



BECOMING MORE ORGANIZED

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Some people stalk organization like a big game hunter in the jungle. My boyfriend, I acknowledge, is one such person. He's a self-professed totally disorganized slob. He wears that description like a badge of testosterone-dripping honor. I must admit that I find it rather amusing when he spins around in circles in total frustration trying to find his coat, hat, keys, phone and so forth. When the resulting wasted time makes us late, however, I am no longer amused. It was during one of those moments when I had a little epiphany about organization.

His problem, I noticed, had to do with the fact that he never knew where he left something, and therefore he could never find it. If he always put things away in the same place, he would know exactly where to look. That's what I've always done, and I can attest to the fact that it works.

What I've come to realize is that it doesn't really matter *where* things are kept, as long as they are kept there consistently. Well, ok, location matters a little, because if the location is one which is difficult to access, or requires that items placed there must be frequently moved out of the way, then consistency in that case presents an inconvenient obstacle.

Some people are naturally organized. I recall when I was a child of about 4 years old; explaining to my mother in detail how I liked my clothing organized in my drawers, so that when she put away my clean laundry I knew where to find it. (Yes, she DID find it adorable. At least at that age.) Over the years I have had friends come to take care of me when I have been incapacitated. They were always amazed when they'd ask me where they could find something, and from another room I could direct them to the exact cabinet or drawer, and describe something's exact placement relative to other items in the drawer or cabinet. It was all about simple consistency.

I was a smoker for over 22 years, and in all that time never misplaced my lighter or cigarette case. If you are or were a smoker, you know that is an achievement. I've never left behind an umbrella, or even a pair of gloves. And I

rarely if ever lose something in the office. On the rare occasion I do, it eventually shows up stuck to something else. (That's why I personally detest sticky notes and use Outlook's notes instead.)

It's all about organization. And organization is all about consistency.

My boyfriend has been placating me by hanging his coat in the closet when he arrives, rather than throw it on any nearby piece of furniture. I ask him to stuff his hat and gloves in the pockets, and then hang the coat. I even gave him his own designated hanger in the closet. Whenever I need to remind him, he rolls his eyes and sighs. But he acknowledges that even though he can't manage to ever actually close the closet door, he has not lost track of his coat, gloves or hat since he agreed to put them away in the same place consistently. He isn't aware that I have introduced the tiniest smidgen of organization in his life. But he is enjoying the resulting benefit.

So let's talk a little about your office. And maybe we can get you a little more organized. First, let's deal with all non-client "stuff". Here's how I do it.

If you don't have a scanner, I recommend you get one. I have tried (and thrown away) many scanners over the years. I have been using the Fujitsu ScanSnap! for a number of years now, and it is standing the test of time. Another good choice is the Xerox DocuMate 152. They are equal in price, although this new Xerox model comes bundled with more software, and a larger (50 page versus 25 on the ScanSnap!) automatic document feeder. I can recommend scanners for higher volume, but these two are small, inexpensive, and idiot-proof to use. Plus they're fast and reliable.

Every article of interest or stray piece of information is scanned and stored electronically. If I think I may have to put together printed handouts, the paper(s) is placed in an appropriate physical file folder based on topic. Magazines are reviewed upon receipt based on a quick flip-through. First I look at the title. If there seems to be value, I read any pull-quotes, and sub-headings just to be sure. Usually by that time I know if it is something to keep or toss. Once in a while I must actually read the first and last sentences in paragraphs to determine whether to keep or toss. So an article takes just a few minutes at most to evaluate. If worthwhile, I rip it out, scan it, and then go on. (Well, I guess I should mention that some I read in total on the spot because they are interesting. But most are saved for access as needed.) When done I toss the remaining magazine in the trash.



I have my physical files arranged much as I do my electronic files. I have broad categories for articles, resources, and projects. Within articles and resources I have additional broad categories such as human resources, financial management, marketing, technology, ethics and so forth. Both the physical paper and the electronic copies are filed with long explanatory names.

Scanning information is not helpful if you can't easily find it later. My scanned electronic copies are fully indexed and searchable. I use Copernic Desktop Search Engine to find, aggregate, view, print, and copy / attach items when necessary. You may like this, or X1, or for larger firms, "real" document management like Worldox or Interwoven. When I get a hot line call regarding compensation schemes, for example, a simple search on the word "compensation" brings up every document that contains the word anywhere within or in the title or filename. It even highlights the word wherever it appears, and in the bottom half of the window I can view the file without opening it, to save time in determining which one(s) meet my needs. I can copy, print, and do other functions in Copernic without even opening any documents.

Firm business records need to be similarly organized. If you are trying to manually aggregate your information at year-end, you are totally missing the boat. My business records are well organized. Unpaid bills, client checks, deposits, taxes etc are all entered into QuickBooks and filed in an appropriate folder as soon as possible. I can't remember the last time I lost something I needed. And my ability to go back and quickly locate and review historical information is invaluable and a great timesaver throughout the year.

Year-end tax planning is simple. I send a backup copy from QuickBooks for each of my business ventures, plus my household affairs, electronically to my accountant. She and I talk on the telephone, both reviewing the numbers on our computer screens, and decide what actions to take for year-end. As soon as the bank reconciliations are done in January, I send the final backup copies off to my accountant for tax return preparation. I'm already spending my refund about the time most people are just signing their returns.

When it comes to client files, I am just as consistent. All client files are opened as soon as the signed engagement agreement comes back. Only then do I schedule initial meetings. Everything about a client's assignment is stored electronically. Most communication is done via email. That which comes by fax arrives on my computer, instead of a fax machine. Whatever comes by mail is scanned in.



At the client's office, I normally take notes on my laptop. When that is not the case, I must transcribe. My choices are to dictate and use voice-to-text to convert it into typed notes, or manually type it in. I just ordered a digital pen which will enable me to upload handwritten notes and store them on the computer. Plus it comes with handwriting-to-text recognition software. Since my handwriting is pretty good, I anticipate it will do a good job of converting. Why convert to text? Because then the Copernic desktop search engine can be utilized to zero in with pinpoint accuracy when I am searching for information.

Client files are never put away without a reminder being put into the computer for the next task. Sometimes that's just for a follow-up contact in 6 months if the project is completed. But that then reminds me to put a task in the computer for destruction of the client's project file in a year. (Of course your retention time will vary and be considerably longer for client files.)

The bottom line is that you can get better organized. All it takes is consistency, a few simple tools, and a methodology. Once you start to let things pile up, instead of putting them away where you can easily find them later, you are facing the downward spiral of defeat in your battle against disorganization and chaos. What you will find is that you may initially spend a little more time dealing with items as they arrive. However, the savings of time in not touching things multiple times before they arrive at their ultimate destination, and of being able to find anything within a few seconds, more than compensates for the initial expenditure of time. Organization saves time you are currently losing chasing things. But more importantly, organization is calming. Knowing where things are, and knowing you are able to put your hands on them easily and quickly, takes away a lot of stress in a hectic, harried work or home environment.

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