

Top Ten Tips on How to Organize Your Office

www.freechurchforms.com
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Introduction

Hi! My name is Terressa Pierce. I have worked in secretarial positions through the majority of my working career. I have been in many different secretarial areas. I have worked as the secretary for our church (non-profit organization) for over 12 years now. Through these years I have learned and experienced the best ways you can organize your office.

I have always been the type of person who if it will save me 5 minutes out of my day I will give it a try. I have always been an organized person. If the office isn't running smoothly then I will keep trying until it does.



I decided to build my own website in 2008 when our Chief Financial Advisor had starting building her site (www.freechurchaccounting.com). She played one of the major roles in helping me to get organized with the financial part of my job.

I knew our church couldn't afford a church accounting software so I was putting all of the entries in by hand on a general ledger. She saw how much time it was taking me and how I was pulling every hair out of my head one by one, and she created a simple accounting program /spreadsheets just for me for **free**. Now she has several websites and she is giving away her wonderful simple church accounting spreadsheets and much more.

It was after the inspiration from our Chief Financial Advisor that I had the idea to help other churches by creating and sharing free church forms, certificates, flyers, and much more. I was also able to create an awesome church membership database called Shepherdbase to help small churches to have a way to track their church memberships, contributions and much more.

You will learn more about all these assets in this ebook that I made available for my free newsletter customers.

In this ebook you will learn the **Top Ten Tips on how to Organize your Office**.

I hope you enjoy!

Thanks!

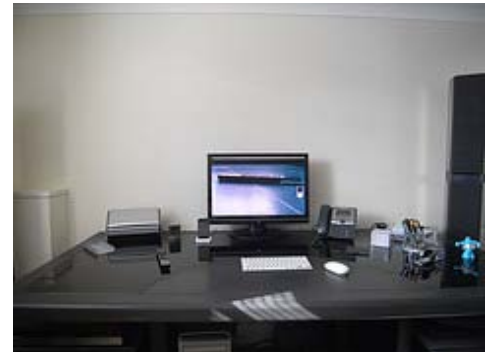
Terressa

Chapter 1

Clear Off Your Desk

Number one is simply clear off your desk. It's impossible to be productive when you're working among piles of paper and other desk clutter. Keep only these things on your desk:

- The one project you're working on right now
- Your calendar
- A desk supplies caddy (to hold pens, markers, scissors, paper clips, etc.)
- A portable file holder containing some frequently used files
- Your telephone
- A Rolodex
- A lamp
- Your computer
- Post It Notes (can't live without these ☺)
- And of course you have to have a picture of your family, hang them on the wall to save space if more than one



File everything else in the file cabinet and toss what you do not need or use.

If you have an office or a home office, you know how clutter can hurt your productivity. The key to keeping your workspace free of distractions is to have a plan. When you make a concerted effort to organize your office space, you'll likely notice a big difference in your ability to handle your workload.

Chapter 2

Organize Your Filing System

Number two is very, very important and that is to organize your filing system. There is only one home for a piece of paper – in a file, in a filing cabinet or file box, or in a file holder.

- Weed out and organize your current filing system whether you're filing papers or files on your computer.
- Eliminate paper you don't need, and work the paper you do need into your filing system.
- If the filing cabinet you currently have isn't sufficient for your needs get another one.
- Older papers that are important to keep, but are rarely looked at, should be packed up in file boxes and put into storage.
- Create a filing system with broad categories such as "Insurance" and then break those categories down further into sub-categories (i.e., car, life, medical), alphabetizing them along the way. Devote one file drawer to each category (if possible) and use a different color for each category.
- If you're organizing your computer files these need to be in categories also, and if are not using certain files on your computer then burn them on a disk and file it where you can locate easily at a later time. If will not need or use them again then by all means trash them.
- Set up a tickler file to corral the to-dos. A tickler is a 1-31 file with dividers for each day of the month and months of the year. So, if you have a memo with a phone number of someone you need to call back, put that paper in the tickler on a day you can return the call.



As long as you have organized filing systems in place, it should be fairly easy to keep your workspace clutter-free. Stay on top of the clutter by putting things away each day. Sort your incoming paper daily and decide what you need to do with each piece of paper. It's a lot easier to tackle clutter a little bit at a time than to let it build up until it takes over your desk.

Chapter 3

Clean Out Your Office Supplies Cabinet

Are you tired of that overflowing, overstuffed office supply cabinet?

You know the tall, 3-shelf one that you're literally scared to open.

It's bulging with pens, labels, disks, binders, post-it notes, paper pads, paper clips and more. It's so full that you don't even know what's in there. You can't find what you need when you need it, which causes your blood to boil in frustration. Plus, you're constantly running out of supplies because there's no *system* to let you know when you're running low.

It's time to clean out your office supplies cabinet. When you need a pen or some notepaper, you should be able to retrieve it in 10 seconds or less. If you find it's taking you much longer than that, then your office supplies cabinet needs an overhaul.

