

Designing Workspace Solutions

In this short course you will find out how to get a grip on your workspace -- wherever it may be -- and turn a mountain of wild paper into a mole hill of manageable information.

The Workplace: Then and Now

Although 1960s-era futurists envisioned technology that simplified our lives, the reality is that technology has, in many ways, made life more complex. Fax machines, copiers, desktop computers, printers, scanners, and all manner of other machines have crowded the workspace. Meanwhile, rents are rising, and Internet connections, laptops, cell phones, and other gadgets have made it easier than ever to work away from the traditional office cocoon.

Workplace 2007

The truth is that, as a nation, we're increasingly moving away from traditional office environments to home offices and mobile environments. Consider: In the past few years, the number of telecommuters has grown by 59%, the home office segment has grown 69%, and mobile users have grown by 64%. Three to five percent of all U.S. workers have flex schedules. (Wall Street Journal) 31 percent of all U.S. households have a home office. (Wirthlin Worldwide Study) 21 million workers take home some of their work every day. (Bureau of Labor Statistics) As workers, many of us want mobility, flextime or part-time hours, the ability to telecommute. Office managers are crunched for space and dollars. Add those facts to the statistics above and you begin to come up with a new vision of what it means to "go to work."

Changing Habits

Stop for a second and ask yourself a few questions:

- Do you think your workspace is too small?
- Do you find it harder than ever to manage the flood of paper generated in the course of your day-to-day job?
- Do you ever work away from the office?
- Do you worry that a workspace flooded with paper undermines your colleagues' confidence in your work and professionalism?
- Do you ever go home with a full briefcase?

If the answer to any of those questions is "yes," you're in luck. Designing Workspace Solutions offers you some easy-to-implement and easy-to-maintain ways to help you get a handle on your work and your time, and promote an efficient, professional image -- no matter how limited or mobile your work environment. In the next few sections, we'll discuss practical tips for:

- Creating an efficient workspace
- Identifying your short-term needs
- Identifying your long-term needs
- Maintaining your workspace

Let's get started.

More on Organizing

This short course covers some basic organizational strategies. For more in-depth information on handling paper and filing, check out the *Take Control of Your Desk* short course.

Clear the Desks

Whether you work in your home, a traditional office, or a four-foot cubicle, the key to being productive and efficient in today's changing work environment is taking control of your physical workspace. This means that one of your first tasks will be coming to terms with your most immediate challenge: your desktop.

Your desktop is full of stuff: your computer, your phone, papers, wires, sticky notes, picture frames, pens, pencils, tools like staplers, notebooks, and reference books (just to name a few). Do you really need it all? Sorting through and organizing your desk may seem like a daunting challenge. But you'll find yourself organized and more productive in no time if you follow these three simple steps.

Step 1: Make Some Piles

Sort everything on your desk into these four rough batches:

- Keep it on my desk
- Keep it in the room, but not on my desk
- Route it elsewhere
- Toss it.

As you sort, remember these desk organizing rules:

- Only keep frequently used items on your desk.
- Do not put papers back on your desktop. Piling or leaving active paperwork on the desk encourages distraction. If you prefer piling as an organizational approach, be sure to use the [PileSmart® product line](#).
- As you work, organize any papers you remove from your desk into rough categories -- customers, vendors, banking, insurance, etc. -- and temporarily file them in storage boxes. Because these files are temporary and you will soon re-file them, you should use boxes even if you have file drawers.

Step 2: Create a Quick Audit System

If you're in doubt about the usefulness of items that you keep on your desktop, use an audit system. Put a dot on each item when you use it. At the end of the month, remove items that do not have a dot from your desktop. Put them away in a drawer or file cabinet, donate them, or toss them. The goal is to keep your most frequently used supplies within arm's reach to maximize efficiency.

Step 3: Establish an Inbox

Every time you acquire a new piece of paper, you should decide whether it goes into the inbox for attention or into the trash. Here are the rules of engagement for managing your inbox:

1. Place the box adjacent to your trashcan. Create a routine to review the contents at least once daily.

2. Toss junk immediately.
3. Date-stamp all incoming mail that you keep.
4. Separate papers that require your attention from those that you need to file.

