



By Josh Spiro | June 22, 2010

How to Organize Your Workspace

Business opportunities can easily get lost amid piles of papers and disorganized hard drives. Here's how to structure your time and space more productively.

Whether it's business plans or business cards, conference binders or marketing copy, entrepreneurs have a lot of information to keep track of. When you're running around like a chicken sans head, it's hard to put a tidy workspace high on your priority list. Even if you can afford a personal assistant, that won't necessarily solve all of your organizing problems.

One obstacle to getting organized as an entrepreneur is that a lot of organizing advice sounds intuitive and even obvious once you hear it. But there's a broad gap between a back-of-the-mind comprehension and successfully implementing strategies for getting organized.

"If somebody doesn't know how to [organize their workspace] they shouldn't feel ashamed or guilty," says Laura Leist, president of the Mount Laurel, New Jersey-based National Association of Professional Organizers. "I'm not good at graphic design or accounting, I hire those services out."

This guide will teach you the skill of organizing both your time and your workspace, and hopefully, increase your personal productivity.

Organize Your Workspace: The Different Categories of Organizing

"When you're talking about organizing your workspace you need to make a decision about what needs to be organized and there's five areas that you can look at," Leist explains. These five areas are paper, general stuff such as office supplies, your space and furniture layout, electronic information, and time management.

Here are some tips for navigating each of these organizing categories:

Paper

The way you name your files can dramatically improve the organization of both your physical and your digital documents. Leist recommends that, "versioning control and consistent naming conventions are really key to document management and being able to easily retrieve files." These are just fancy ways of saying that a document's name should reflect which number draft it is and that the name should be consistent across versions. Having the date the document was created in the name can also be beneficial.

Stuff

Leist has observed that people will often rush out to buy more folders, containers, and staplers, before assessing what they already have. She recommends grouping all like items together and considering what role they play in your broader organization system before going out on a shopping run.

Electronic Documents

The paperless office is a neat freak's nirvana but even with an ever-expanding arsenal of electronic tools it's a rare office that has completely done away with dead trees. Which doesn't mean you can't make big strides in that direction.

Adam Pash, the editor-in-chief of Lifehacker.com, a website that offers daily productivity tips and tricks, sees a paperless office in the near future. "Getting every aspect of your analog life into a digital format is the direction that a lot of people want to head and will continue heading," he says.

But going digital is not a silver bullet. Pash notes that many people use their computer and physical desktops as a de facto to do list. As a result, all the things they need to remember accumulate and create disorder. Go here to read the Lifehacker post on [digitizing your life](#).

Space

Small business owners "wear so many hats, they usually have pretty limited support staff, and they're idea factories," says Julie Morgensten, a productivity consultant and the author of *Organizing from the Inside Out*. "Your workspace has to be organized in a way that accommodates that." Morgenstern calls her system for organizing a workspace the kindergarten model: items and documents are organized by role into what she calls activity zones.

In addition to helping you keep your things in order, it improves your time management skills as well because it gives you a better idea of whether you're neglecting one part of your business. For example, maybe you start to notice that you never go into the corner where your financial files are kept because you're always excitedly pattering away in the corner with your marketing files.

Time Management

One useful time management trick is distinguishing between events and ordinary to-do items. An event needs to take place at a specific time on a specific day, whereas another type of to-do, such as a follow-up call with a networking contact, can be taken care of on a more flexible schedule.

Organize Your Workspace: Measuring Productivity

So you're thinking of giving organizing a try but you're not persuaded of its concrete benefits: You were only searching for those client records for forty-five minutes, but to stay organized is starting to sound like a lot of work.

While it's true that the benefits of being organized can be tricky to quantify, Pash says that the best gauge of being well organized, "is just the lack of anxiety that comes from a clean comfortable workspace where you feel like things aren't piling up and overwhelming you."

However, Leist mentions results that demand far more attention. She claims she has taken clients from pulling in several hundred thousand dollars a year to bringing in several million just by helping them run a tighter ship. Particularly, clients who restructured the way they handled customer relations found it very remunerative.

Organize Your Workspace: The Sources of Clutter

Just because your office looks like a hurricane hit it doesn't necessarily mean you are disorganized. "Some people work incredibly well out of piles," says Morgenstern. "Their desk is covered with piles but if you ask them to find something they can find it in an instant." On the flip side, other people keep their workspaces looking neat by shoving important papers into closets or under their desks.

