Organizing Your Workspace — by David Allen

We often get questions about personal work areas: "What is the best way to organize a desk space, bookshelves, and my whole office? What special gadgets or tools can help me organize the work most efficiently? How often should I clean and organize it – assuming that it doesn't stay neat as soon as it's cleaned?"

I will share my thoughts about gear and workspace logistics, but keep in mind that in order to understand how it all fits together and to make this work, you should be familiar with my documents on the Workflow Diagram, General Reference Filing, the Tickler File, and the Weekly Review. All of these are available on the davidco.com website.

The workspace should function like a cockpit – all the controls easily accessible as required, allowing for maximum focus on the work at hand, quick over-viewing of work to be done, and easy ad hoc processing of all forms of input (from email, paper mail, phone, and live conversation).

BASIC HARDWARE

Here's a basic toolkit:
1. In-basket (top basket)

2. Work-in-progress basket

3. Standing wire racks for file folders (work-in-progress support)

4. Out-basket

5. Computer

6. Printer (have one right at hand – it'll save you hours!)

7. Clock

8. Phone/answering machine

9. Capture/communication tools – writing pad, stapler, tape; desk tray and holders for pens, post-its, paper clips, scissors, stamps

10. Labeller (for files)

11. New file folders (lots, at hand!)

12. Filing cabinets (within reach)

13. Telephone/address database

14. Calendar

15. Personal supplies (best in at-hand drawers): refills for writing instruments, batteries, business cards, stationery, envelopes, headphones, blank CDs, small tools, and the like.

WORKSPACE FUNCTIONALITY

Two types of materials belong in your workspace, and it's very productive to sort them accordingly:
1. What belongs there permanently
2. What is in transit and incomplete

Most people have vague (if any) physical and visible distinctions between these two very different categories in their environment – what has action required and what doesn't, because it belongs there. In our workflow coaching with executives, the first activity we have them do is sort out what stays where it is and what still needs attention. Often, too, there are many things that should be purged OUT of the environment. Sometimes a plethora of outdated "stuff" can accumulate, clogging up drawers and nooks and crannies of desk real estate.

Permanent Stuff

The only items that belong permanently in your workspace are: supplies, reference material, decoration, and equipment. Anything else goes first in the in-basket to be processed and then is either tossed, tickled, filed or coded into your action-reminder system.
"Supplies" – everything you need, and use up, on a regular basis – writing and printer paper, stamps, paper clips, tissues, ink, etc.
"Reference material" – your files, ring binders, directories, manuals, lists of codes, etc.
"Decoration" – wall décor, art, plants, family pictures, nostalgia, cartoons, etc.
"Equipment" – furniture, phones, computers, PDAs, printers, stapler, letter opener, pens, chargers, projectors, briefcases, etc.

Keep It Current

It's often a worthy exercise to exorcise the supplies, reference material, decoration and equipment that really aren't any longer. Many things that start out as functional in those categories become outdated, useless, or misplaced simply by the passage of time. It's good to regularly purge and reorganize the desk, drawers, shelves, countertops, and files. It's very easy to go unconscious to stuff just because it's there, undermining the sense of active utility in your environment. If you have things still around that you're not sure if you might need again (such as miscellaneous electronic accessories), consider putting them further away from you in plastic storage bins labelled "Misc Gear," which you can then reevaluate later as to its relevance.

Filing Styling

It is important to pay attention to the logistics of filing in your office area because, besides furniture, it requires the most space and physical movement to execute. General reference filing (also including support files for projects in progress) should be within easy reach. You should eliminate any resistance to filing a single piece of paper out of the in-basket, if it's potentially useful information. (See my article on General Reference Filing.) If you have inherited your office and its furniture and its layout, you may be the victim of aesthetic elegance and functional unconsciousness. Standard corporate issue are side-opening filing cabinets that require hanging files, which aren't nearly as easy to use as the front-opening types with slider blocks that hold files upright. Most people need four full file drawers for their own personal general reference filing, if they have an easy enough system to use for all the miscellaneous paper-based reference material that could be keep-worthy. Any reference material that can stand up by itself goes on your shelves, like books, thick manuals and binders (appropriately labelled). Anything else should live in its own file alphabetically in your filing cabinets.

