Has the ability to locate paperwork, information and data rapidly and efficiently.
- Is well-organized with regard to meetings by being prepared, prompt and productive.
- Utilizes organizational systems, such as computers, PDAs, planners, etc., in a way that optimizes effectiveness.
- Has an efficient filing system based on clear logic ensuring old paperwork is archived or thrown away and new paperwork is easily accessible.
- Has an efficient system for promptly and effectively returning phone calls and e-mails.

## How do you develop your own abilities in Organized Workplace?

- Start with your desk. File, throw away or create a new file for every piece of paper on the desk.
- Establish in-boxes for major categories of paperwork that come to you or for key individuals you work with regularly.
- Keep a single to-do list where you won't lose it and can refer to easily. Categorize your list's items as daily, weekly or monthly to-do items. Use your planner pages, write your action items on a white board in your office or do whatever else works. Update this list daily or more often if needed.
- Empty a drawer and use it only for personal paperwork and files.
- Dedicate time to organizing your filing system. Be careful about what you keep. Try to be objective and throw away or recycle anything irrelevant. For items you do keep, create logical folder titles and store them in your file cabinet in a logical order.
- Color code your files to make it faster to find information.
- Don't overstuff folders or overload filing drawers. Throw out old or useless information or make secondary sub-folders for essential information.
- At the end of each project or event, organize paperwork and file or store it.
- Use storage boxes to store dated files if you are required to archive them by law or by your organization.
- Pre-sort mail you receive. Immediately throw away any junk mail.

- Immediately prioritize any top-priority items.
- Purchase magazine boxes to store booklets, magazines and/or catalogs you want to keep but don't keep them forever! Go through your magazines regularly and dispose of them. Since some publishers offer compilations of each year's journals/magazines online or on a CD, consider how much space you can save.
- Take full advantage of the filing system on your computer. Use clearly named folders to file documents, e-mails and other information.
- Empty your workspace of all but the project you're working on to cut down on distractions.
- Use a call manager software or calendar program that allows you to keep notes about your phone calls.
- Promptly follow up on messages and keep them until you have done so.
- Tidy and clean up your desk at the end of each day. Make time once a week to re-organize yourself, deep-clean your desk and update your to-do list.

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## Activities

### Activity 1: Observation

Think about the people with whom you work. Are there people who are always disorganized? People who seem to shuffle around their desks looking for papers, always return calls days later, and write notes on little pieces of paper and stuff them into their planners?

- How effective are these people?
- What kind of a reputation do these people have?
- Have they ever lost important paperwork or data?
- Are they the go-to people on important projects?
- What impression do you get from their desk?
- How stressed or un-stressed do they seem?
- Do they forget appointments and/or run late often?

What do you think these people's disorganization has to do with how you answered the questions above? Would your answers have been different if the people had a different workspace? A cleaner desk? A more organized method of keeping notes and papers?

### Activity 2: Implementing

Look back at the notes you took in the earlier part of this lesson and refresh your memory on the tips for implementing a better filing system. Then, work to implement one of your own by following the steps listed below:

1. Buy/obtain file folders and labels.
2. Go through items on your desk and file relevant ones while throwing away useless ones.
3. Color code file folders if it will help you. For example, if you have accounts payable and accounts receivable, you may want to color all accounts payable folders red and all accounts receivable folders blue.
4. Remove and throw away or archive any files that have been inactive for more than two years.
5. Breakdown overstuffed files into smaller categories.
6. Keep files related to personal records in a separate place away from your business files.

1. If possible, turn your desk or work away from traffic.
2. Organize your paperwork into three categories and get a file folder for each:
  - Action
  - Information
  - Reading
3. Get three in/out boxes and label them as follows:
  - In
  - Out
  - Reading
4. Every time you receive a piece of paper, place a dot on the upper right hand side. Do your best to only handle that piece of paper one time. When you see one with multiple dots, expedite it away from your work area now!
5. At the end of every day, clear your desk for the next day. Place all papers either into one of the three files (Action, Information or Reading) or into one of the three boxes (In, Out or Reading).

