

A high-angle photograph of a cluttered office desk. The desk is covered with stacks of papers, a multi-line office telephone, a blue folder, and various other office supplies. The wall behind the desk is covered with numerous sticky notes and papers. A person's hand is visible in the upper left, reaching towards a stack of papers. The overall scene conveys a sense of disorganization and information overload.

SHELF CONTROL

Does your office make you think of an unknown mutual fund with all kinds of stuff collected from different places? Or perhaps your filing system looks like it has been running without a manager for quite some time? If you are uncomfortable, frustrated or dispirited about your lack of organization, **Cherri Hurst** offers some ideas to help you get the best returns on your organizing efforts

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here are no benchmarks when it comes to organizing; each person has a different level that he or she is happy with. One person's clutter is another person's comfort, so don't go by anyone else's definition but your own. You expect your client to invest according to his personality and, like with investing, the same can be said about organizing. But if you're finding that a lack of systems and organization are causing you to lose things constantly, become frustrated on an ongoing basis or avoid having people in your office, then perhaps it's time to do something about it.

Make the time

The best way to get started is to schedule some time to get organized. If you think that someday you'll sort out all those emails or enter all those addresses into your contacts list, it will never happen. Someday never comes. In the same way that someone cannot start their financial planning without making an appointment with you, you cannot start your organization plan without setting some time aside to do it. Write it in your day timer, fix it in your mind and consider it every bit as important as any other appointment you would make.

Get-rich-quick schemes do not work in investing or organizing. Do not plan to spend a whole day at it that sees you getting it all done in one shot. Organizing is work. It means making a lot of decisions and it's tough to keep going at longer than a few hours without a break. It is much more realistic to understand that it will take a number of small sessions to get things on track. This way, there is less risk of your organization plan falling apart and the costs can be minimized.

Where you start your organizing odyssey depends on you. If you are tackling your office, then start by working on a small area within it. The principles you use when organizing your space are a good basis for organizing other areas of your life. You will find the knowledge that you have gained, not only of your stuff but also of yourself, very valuable when you are ready to organize anything else. It's like getting to know a company before investing in it.

Purge, purge, purge

Go through each item deciding what it is and if you should keep it. There are two potential pitfalls in this step that can bring the best intentions to a screeching halt. First, there is no sense in organizing things you do not want or need. Ask yourself questions that will help you decide if the item goes or stays. When was the last time you used it? Does it work? Do you need it? Do you like it?



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Investigate the item as you would a fund manager. Avoid keeping anything that you think you *might* use some day but you have no thoughts on what for. Don't "wait to get even" on something you have purchased but never used. Realize the mistake and move on.

Second, do not fall into the trap of trying to decide where things should go at this point. Only decide if you are keeping it or not. Have the garbage can, recycling container, donation box and shredder handy so items can be dealt with right away. A word of warning: it gets worse before it gets better. (Where have you heard that before?) Do allow yourself some pictures and memorabilia to keep your space friendly and comfortable.

Sorting your stuff

Now sort the items that are left. Put like with like, as in commodities, only in organizing they are more commonly called categories and subcategories. Office supplies, instruction manuals and reference material, for example, can be sorted into their specific categories. Any paperwork you find at this stage should be put aside for the filing system that you will create when you have finished organizing your office.

Here is where you develop an organizing plan. Now that you know what you have, you can assess what you need in the way of organizing tools and supplies. This can include anything from shelving to file folders. A common mistake that people make is to buy containers and furniture before they know what they have. That's like investing in a company and then finding out about it.

Everything in its place

Determine where items will go. Start with the big things like your desk or filing cabinet and then move down to where you are going to put your pens, paper and other office supplies. Store and organ-

ize items according to how you use them and how you work. Keep items used most often close. This is the part where you learn about yourself and your work habits. If you feel you want everything on your desk, it's time to diversify. Use all your available space, including hidden areas behind your door or under your desk.

After each organizing session, take time to clean up. Shred items that need it and empty the shredder into the recycling. Empty it and the garbage. Move donation boxes and items that don't belong in your office to their appropriate places. Stepping over bags of garbage, recycling and things you don't want any more just defeats everything you have done. The organization is not complete until these have been cleaned up. Take time to feel good about what you have accomplished and congratulate yourself on a job well done.

File it

Whether you have one drawer or 20, a good filing system will help you find and return items quickly and easily, not to mention help you keep that newly organized office in good shape. Paper is the slowest thing to organize so, again, understand that this will take time. The first steps to establishing a filing system are the same as the ones you took to organize your office. Schedule, purge and sort. Now you will be putting the paper into categories and subcategories. Put these into temporary files labelled with pencil or just into piles with post-it notes, depending on the space you have to work in. There are times in organization when it is necessary to break some rules. This would be the case when it comes to the records you are keeping on each client for compliance requirements. Records such as telephone conversations and meeting discussions are best kept by date, within the category of each client.

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Once this is done, or at least on its way, you will have an idea of how much space you will need for your filing system. Are you going to need a four-drawer cabinet, two drawers or just one in your desk? Are you using legal- or letter-size files? Should you go to the detail of colour coding your files? Regardless of what you decide, you should at least invest in file folders, hanging files and plastic tabs with inserts. Once you have purchased your supplies, you are ready to actually label the files and the tabs and put them away. As with the rest of your office items, store the files you use most often closest to you. Use obvious separations to help make things easier. For example, all client files could go in one drawer or cabinet. If you have to keep your personal files in the same area,

keep them separate from your business ones using this principle.

The next place that might need to be looked at is your email inbox. By this time, you already know the "company" and how the manager works so you can use that knowledge to get all that correspondence organized. Those same steps apply to organizing your office and you can use the same technique to create a system with your inbox as you did for your files. Imagine that each email is a piece of paper. Decide if you want it, determine categories to put them in and create folders to hold them. Try not to duplicate what you have in your paper files. If you are confident in your computer's stability and you back up on a regular basis, then don't print out items that you are keeping on your computer. Do not create rules for messages to go into certain folders automatically unless you are sure you will read them right away.

Getting organized is a very personal experience and depends a lot on your individual needs and habits. It requires honesty, self-awareness and flexibility. You don't have to be willing to toss everything in sight, but you should be ready to accept a certain amount of change. How much change depends on your circumstances and the end result you want. Different people have different levels of organization that they are comfortable with. After all, the main objective in getting organized is to make you comfortable and therefore more productive, less stressed and more professional. Your clients will see you as the blue chip in the stock of financial advisors. **F**

CHERRI HURST can be reached at cherri@hurstclass.com.