In Transit and Incomplete Stuff

The movable stuff in the work area consists of:
1. Input to be processed
2. Action reminders

Input Processing

Workspace should be organized to make it easy to process input at random times (email, voice mail, paper mail, etc.) The in-basket and your email should all be easily process-able while you're on hold on a conference call, or waiting for someone to walk into your office. So not only the phone and the computer, but also the in-basket should be at hand's reach. The in-basket can and should hold everything that is not yet organized, so there is no need to have a "messy desk". Sure, I spread my stuff out to work on a project or with a client or for a meeting, but when I want to focus on something else, I need to re-gather it all and either re-file it as appropriate or toss it into "in" until I can get to it again. Of course a legal pad or some form of easy note-taking device should always be right at hand in case the phone rings or I want to check voice mail, or someone pops into the office and lets me know something that I might want to do something with later on.

Action Reminding

The action-reminder tools in a workspace consist of (1) calendar, (2) reminders of as-soon-as-I-can-get-to-it actions, and (3) overviews of projects and longer-horizon outcomes. These can be in whatever hardware you have personally chosen as the most logistically efficient for your life- and work-style. They could be in a loose-leaf planner, a software application, and/or paper-based folders and baskets.

The first thing usually accessed at hand is the calendar (and a clock), to let you know where you have to be when today. It signifies the "hard landscape" for your day, and so must be the most easily and consistently reviewed device and information. The next most accessible for review need to be the action-reminder lists, folder, or baskets. ("Gee, I don't have to be in the meeting for another 15 minutes... what could I handle and get off my plate between now and then?") The lists of projects, objectives, goals, visions, might-want-to's, etc. just need to be accessible enough so, in the Weekly Review, they are perused appropriately for effective calibration of your intuitive operational focus.

KEEPING THE SYSTEM

If the workspace is organized appropriately, according to the real principles of workflow (as I've outlined above) it's no big deal to keep it up. As a matter of fact, the more airtight the system is, the more out of control you can let it get! If you're on a real roll (making money hand over fist today), who cares how clean your desk is?! With a clear system in place, it is not only easy to get things back into control, it's actually fun. Without the system, it's frustrating, and there always remains a vague sense of being out of control because the game hasn't been fully structured.

The Weekly Review should be the time to get the edges back, make sure it all is in place, ready for another successful roll. But it's also a great habit and principle – when in doubt, clean a drawer! (There's another roll coming!)

DAVID'S PERSONAL OFFICE SPACE (come on in…!)

On my Desk

1. Two of my Fedon stacking trays – top one for IN and the underneath one for "action support" materials
2. Two Fedon wire stand-up file holder racks, for my plastic system files and work-in-progress support files (current active projects and standing meetings)
3. Laptop in port replicator stand, attached to: network, printer, external storage drive, and synchronizing connectors for PDA, iPod, digital camera, labeller, scanner, and digital recorder
4. Extra single Fedon stacking tray to corral a power strip with miscellaneous chargers
5. Fedon holder for highlighter/letter opener/scissors
6. Two Fedon organizer trays with paper clips, staple remover, stamps, post-its, pens, USB mass storage sticks, lip balm
7. Stapler
8. Scotch tape dispenser
9. Legal pad
10. World globe (small, for decoration)
11. World Atlas (Smythson)
12. Labeller (Brother PT-18)
13. Scanner (small – Canon)

In the Desk

1. Small drawers: pen refills, staple remover, batteries, business cards, flashlight, NoteTaker Wallet refills, deposit slips, USB headset
2. Deeper drawers: supply of new manila file folders, small tools, miscellaneous travel accessories, etc.

On the counter behind me

1. Heavyweight stapler
2. Printer/fax/copier (HP 2840)
3. Fedon stacking tray for OUT
4. Fedon stacking tray for Read/Review – magazines, articles

My files

In my desk:
1. Tickler file
2. Personal financial files (A-Z)

Within reach:

1. Personal DAC company files (A-Z)
2. General reference files (A-Z)

Also...

1. Two small metal cabinets with drawers for stationery, printer checks, envelopes

And on miscellaneous shelves and in the closet

1. Books
2. Printer paper
3. Larger gear

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