



**Smarter, Faster and Better
office systems for your workplace**

Linda Wallis, B.Ed (Adult) MOS
P. (09) 430 7363

linda@assistyou.co.nz

www.assistyou.co.nz
M. 027 460 5092

Worksheet

FILING SYSTEMS THAT COULD WORK FOR ME

List different filing systems (not products)

Describe the system:

Could it work for me – under what circumstances

Starting Now . . . I will commit to:

List three actions that I will take within the next week

1.

2.

3.

Date

Signed.....

Challenge

THE RED DOT CHALLENGE

We all have "too hard baskets" - things you keep putting off for another day. But you'd be amazed at how much time & energy you actually waste handling paper multiple times yet not finishing the task then and there!

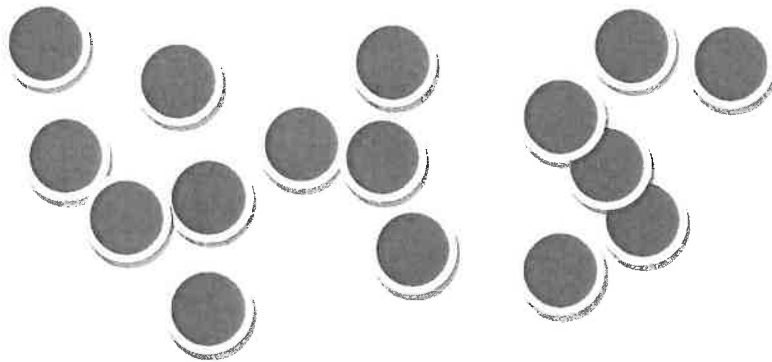
Try this little experiment: Any time you pick up a piece of paper put a little red dot in the corner. Once you've picked it up and put it down a few times you'll really start to notice the things you are procrastinating over.

In short, you don't want your paperwork to get the measles... so just do it!

These "too hard" tasks are not usually as hard as we think, especially if we break them down into manageable steps and schedule time to address them.

From: [Sophie Gill, Little Miss Sorted](#)

From chaos ... to calm, from squishy to spacious
From crowded... to clear
From overflowing... to organized



*"Nobody can go back and start a new beginning,
but anyone can start today and make a new
ending."*

~ Maria Robinson

Step One – Start Over

- It may be time to make time, start over and re-organise your desktop. It all comes down to laying the right foundation, one that you can build on.
- I believe we all have limited time and no one has time to waste on organising files from many years past, so instead, put your efforts into the NOW. Move forward and take a good hard look at what's happening NOW.

Step Two - Create an Archive Folder, De-clutter your Desktop and Move files from your desktop into it

- Clear your desktop – a busy screen causes eye strain and can be confusing
- Create an archive folder, delete what you can and move everything else into the Archive folder only leaving you with a recycling bin, you must have program shortcuts and your Archive Folder.

Step Three - Jot down your plan first then set up Main and Sub-Folders

- Start with a piece of paper and open your archive folder and filing system (Windows Explorer) Expand all folders
- Now take a good look and start thinking of what Main Folders would make sense for your particular situation. Then look deeper and think of what Sub Folders make sense – play around for a little bit, jot things down without over thinking it, you just need a good start and then the list will grow from there.
- The more time you spend here the better your foundation will be.

Step Four - Move what is relevant NOW into the main and sub folders you created.

- Now it's time to actually tackle the archive folder and move only the individual documents that you know are relevant as of right now – move them into the main and sub folders you just created. - keep that visual noise at bay. Don't waste time renaming files/documents now, this is the foundation
- Don't rename anything at this point. Wait until you have your new structure set up.
- Remember the Archive file is a safe place holder without taking up your visual space
- Simply move what is relevant now

Step Five - The naming Game – decide one way you want to name your files – this requires team work.

- Consistent naming protocols are vital!
 - Date first – year month day means they are always in order
 - Practical and simple
 - Consistent and lower case
 - No special characters
- Stick to one version moving forward.
- Now rename all the files that you moved from the Archive folder.
- One and only one way to name your files.

Step Six - What a shame it would be if you'd lose everything you've done

- Save all your hard work – back it up onto your server or an external hard drive.

