



LET'S GET ORGANIZED: A BUILDER'S GUIDE

USE THIS STRATEGIC CHECKLIST TO SPEED THROUGH ROUTINE TASKS AND PRIORITIZE YOUR PAPERWORK

Have you ever been so busy making money that you didn't have time to stop to collect it? Administrative tasks like billing clients need to be done routinely, not randomly whenever you can find the time. You need a system that *makes* time for routine tasks and helps you focus on getting your day-to-day work done.

Most builders make several false starts before either giving up entirely or finding something that works but is far from perfect. The first strategy many builders try is to schedule routine tasks for a particular day of the week. Friday might be a good day to do the billing because you can review the outcome of the week's work. And billing on Friday also lets you end the week on a positive note.

But how will you remember to do the billing when Friday rolls around? You could write it on your calendar or on Friday's To-Do List, but you'd have to rewrite it the *next* Friday and the Friday after that. In fact, you'd have to write "Do billing" 52 times a year. If you schedule all of your routine tasks this way, you'll be too busy

writing reminders to get any of the actual work done.

Making a Routine Checklist

The solution is to make and use a routine checklist. Your list may differ from the sample shown, but you can adapt it to your own needs. Here are ten steps you should follow to develop a routine checklist that works.

1. On a piece of lined or graph paper, create a rough form similar to the one in Figure 1, next page, including a grid with a box for each day of the week. Label the top half of the form "Daily Activities" and the bottom half "Weekly Activities."
2. List all of the things you need to do every day under "Daily Activities." Don't worry about the order for now, just list the tasks as they come to mind.
3. List all weekly tasks under "Weekly Activities."
4. Beginning with activities that must be done on a *certain* day, mark the appro-

priate box in the days-of-the-week grid. A good example of this kind of task is reporting labor hours to your payroll service.

5. Next, look for tasks that are related to the ones you just assigned, and if it makes sense to do them on the same day, or on the day before or after, mark them accordingly. For example, you need to collect and summarize your employees' time sheets before you can report your labor hours to the payroll service. Assign the remaining tasks to days that appear to have the lightest work load.
6. Now estimate the amount of time (rounded to the nearest quarter hour) it will take to complete each task, and write it down next to the activity name.
7. For each day of the week, calculate the total number of hours allotted to routine tasks (daily and weekly tasks combined).
8. Look for days that have been overbooked or underbooked. Remember

ILLUSTRATION BY DANIEL DRABEK

BY CHERYL NORRIS

to allow time each day for non-routine tasks, emergencies, and special projects. And don't forget lunch.

9. Balance the time spent each day of the week by making adjustments to those weekly activity assignments that are most flexible.
10. Transfer everything from your rough form to a master form (Figure 1). A hand-written or typed form will do, but using a word processor or spreadsheet will make it easier to modify the form later.

Using the checklist. As you begin to use the checklist, watch for items you overlooked when you originally developed the list. Also pay attention to any changes you want to make in the way the checklist is laid out. You may prefer, for example, to have your weekly activities listed by day — Monday's activities listed first, then Tuesday's, and so on. When you're sure the arrangement of activities works, generate a fresh master copy.

Of course, developing a checklist doesn't guarantee that you'll use it regularly. To help you get into the habit of consulting your checklist, keep it on a clipboard or tack it to the wall near your desk where you can easily see it. Using the checklist will take some effort initially, but once you grow accustomed to following the system, you'll spend more time *doing* things and less time thinking about what to do next. The checklist also comes in handy when you need to write a job description for office staff, and it will help you keep tabs on people in the office when you need to spend time in the field.

The Paper Processor

Routine tasks are only a part of your total work load. You also need to perform special tasks, like filling out a credit application, mailing a tax return to your accountant, and reading a trade newsletter. The papers associated with these tasks often lie around a builder's office in piles, clogging valuable work space, simply because there's no assigned place to put them.

The Paper Processor solves the problem. The Processor is a system of sorting, storing, and handling every piece of paperwork that flows into your office. Eventually, you'll use specific office supplies, like wire baskets and desk trays, to hold the paper, but you'll get a better idea

It Ain't Over Till It's Over

Most of the information that comes across your desk falls into one of two categories: *active* or *pending*. Active information demands that you — and only you — do something. You may need to make a phone call, write a letter, or send a fax, but the point is that the ball is in your court.

Pending information is slightly different. It still requires action, but the ball is in someone else's court. This means, however, that you must follow up to ensure that the necessary action is taken.

To see how this works, let's say you're looking over your schedule and you realize you need to get your plumbing sub to the site on a particular day next week. The note you make to "Call plumber" is active — you have to make the call. You phone at noon, hoping to catch the plumber in his office eating lunch. He's not there, however, so you leave a message on his answering machine.

Most builders make the mistake of believing that because they made the call to the plumber, they're done.

They wrongly assume that the plumber will respond appropriately and reasonably soon. But he may be struggling with his own time-management problems, and returning your call may not be at the top of his list of things to do. Worse still, he may never get your message, or he may lose it or ignore it.

To get your work done, it isn't enough to track your own responsibilities. You must also monitor the actions — and inactions — of others who supply you with necessary goods, services, and information. When you called your plumber and left him a message, you weren't "done" with that particular task: The task simply changed from active to pending. You still need to follow up with a second call, and maybe a third. In fact, most of the information you deal with daily switches back and forth several times between active and pending status. Before you cross something off your list, make sure that you are done with it and that it is done with you.

— C.N.