Still if you're swimming in a sea of paper you should probably do some degree of organizing. Common sources of clutter for entrepreneurs include business cards, printouts from the Web, and literature from conferences and seminars.

A good way to get rid of clutter is to turn each piece of paper that you're keeping around into an action item in your planner. For example, "if it's a stack of business cards that you've come back from a networking event with, really it's a series of actions that you need to take and what you want to do is not leave them even in a file, you want to convert those into actual to-dos or calls that are going to go into your calendar," says Morgenstern.

Organize Your Workspace: The Value of a Personal Assistant

Bringing on a personal assistant can be an invaluable step for the small business owner but choosing one is not an easy process. A personal assistant is "a hard hire to make for most entrepreneurs because you feel like 'am I making enough money to justify that?'" says Morgenstern. "But I think there's a certain point in your business where you have to spend the money so it can free you up to make more money."

Once entrepreneurs have taken the plunge and added an assistant to their payroll, they often don't use that person to their best advantage. Assistants often excel at taking tasks such as writing your blog posts, handling scheduling, and reminding you about following up with clients but they sometimes fall down when it comes to your business' big picture.

Essentially you need to be somewhat organized already for an assistant to have an optimal impact. "The problem is [personal assistants] are really great at maintaining systems but they're not good at looking at the overall business process and strategizing, so they don't really know how to come up with those [organizing] systems," says Leist.

Additionally, an entrepreneur typically remains with a company well beyond the tenure of most assistants and so they need to be the keepers of the institutional memory regarding how the organizing system works so that a new hire can be brought up to speed quickly.

Organize Your Workspace: Adjusting to a Home Office

Many of the rules for getting organized at your work office can also be applied to your home office, says Leist, who largely works from home. She stresses, however, that a key difference is that a home office worker needs to "understand that they definitely need to have a dedicated workspace."

Partitioning your work life from your home life is partly mental; it's easier to enter and exit a state of productivity if it's cordoned off in a separate space. But the separation can also have more tangible benefits. For example, having a separate computer for your kids to play on can be crucial to avoid nasty viruses that can muck up your business and endanger sensitive data.

Organize Your Workspace: Common Mistakes

The first organizing mistake business owners make is not even making time to assess their mess.

"Clutter is so often the result of a time management problem rather than an actual organizing problem," explains Morgenstern. "Entrepreneurs are often so overwhelmed, they have so much to do, and the last thing they want is to 'waste' their time on putting things away. But if you can, build in 15 minutes at the end of the day to put everything back where it belongs."

Another common mistake is storing your papers and your stuff wherever there's room for it rather than where it gets used. If your filing cabinet is stuffed into the hall closet rather than sitting next to your desk, the documents inside it are likely to get overlooked or misplaced when they are needed most.

A final mistake that entrepreneurs and others often make is confusing the process of throwing away with actually getting organized. While organizing is putting systems in place to find what you need when you need it, "decluttering is what you do when you're trying to make a significant change in your life or your business. You're in some form of transition and you're feeling stuck," says Morgenstern. It's "about identifying what is obsolete and getting rid of it to make room for what you plan to do next."

Organize Your Workspace: Tools

Leist counsels, half in jest, that the best tools for organizing your workspace are the recycling bin and the shredder. Here are some products that can help you keep your workspace in order:

If you've digitized a substantial portion of your business' information, it's probably wise to invest in a service that automatically backs up your data. Pash recommends [Mozy](#).

For business owners who haven't yet digitized their paper, Pash recommends the [Fujitsu Scansnap scanner](#).

Even with the iPad, accessing your information remotely can be a hassle but [Leist suggests that LogMeIn is a good tool for accessing the data on your work computer from anywhere](#). Morgenstern favors [gotomypc.com](#).

When you're investing in filing drawers for your office make sure you get a model that extends fully. Otherwise prepare for frustration and unreachable documents.

When it comes to CRM tools, the experts we interviewed point to [Salesforce](#), [Act!](#), and, for those on a budget, the business contact manager in [Outlook](#).

Pash recommends the [Brother P-touch labeler](#) for setting up an organizing system and whipping your files into shape.