Assist You – Workshop 3

CHALLENGE	WASTE (Adapted from <i>Professional Organizers Tell All</i>, Eileen Roth, (2010))
<p>W - Is it Worthwhile?</p>	<p>Is this information worthwhile? Was it just an FYI, or completely unnecessary?</p> <p>Is there any information on the document you need? (E.g.: You probably don't need fax cover sheets.)</p> <p><i>If you answered "No," toss it.</i></p>
<p>A – Will I use it Again?</p>	<p>Are you really going to use this information again? Be honest. Pareto's 80/20 rule really applies here. Eighty percent of the papers you keep, you won't use again. Twenty percent of the papers will be used eighty percent of the time. So most of the papers you receive you won't use again.</p> <p><i>If you answered "No," toss it.</i></p>
<p>S – Can I easily find it Somewhere Else?</p>	<p>Can I find this in another department or on the Internet? If you were simply copied on this document, you know two other people have it—the writer and the person it was addressed to. Do you already have this information?</p> <p><i>If you answered "Yes," toss it.</i></p>
<p>T - Will anything happen if I Toss it?</p>	<p>Does it affect your taxes? Is it a legal document? Is it an historical document for the company? Is it critical to the project?</p> <p><i>If you answered "No," toss it.</i></p>
<p>E – Do I need the Entire item?</p>	<p>We all know you don't need entire magazines, just the articles you really want to read. What about everything else? Do you need the entire thing? Do you really need all those meeting notes, or just the ones where you have to take action?</p> <p><i>If you answered "No," toss the part you don't need.</i></p>
<p>Ask Yourself</p>	<p><i>"If my building burned down, would it be a tragedy if this were lost?"</i></p>

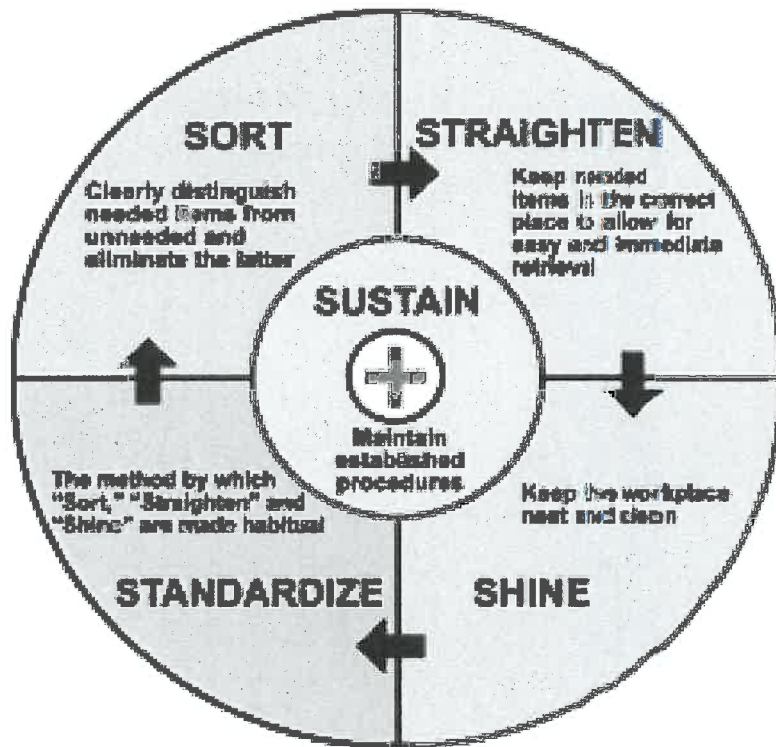
**OTHER BUSINESS
IMPROVEMENT IDEAS**

**KAIZEN - Continuous improvement in small
increments**

The kaizen 5S framework for a well organized business

- Sorting – when in doubt throw it out
- Straighten or set in order – “A place for everything and everything in its place”
- Shine - systematic cleaning – part of the daily work
- Standardize – “see and recognise what needs to be done”
- Sustaining the discipline

Major Results: Elimination of waste and incorporation of efficiency



Please note: this handout is designed to provide information on the subject matter covered and is based on the authors’ opinions and experience. The information contained in our workbooks & workshops/ seminars is designed to assist you to explore certain issues that may affect you and your business. The information and tools provided are not substitutes for commercial judgement or professional advice. You should not act in reliance upon any of its contents without first obtaining professional advice relevant to your circumstances. Flying Colours Aotearoa Ltd accepts no liability or responsibility for ensuring that the information and tools are appropriate for you or your particular business.