

Setting up a Workstation *Tips to an Operational Office*

By Chris Perrow, Perrow Systems

Your Desk: the single most important part of your office

1. A desk is any type of furniture that is utilized as your primary workspace.
2. List what you need to have at your fingertips on a daily basis: telephone, computer, pens, pencil, etc. Remove everything else.
3. Placement: if right handed, put phone to your left. This leaves your right-hand free to take notes.
4. Open space: Even if the majority of your work is done on the computer, it is imperative to reserve an open writing surface. This would preferably be to the right of your phone. Anchor this habit by using a desk blotter or taping out a space. Ask others not to put papers in this space.
5. Now, place the other 'daily need' items.
6. A comfortable chair and good lighting are essential.
7. Survey the piles you removed in step 2. Sort into use categories as follows: several times per week, once a month, never or where did this come from.
8. Items that need to be accessible several times per week should be incorporated into your desktop or main drawer. Any remaining supplies should go in a cabinet, closet or box. Be sure to label the contents.
9. Remember: the more you use an item, the easier its access must be.
10. A cluttered desk is counter productive. The sensory overload makes it extremely difficult to focus. Your brain becomes stressed and exhausted.

Your Daily Paperwork Handling System:

1. Sort the remaining papers and items into similar groups:
 - Paper scraps with phone numbers, appointments, etc.
 - Action type items: bills, files on active projects, correspondence
 - Problems, indecisive action, etc.
 - Reading material: books, magazines, catalogs: Sort as personal or business. Toss what is unnecessary.
 - Extra supplies, equipment, personal items.
2. Start with your action type items that you have grouped. These items determine how to personalize your daily paperwork system.
3. List the basic categories you could use for everyday paperwork, such as:
 - Bills
 - Calls to make
 - Calls expecting
 - Errands

- Correspondence
 - Computer entry
 - To be filed
 - Pending
4. Remember: this is personal and specific to your needs
 5. Set up your system. Keep it simple, based on the categories that you devised above. Decide the 'tools' you need to get started on an 'action file': drawer, box, file crate, etc. Try to use what you have on hand. The supplies are not the system; they are only the tools.
 6. Label the containers and/or files with your categories.
 7. Try to keep as much as possible off your desk but still easily accessible.

The Right Tools:

1. An 'In Box' to place papers you have not yet handled. The OHIO rule needs to apply here: Only Handle It Once. If you pick it up to sort, place it where it belongs. Clutter (or an overflowing in basket) is postponed decisions.
2. A place to put frequently used files: File drawer, desk drawer, desktop file holder:
 - Permanent Action Files (ongoing files)
 - Temporary Action Files(current projects that will end)
3. A place to put reference files: additional desk drawer or cabinets
4. Hanging file folders with plastic tabs(letter or legal, dependent upon your current system)
5. 'Box Bottom' files if you tend to have thick files.
6. Hanging file frames if your file does not accommodate.
7. Manila (or colored) files to use in hanging files and/or take with you.
8. An 'Out Box' if you send papers elsewhere, within easy reach. Vertical files work on wall space.
9. A 'To File Box' located within your reach.
10. Labels for everything.
11. Many trash bags.

File Basics

1. There are three basic types of files:
 - Action: as discussed above
 - Reference: these files contain information you may need to access at some point in the future
 - Archives: These files will probably not be needed but must be kept due to your retention guidelines.
2. A file index is a list of the names of all the files in your system. This helps in your file retrieval and avoids duplication of files.
3. File Maintenance musts:
 - Schedule a weekly block of time for filing
 - Clean out your files once per year
 - Add and delete files as necessary. Be sure to update your file index

- Label everything.

Before you dive in:

1. WARNING: This task will make it look worse before it looks better. Plow ahead, anyway. The results feel wonderful.
2. Start with small chunks. Give the first assault about an hour. Plug away daily from that point.
3. A cluttered desk is counter productive. The sensory overload makes it extremely difficult to focus. Your brain becomes stressed and exhausted.
4. Try to set your system in place over a period of a few days.
5. Aim to have no more than one paper file open at any given time.

About Chris Perrow:

Chris Perrow designs organizational systems that fit the nature of the individual, department or company, helping people perform at their peak while maintaining order and flow. As President of Perrow Systems in Silver Lake, Ohio, Chris conducts training for time management, lean office, productivity, change management, leadership, and employee development. Perrow is a member of the National Association of Professional Organizers (NAPO).

Chris holds a BA in psychology from Muhlenberg College. She has helped clients like Kent State University, Akron Metropolitan Housing Authority, Office Max and SummaCare. to achieve new productivity through new, lasting process training Contact Chris at Perrow Systems at 330-686-0282 or by e-mail at info@perrowsystems.com, or view her website at <http://www.perrowsystems.com>.