Routine Tasks

Daily Activities	M	T	W	Th	F
Sort contents of In Box					
Deposit all checks					
Back up data files					
Visit job sites					

Weekly Activities	M	T	W	Th	F
Collect time sheets	x				
A.M. meeting with lead carpenters	x				
Enter week's payroll		x			
Do filing		x			
Balance checkbook			x		
Send labor hours to payroll service			x		
Enter cash receipts				x	
Enter client billings				x	
Add new Change Orders to job files					x
Code & enter invoices and manual checks					x
Reconcile supplier statements with invoices					x

Figure 1. Develop a checklist for routine tasks. This ensures that nothing is forgotten, and spreads the work load evenly throughout the week.

of what you need if you set up a temporary Paper Processor first.

Sorting the pile. The first step is to take care of the paper backlog. Start by using sticky notes, index cards, or small scraps of paper to make five labels: *Read Later*, *Action*, *Follow-Up*, *Transfer*, and *Store*. On either the floor or a table top, clear enough space to make five separate stacks of paper. Arrange the labels across the cleared area, allowing room to stack papers side by side or in rows. Also make sure there's a large trash can or box within easy reach.

Starting with your desk top, sort your scattered papers into stacks corresponding to the five categories you've labeled. Most builders need help developing this skill (if they were already good at it, they wouldn't have a big pile of disorganized papers in the first place). Try this technique: Pick up and read one piece of paper at a time. Ask yourself, "Do I really need to keep this?" If the answer is "No," toss it. If you decide to keep it, ask yourself, "What needs to be done with this next?" and put it in the appropriate stack. Above all, don't lay the paper down again without identifying which pile it belongs to.

So what goes in which pile? Here are some guidelines to help you decide.

- **Read Later.** Newsletters, magazines, and reports.
- **Action.** Any item that requires *you* to take some action. (Unpaid bills do not go here; you should have a separate system for them.)
- **Follow-Up.** Any item that requires you to make sure *someone else* takes action.
- **Transfer.** Items to pass along or delegate to someone else.
- **Store.** Items to be filed in your general filing system (see "The Cadillac of Filing Systems," 12/92). Try to reduce this pile by immediately filing as many papers as possible.

After sorting the papers from your desk, sort all of the other piles of paper that have sprouted in your office. When everything is in the temporary stacks, you're ready to set up the permanent version of the Paper Processor.

In addition to containers for the five categories you used for sorting, you'll need a sixth for *Incoming* papers. You can use any combination of wall files, stacking trays, manila folders, and hanging files (Figure 2). Choose containers that match both the size of the temporary piles you



Figure 2. Set up the Paper Processor near your primary work area using standard office supplies like wall files and stacking trays.

just sorted and the kind of space available in the office. Wall files take up wall space, stacking trays occupy desk tops or table tops, hanging files and manila folders require a rack or frame and a horizontal surface to put them on. Also make sure the containers you choose will accept labels.

Work Flow

Once you get the accumulated piles of papers under control, you can begin to use the Paper Processor on a regular basis. How often you check the contents of each container depends on both the kind and quantity of information it holds.

Incoming. Most people call this the In Box. It temporarily stores new items, like the day's unopened mail, until you have a chance to sort through them. Empty the Incoming container at least once daily. If you don't, it will have twice as much stuff in it tomorrow, and soon it will come to symbolize all of the decisions you've been putting off.

Read Later. You will quickly outgrow your container unless you take the following steps to reduce the amount of material you put in this category:

- Add reading to your Routine Checklist, picking a time that is relatively free from distractions.
- Try not to place entire magazines, newsletters, or newspapers into your Read Later slot. Instead, scan the Table of Contents and detach only the articles that interest you.
- Be realistic about how much you can read. Reduce your subscriptions to those that provide information you can't afford to miss.

Action. The papers stored here, along with those in the Follow-Up slot, will receive most of your attention. Your system must allow for the fact that some

action items are more critical than others (see "It Ain't Over"). Rank papers in order of priority, keeping the most pressing ones in the front or on top of your Action slot. If necessary, create subcategories such as one for date-specific items. An item is date-specific if it requires action on a particular day or if it contains information about an event happening on that day. For example, a letter requiring a response on or before May 31 is date-specific, as is a flyer containing details and directions for a half-day seminar on June 15. Highlight the key dates on the documents themselves, and place them in sequence by date. Include a reminder on your Routine Checklist to check the Date-Specific section of the Action box every day.

If less important items start to pile up in the back or on the bottom of your Action box, review each one, asking yourself, "Is this something I want to do someday?" If so, store it for now in your general filing system, where you can easily retrieve it in the future. If not, throw it away, move on, and don't look back.

Follow-Up. Some pending items require closer scrutiny than others. Again, place the most pressing ones in the front of your container or use subcategories. Remember that many of the papers in the Follow-Up slot started out in the Action slot, and depending on the outcome, they may make the trip between these two slots several more times.

Transfer. Create a folder for each person with whom you regularly communicate or share information. For example, when you jot down a question for your accountant or get a piece of paper to pass along to her, place it inside her folder. Next time you see her, talk with her, or assemble a packet to mail to her, all of the information will be in one place.

Store. Whenever possible, prevent buildup of the proverbial "To File" pile by filing papers immediately. If your general filing system is well-designed, it takes just a few seconds to store passive documents like supplier catalogs and letters. If you need to start a new folder or establish a new heading, keep the item temporarily in the Store container. Remind yourself to file its contents weekly by including it on your Routine Checklist. ■

Cheryl Norris operates Order Out of Chaos, a Washington, D.C., consulting business specializing in office organization.