- Empty it out. In order to truly organize your cabinet, it's going to have to be emptied out completely.
- Categorize and store similar supplies together.
- Use storage containers (labeled) to consolidate boxes of paper clips and other small items.
- If you have a top drawer in your desk use it for just what you use everyday like paperclips, pens, post it notes, and other desk accessories. Don't put anything in the top drawer that you don't actually need. If you haven't used it in six months or more, throw it out to make more space in your desk.
- Make an inventory list.
- Have only 1 person in your office in charge of ordering supplies for cabinet. Do not overstock if possible.

You can organize your office supplies cabinet in your own way so long as it gets organized and decluttered.

Chapter 4

Organize Computer Area

Do you have wires going every direction that you are all the time getting your mouse caught in, and not mention sometimes even having trouble finding your mouse?

You need to get your computer area in order.

- Clear your computer area of paper clutter.
- Organize the wires from your computer by drilling a small round hole in desk behind computer where you can't see it and neatly put all wires through hole down to power surge protector on the floor and plug it in. Have a big enough power surge protector to plug in every part of your computer area (computer, printer, fax, etc.). This will keep all the wires from crossing each other and will eliminate clutter in your computer area.
- Relocate anything that casts a shadow, to reduce distractions (besides the computer, of course). Also arrange the screen and surrounding lights to avoid glare and reflections. If the computer's terminal is next to the monitor, you might want to move it to the area next to your feet, if possible. This way, you can only see the monitor, leaving less room for distractions. Always remember though, your monitor needs to be eye level right in front of you to prevent muscle aches later on down the road.
- Look on the desktop of the computer itself, and remove all unnecessary icons to the recycle bin, or to your "My Documents" folder, where they will be out of sight.
- Put CD-ROMs and diskettes in holders and file.
- Place frequently used computer manual on a shelf and rarely used ones in an out-of-the-way storage area. Toss or donate old, outdated software that you'll never use again.
- Affix file pockets near your door so other staff members can pick up their papers right from the pockets without disturbing you.



Chapter 5

Save Desk Space

We all have photos of family (children, grandchildren, mom, etc.) everywhere on our desks not to mention all the pretty little knickknacks that everybody in the office has given you throughout the years.

- Hang it up. Don't take up precious desk space with photos and other knickknacks. One family photo is not bad, but the rest needs to be on the walls.
- Install large shelves for books and smaller shelves for trinkets.
- Pin up project planning calendars.
- Install a hook on the back of your door for your coat or jacket.
- If you have paperwork that you need to access on a daily basis, consider getting a desk letter organizer. This way the paperwork that you need will always be handy, but it won't waste a lot of space on your desk.



These are a few of many things you can do to save desk space.

Chapter 6

Save Office Space

Has your office space become a little too crowded lately? Here are some ways to save on your office space:

- Free up your visitor's chairs. By doing so, if you hold appointments in your office often, you will not have to keep clearing off the chair each time. If you rarely have appointments in your office, you may consider removing the chairs completely and freeing up your space.
- Make sure your desk is appropriate for the job. If your desk(s) are too big or the wrong shape, they will be taking up valuable office space. By making sure that you staff have the right desk that provides them with the space they need, you can save space.
- Make sure there is enough light in the room. A lack of light can cause all sorts of problems, and can lead to parts of the office not being used. Perhaps you currently have an area of the office that is being used for storage, when with the appropriate lighting, the area could be used more productively.
- See if your office layout can be improved. If you think that you have exhausted all options, and have concluded that the only way to make more space is to move, you might be surprised to learn that more space can be achieved by changing the office layout. By grouping staff with similar roles, or equipment requirements together you might find that you save space. You think about utilizing different storage methods to save space. What about seeing if some workers who are not normally office based could share a desk? What about setting up a hot-desk so that any sales or other field based staff could work when in the office, but don't require their own desk that won't be used that often? There are also many other options that are available to you, so that you can make the most of the office space that you have.

Just because you've run out of office space, you don't necessarily have to move premises yet. Study all avenues first.

Chapter 7

Save Personal Time

Reducing interruptions and saving on your personal time throughout the day helps to be more productive and it cuts down on your stress level also. Here are some ways to save on your personal time:

- Reduce interruptions at work by moving your desk so you can't see the door. Passers-by will not be able to catch your eye as they walk by, thus avoiding unnecessary conversation.
- To minimize interruptions of your own time and others, schedule a 5-minute meeting somewhere during the day with the people you most often need to speak with. This prevents the frequent knocking at your door you may experience! Let others know when you are available to meet with them, perhaps between 3-4 PM, for example. Ask your boss for 5 minutes of his/her time everyday to go over any questions you may have, eliminating the need for constant interruptions. (Tip-this works great with spouses also! No more, "Honey, can I just ask you to do this one thing?" Or calling him/her at the office to find out when to pick up the kids. Daily meetings are much appreciated by all!)
- Resist the need to answer your phone every time it rings unless you are at a job that receives urgent calls such as hospital emergency room. Use your voice mail when you are working on something.
- Prevent phone tag and wasted time on the phone. When returning phone calls, gather all the information you need BEFORE you make the call. See if there is another person who can answer your question, instead of having to wait around for a response.



