

7 steps to an organized office

keap

Take the guesswork out of getting organized by
following our comprehensive to-do list below.



Step 1. Clean your desk

- Get out your trash can, recycle bin, and paper shredder
- Put all loose papers in a “sort later” pile
- Put what doesn’t belong on your desk back in its place
- Dust and wipe down your desk with a cleaner to freshen it up

Step 2. Empty desk drawers

- Group similar items together (pens, sticky notes, etc.)
- Put papers in a “sort later” pile
- Put what doesn’t belong on your desk back in its place

Step 3. Organize desk drawers

- Buy drawer dividers or drawer organizers
- Put similar items together and only keep what you use regularly in your drawers

Step 4. Go through the “sort later” pile

- Sort through important papers you'll need for future reference and file them away in their appropriate places
- Shred papers that contain sensitive information but you no longer need
- Recycle non-sensitive papers you no longer need
- Set aside any bills that need to be paid. Make your payments once your pile has been sorted. Make note on the bill that it's been paid with the date (i.e. "Paid 4/11/19")
- Collect any sticky notes, event invites, etc., and add them to one master to-do list and your calendar
- Recycle outdated business stationery like letterhead or business cards

Step 5. Organize power cords

- Buy zip ties, large binder clips, or Velcro straps
- Unplug and untangle all power cords
- Consolidate the power cords and store them somewhere out of sight, if possible (behind a picture frame, in a desk drawer, etc.)
- Wrap cords neatly and secure with zip tie, binder clip, or Velcro strap
- Buy or make an organizer box if you'd like all cords hidden out of sight out of sight

Step 6. Clean out files

- Go through your filing cabinets and recycle or shred documents you don't need
- To make room for new papers, put older but still needed files in file boxes and put in storage
- Consider going completely paperless with a cloud-based file storage system like [Dropbox](#) or [OneDrive](#)
- Go through your computer files next. Delete what you don't need and organize what you do into their correct files.
- Back up all files on your desktop to your cloud-based file storage system

Step 7. Consolidate apps and software

- Make a list of the apps and software you use to run your business
- Update older versions and get rid of ones you're no longer using
- Save time and increase productivity by integrating apps and software in your work environment
- Consider ditching all those apps and start using [Keap](#) to organize all your client information and daily work in one place

TRAINER'S BOX