The Calm After the Storm

When you're done, your newly pristine desk will probably hold:

A telephone
A laptop or desktop computer
A three-ring binder with dividers and pockets
A notebook
A stapler
Some pens and pencils
At least one file drawer, box, or portable system
A day planner or appointment book
A Rolodex or telephone contact book

What about everything you put in the temporary file boxes?

You need a way to keep your active projects on hand while still maintaining a professional, organized appearance. To do that you'll need a good understanding of your needs, and a few habits that will help you stay in control over the long term.

Tips for a Clutter-Free Horizon

Keep only essential items on your desktop.
Work actively to eliminate clutter.
Keep frequently used supplies within arm's reach.
Use labeling for identification.

Secure the Cargo

Remember the paperless office, that dream of the early information age? Well, it never materialized. Instead, information technologies have sent paper consumption skyrocketing. In 1991, U.S. users consumed about 5,000,000 tons of paper. By 1998, that number had risen to about 8,000,000. Experts now say that the typical office worker consumes between 5,000 and 10,000 pages of paper a year. That means up to 10,000 pages worth of clutter moves across your desktop a year. This in turn means that much of the challenge of designing an effective workspace solution for today's offices involves coming up with efficient ways of dealing with documents.

We already talked about establishing an in-box. That box, plus the daily habit of separating the materials that need your attention, date-stamping them, and throwing away the trash, are a critical part of your document management routine.

But what about the rest of that paper -- those other 10,000 pages? You need to find a way to deal with it. The 80/20 Rule Paperwork tells a story. What story does your paperwork tell? What information are you sitting on? Most people use only 20% of their files, so the other 80% may

belong in the trash rather than a library. At the very least, many of them can be stored deep in an archive, away from your active workspace and your easy-to-access reference materials.

Break It Down

In the new office environment, there's one refrain that should dictate your organizational techniques:

"Near, farther, farthest."

Active papers stay near, less active papers are farther, archival papers are farthest. You gain efficiency when current papers are at your fingertips and separate from the files that you keep for reference and are less likely to use on a daily basis. You may keep these reference files farther away from you -- across the room or down the hall. You also have other files that you may need sometime, but you can't imagine when. Those files live the farthest away, possibly even off-site.

Dividing Lines

When you cleared your desk for the first time, you created temporary file boxes categorized into rough batches by subject like customers, vendors, banking, and insurance. Now it's time to start getting a firmer grip on those rough batches by establishing a set of categories that will help you set up and maintain an organizational system:

- Hot: Papers that require your immediate involvement
- Current: Papers that require your near-term involvement
- Reference and archival: Papers that are resting
- Garbage: Papers that are useless or obsolete

Coupled with good maintenance habits, these categories will help you establish a workable filing system. When creating a space-efficient filing system, be sure to consider the maximum number of files you may need in your immediate workspace, and be sure to plan a system that allows you to shift files from "hot" to reference material whenever necessary. Let's take a closer look at what kind of paper really falls into each of these categories.

Garbage

We'll start with the easy stuff. For this, you'll need a trashcan. Whenever you're in doubt about whether or not to keep certain papers, consult your boss, your attorney, or your tax advisor. Rules vary slightly from state to state and for various types of businesses. For the most part, though, you want to keep only what will truly be useful. You can toss any files that are definitively useless or obsolete in this can.

Now, on to the rest!

Hot

Everyone has urgent paperwork like bills and important communications. These documents truly need your immediate attention. These documents should live at arm's reach, each with its own dedicated folder in a "hot file." A desktop file or project file box is a perfect hot file because it offers easy access to these papers. Whenever you want to work with the files, all you have to do is reach out and move the hot file across your desk. Because your hot file will hold your most

important documents, your filing system needs to work for you and fit well in your workspace.

Consider the following as you choose the right organizer for your hot files.

A desktop file houses your papers attractively, with file folders upright and labels visible. These sorters also provide a way for you to set up a small tickler file. Place items that you need for meetings or phone calls into folders labeled with each day of the week. As each day passes, move its file to the rear during your end-of-the-day personal planning session.

Project boxes offer the same benefits as desktop files, but they handle greater volumes of paper. They also offer portability and keep files more private.

Horizontal workspace organizers (their larger cousins are called literature sorters) make a good choice if you have space. This flat file storage option is also a good choice for people who must repeatedly utilize the same printed forms.