- Most everybody has a computer but if you don't you need to get one. A computer will save you more time than anything. You can make [forms](#) to organize your office even further and keep them filed in your computer for easy access. I have them filed in categories so I can find them within seconds and print one. If you have [church certificates](#) you need to access before the next church service just have them filed on your computer under file "certificates" or whatever is easily remembered. If Veteran's Day is coming up and your Pastor calls and states that he would like to distribute certificates for all the veterans in the church and he needs it by tomorrow, no problem just go to your computer and pull up your [Veteran's Day certificate](#) and print. The job is done within minutes.
- You can have email if you have internet. Email is almost a must to have in an office. This will save a lot of printing and passing out memos, etc. You can also reach someone in your company by email if you are not reaching them by phone. Most of us have our email up while working and we know if any mail comes in through the day. This will save you time also due to it only takes a minute to read an email, but takes sometimes forever for a phone call. If the person still needs to talk with you on the phone they will call you. In the meantime, you are not wasting time on the phone trying to reach them.
- Another way of saving your personal time is in the next chapter "Computer Programs. I'm a living example that having a computer program to do most of your work for you will save you so much time that you will wonder how in the world that you even lived without it before.

Chapter 8

Use Forms and Templates

To help you keep organized and save your time also use templates and forms anytime you can. Here are some reasons to use them:

- So if people come into your office often to borrow something, instead of having them leave a note, keep a stack of “Borrowed Item Forms” for them to fill-in-the-blank and leave for you in a designated location.
- Forms look better than hand written paperwork and you can pull them up anytime on computer and change wording, etc. within a short amount of time. For instance, if you have a form you use to do inventory and your inventory has changed since last month with a form all you have to do is pull it up on your computer and add or delete whatever the case may be. Then print your revised form and your ready to do inventory. Everything I do at my job I have a form to help me do it. If I think it will save me 5 minutes out of my day I will create another form.
- Templates are used a lot of time when you, for instance, need to send 50 people the same letter. You can pull up a template of the same letter and merge all 50 names, addresses, etc. into the same letter very quickly and save lots of time this is called mail merge. Most computer programs like Microsoft Office have this.



Microsoft Office has Word, Excel, Access and more. MS Word is what I use a lot of times to write letters and make many of my forms. MS Excel is what I use to make some forms, but mostly I use it for spreadsheets like accounting, etc. MS Access is what I have created my church membership database on, which will be in the next chapter. Microsoft Office is the most user friendly that I have used. I love it!

There are numerous reasons to use forms and templates. I would suggest if you are not currently using them for you to begin immediately. You will be glad you did. ☺

Chapter 9

Save Time with Database Programs

You can save time with database programs such as [Shepherdbase](#), a church membership database that provides churches with a **simple and easy** solution to **track church membership information and contribution records**. I have this available on my website if you want to check it out by clicking on the link above.

I was trying to keep up with all the church memberships on paper and the contributions also. Then I decided to create this church membership database called Shepherdbase on Microsoft Access. It's so convenient now to just pull up my database every week and enter the contributions. It has a running total of their contributions at all times. I can access a membership directory with names, phone numbers, addresses or whatever I need so easily. You can print or



email this report to the person who is control of contacting members and it is very easy to keep updated. I also created an Annual Contribution Letter in Microsoft Word that connects with by database and will print their contributions at the end of the year with a couple of clicks. Saved me hours from what I was doing before.

There are many other databases. If you have the MS Access program on your computer you can start a database with all your employees/contacts information. Access has several templates such as Assets, Contacts, Issues, Events, Projects, Tasks and many more. I really like this program. This program will save you time and help you to get your office organized. There is online help also to help educate you on this program.

Chapter 10

Save Time with Accounting Programs

You can save time with accounting programs such as what our Chief Financial Advisor at our church created for me in Microsoft Excel. Before she created these spreadsheets for church accounting, I was literally pulling every one of my hairs out trying to keep up with our church accounting on a paper ledger.

She created a simple accounting program just for me and made my life soooooo much easier. The program allows me to simply enter my information and will automatically set up a monthly financial report. Since that time, she has built a wonderful website on church accounting that she has decided to give away her free spreadsheets for church accounting and also free contribution spreadsheets. She has been able to share her accounting spreadsheets with all kinds of wonderful people all over the world.



I was inspired from her website to build my freechurchforms.com site. If you are interested in receiving her free spreadsheets and free information on church tax laws go to freechurchaccounting.com. Believe me this accounting program will save you so much time and stress and will help to get your church office organized.

She has another website on basicaccountinghelp.com and she gives away free accounting spreadsheets for small business owners. To own a business of any kind you have to have an accounting program. Feel free to check out this website by clicking on the link above.

So if you having to do any kind of accounting paperwork to keep up with financial matters in your office you definitely should find a good accounting program to use. This will simplify your life and lower the stress level.

I hope you have enjoyed this **free** ebook on “**The Top Ten Tips of How to Organize Your Office**”. Please feel free to [contact me](#) if you have any questions regarding this ebook or the forms on my website.