

Office Organization Checklist

Career Development



Daily

- As you start the day, check your priority list and your calendar for the day
    - **Tip:** Review your planner in the morning, after lunch, and before you leave to stay on schedule.
- As the day progresses, reassess what you will finish today and what can be finished tomorrow
- At the end of day, take stock of the tasks you have accomplished from today’s to-do list
- Draft your to-do list for tomorrow, and rank tasks/projects by priority
- Organize paperwork: file or discard per your company’s policies (e.g., archive, shred, etc.)
    - **Tip:** Spend 5 minutes decluttering your workspace after lunch or work to reduce cleaning time later in the week.
- Protect privileged or confidential documents/files ?— physically and electronically
    - **Tip:** Set up automatic log-out, lock screen during breaks, log out of computer when leaving the office, lock file cabinets.
- File receipts for timely processing and reimbursement

- Discard trash from your workspace
- Put away dishes, coffee mugs, etc.

Weekly

- Review your past week
    - What substantial progress have you accomplished regarding key projects/goals?
    - What planned tasks did you not complete?
- Plan your upcoming week
    - What substantial progress/major goals do you need to accomplish next week?
    - Draft your to-do list for the first day of next week.
- Spend 5 minutes cleaning your workspace at the end of the week

Monthly

Allot one organizing and one cleaning task to different weeks instead of front-loading them. For example:

- Week one
    - **Organizing:** Review paper files, and dispose of unneeded confidential documents per company policies.
    - **Cleaning:** Dust/wipe your desk, computer screen, and cabinets.
- Week two
    - **Organizing:** Review email inbox, and delete or archive unnecessary emails per company policies.
    - **Cleaning:** Disinfect your keyboard, mouse, and phone, especially during cold season.
- Week three
    - **Organizing:** Review computer desktop, and delete or archive unnecessary files per company policies.
    - **Cleaning:** Transcribe any memos from your sticky notes into your planner, notebook, or calendar as needed.
- Week four
    - **Organizing:** Plan the upcoming month by scheduling meetings and deadlines in your planner, calendar, etc.
    - **Cleaning:** Spend 10 minutes decluttering your workspace.

Annually

- Review office organizing and cleaning habits annually and consider needed adjustments
- Consider buying new office supplies or replacing old ones to simplify these habits

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