Acrylic file wallets travel well. A project or report can fit neatly inside and go to a meeting, rest on your desk, or reside in a drawer when not in use. If your briefcase is your desk, these files are good option for you.

Current and Reference

Anything that isn't garbage and doesn't belong in the garbage can falls in the less exciting but generally more populous "current" and "reference and archival categories." While it's fairly easy for everyone to set up a garbage file and a hot file, establishing an organizing scheme for the documents in these categories has as much to do with your workspace as it does your workstyle and general approach to organizing, as you will find out next.

Label It

Always label your files. Otherwise, you -- and anyone who works for you -- will have difficulty accessing your papers and maintaining what you have worked so hard to set up. Label binder spines, file folders, or any materials you work with. Get creative. You can even color-code your files.

Clear the Clutter

Create more space on your desk and become more productive. A product such as the [Pendaflex Get-A-Grip](#) is the perfect solution. The patent pending self-grip cover attaches to any smooth surface and provides instant access to important documents while freeing up valuable room at your workspace.

Setting -- and Staying -- the Course

Okay, now you've dealt with your trash and your most urgent files. However, you also need a system for accessibly filing other current projects. By taking a few moments to assess your access and storage needs, you can determine which strategies will work best.

The Right System for Your Workstyle

Before you lift a file folder, take a few moments to answer these questions:

- Which is more important to you: capacity or portability?
- How often and how quickly will you need to reference your stored documents?
- How much protection do your documents need, now and down the road?
- How long will reference documents need to be stored?
- Do you need to store several types of media in one location?
- Do you deal with confidential documents?
- How much dedicated workspace do you have?
- How accessible do reference materials need to be?
- What's your personal sense of aesthetics?

If you telecommute, work from home, or travel a lot, you require extreme mobility. Maybe you need durability. Maybe you're responsible for important documents that require protection from loss and damage, or documents that need to be stored so that they are not easily viewable.

Whatever your needs, answering the questions above will help you address them strategically and give you the information you need to buy and utilize the best set of organizing tools.

Organizing for Mobility

If you find yourself commuting through a lot of wet weather, you might want to consider file folders created especially to repel moisture. You'll be sure to show up at every meeting with crisp and dry documents, even if you can't say the same about your clothes. If you do a lot of out-of-the-office research, you may often find yourself lugging piles of rumpled papers from the library back to your home office, where you have to flatten the papers before Xeroxing and distributing your research brief. In that case, an expandable file might solve a few of your transport problems and allow you to hand out crisper, less battered-looking documents.

Planning for Capacity and Longevity

If you have papers that are not in active use but must be kept for some length of time, you'll want to archive these records in a safe environment. You should choose sturdy boxes created for this purpose. They are well worth the nominal cost because they are designed for structural integrity, close tightly, and stack well. If handling the weight of these boxes will be challenging, smaller boxes give you the same features and are more manageable.

Taking Advantage of the Space You Have

If you have a dedicated desk and at least some available floor space or shelving, you have several options for managing reference files: If you have the floor space, configure your workspace into a U, L, J or H shape, all of which allow you to spread out and still keep all your materials within arm's reach. You can set up these configurations by arranging file cabinets or shelves adjacent to your desk (on the sides or behind your chair). You sit inside the U, on the crossbar of the H (with a credenza, low lateral files, or bookcases behind your chair), or inside the J or L bends. If you have shelves available, reference binders and magazine boxes can be very useful, especially if you have a number of projects or frequently referenced library materials. Along with labels, employ the colored spines as part of an at-a-glance reference system. As a bonus, this system adds a pleasing, professional-looking appearance to your workspace.

Establishing a Routine

Without good work habits, all the organizational systems in the world won't get you organized. The following tips will help you stay organized once you get there.

- The first time you handle a document, presort it for further action.
- Time- and date-stamp each document.
- Sort documents for further action as you handle each one.
- Make a note of the last time you handled a document on the document itself in pencil.
- Get into a routine of clearing and organizing your desk at the end of each workday. The five or ten minutes you spend each day can save hours later on.

Are you afraid your new workspace solutions won't stick? Don't be. U.S. Supreme Court Justice Oliver Wendell Holmes once said:

"A mind that is stretched to a new idea never returns to its original dimension."

By the same token, a workspace that has been knocked into shipshape never returns to its original dishevelment.