How Do You Keep Your Office Organized?

So, I went from zero to all this work in about two years. I am NOT complaining, I feel very very fortunate that my hard work is paying off. But, I don't' know how to keep myself organized. I get paper every day and I don't know what to do with it. I can't go paperless because our courts work on paper. I have to bring paper to clients. But I need a system that actually works. If you have a manner or method of handling the chaos in your office please let me know what it is. I am DYING over here.

Whatever method you choose, for prioritize and put away. You have to create a designated "place", online or physical for types of paper.

Scanner, of course. Then, be ruthlessly pragmatic about what you will ever actually look at again. After that, strict shelf-life policies, so that you have to "deal" with paper before it turns into a stinky fish file. Last, time block every day or every week to deal with the shelf-life issue. 15 minutes a day works for some people. Other people, an hour each week. Others- and sometimes me, a half a day each month.

I keep aiming for continuous organization, but I'm a batch processor. Friday is an office clean up.

Good luck, patience, and bring flowers into your office because it works, you'll keep it more organized and less cluttered!

Barbara Nelson, Notta Lawyer, New Jersey

HAHAHAHAHAHA!!

Oh. You were serious.

With paper files, I think 3-ring binders are better than top-punched.
Easier to insert and take out the 35th page. Easier all around to handle because it stays open.

Use e-mail and pdf a lot. That creates a written record so you don't have to take notes as often, and it's already in your computer for a simple click-and-drag to the client's folder.

Scan the rest and file accordingly.

And, for Pete's sake, copy that file to another drive. I have two external HDs, I'm that scared.

CJ Stevens, Montana

About 4 years ago myself, my assistant and my paralegal wrote a very detailed Staff Manual for our office. It is a guide to daily operations. Every time I hire someone new I make them spend the first day reading this thing. Then when they make a mistake or have an issue for probably the first six months I remind them that they should be checking and rechecking the Staff Manual before they take on a task so they know the proper procedure for doing things. It is a helpful training tool for staff but also for yourself because you are firced to figure out how you want to run your iffice.

It discusses everything from the organization of our paper files (they are color coded) to what we do with checks, credit cards and cash payments (and bank receipts) and how we preserve emails in our files. It deals with how people have to prepare for a vacation (vacation memo). It has daily tasks for attorneys and staff that they are expected to do as part of their jobs without me breathing down their neck every second. I have shared a redacted form of this manual with a few Sezzers over the years and would be happy to send you a copy. Our already redacted one is probably 3 years old and I can send that out this weekend or else we can redact private info from the updated one and get it to you in about a week. Or we can send you both. The new one is better and more refined but the old one wasn't bad. You will have to refine it to your own preferred processes and procedures anyways.

Michelle Rozovics, Illinois

Michelle,

May I respectfully request your updated copy when available.

Thank you!

Jim Pardue, North Carolina

Assistant who is organized. Bam, done.

Not really "done". Building communications and procedures for getting assistant's work to you and your task list to your assistant takes effort but it is worth it.

Amy Clark Kleinpeter, Texasw

I get paper everyday too, but I scan it into a folder on my computer, then send the original to the client or shred it depending on what it is. I keep files on my computer by courts I practice in front of; in each court file I keep client files by Last Name, First Name; each client file has a number of sub-files automatically created whenever I open a new client file, such as County Attorney, Court Orders, Letters, Probation, Discovery, etc. When i close a case, I move the client file to Former Clients which has sub-folders by year; 2009, 2010, 2011, etc.

I don't keep originals of anything; I give them to the client to hold. If, on the rare occasion, I need something as an exhibit, then I keep it in a manila folder on my desk until court. That rarely happens though.

D.A. "Duke" Drouillard, Nebraska

Hey if anyone wants to give feedback (or donations to our party fund) we will take it. I won't just post it though bc I like to keep tabs on who I have given it to.

We are constantly updating. I tell my assistant to keep an email folder of all the emails reflecting procedural issues we run into throughout the year and then hopefully we can go back and revisit the manual once a year or so with updates and refinements. It isn't quite where I would like it to be but it is getting there.

One diff bt the early version and the later one is that early on i lived in the law firm but now I have moved out. So initially we had rules like don't go upstairs and don't come to the office after hours without calling first. Then when the firm took over the 2nd floor it was simply don't go into Michelle's bedroom. Now all that is gone because I moved out last October.

Michelle Rozovics

I just spent all night organizing my office. Literally. It's 4 am here and I mine as well not sleep. I just moved into a really big office that I share with another company. We took up the back corner of the building and I have about 20 more boxes to go through.

We are pretty much a paperless except for those 20 boxes. :) I give everything to my assistant in manila folders with post it note instructions on where to save things or ehat steps to take. Every staff member has an 8 divider file organizer on their desk.... (not sure what the technical term is)

In the last divider, I give them file labels and blank manila folders. This way they can write on whatever they are working on that is a work in progress. IE: awaiting documents from client or settlement check from insurance company. In the first divider they have a phone log as to track all calls and so they can keep a carbon copy of things.

They all have cube post it notes on their desk so they don't lose the post its. A post it dispenser will also work.
They are only allowed one yellow pad at a time. I told them to write down every task and cross it off when finished. I used to go around and clean up after them and their numerous yellow pads which would drive me nuts.

We have everything in storage organizers from Walmart. The Sterilite kind. 6 small stationary bins the 6 medium roll about plastic bins. We put all supplies in organizers. Small storage organizers hold binder clips, paper clips, push pins, and metal fasteners... large storage organizers hold post its, batteries, stamps, canned air, printer cartridges etc. Each bin is labeled.

On the walls we have white boards and we use art tape as line guides. All files are notated accordingly with pertinent info IE: Defendant's attorney, court date etc. Then I can glance over and see the next step.

We also use a program to handle all of our short sales since we do a lot of real estate. It reminds the staff of the next step etc. It also helps when one person is out and another person has to handle the files. This way the person can jump in where the other person left off.

We calendar follow ups on all leads and I have a person specifically set up to follow up on all leads. The folder has my notes on past conversations that I had with the prospective client. I also have tickler files for all leads as well.

We use google calendar right now and google contacts, but I will probably be changing to a CRM program called Infusionsoft when I come back in September from my vacation. I will have 1 to 2 people dedicated to input my contacts and will have someone else to supervise. That person will also be chained to my desk all day so they can ask me how to categorize a questionable contact. All contacts are categorized and notes are made in each contact.

We use categories like where did the lead come from. Which Attorneys address book did the lead come from, are they a bankruptcy, PI, from our website, AVVO etc lead.

We have a business card scanner and use it accordingly then throw the card away once scanned and categorized. I am like the NSA when it comes to info...my marketing teacher taught me well.

We ask all clients to recommend us on all of our websites. We have a template of the entire list.

For expenses we have a clipboard for stamps and it has several sheets on it so that you can write down the matter, date, postage amount what was sent to whom etc. We also have the same concept for mileage log in the car and one at the office and also wiznet efiling costs. When the sheets are full I give it to my assistant to reconcile.

Each case has folders. Hard file has folders. I only file what is printed and what the client gave to us. The computer file is also the same. We start from a template file and make copies as new clients pop up. We put all costs on a spreadsheet. This is where my assistant can input stamps and efiling costs. We use online backup to two companies. After the file is done I make the client sign for it and take it back. I will keep items such as settlement agreements and stipulations, affidavits, etc. that I deem important.

We have binders for other info such as document codes, how tos, and sample pleadings. We also have one on the computer. We used to have how to videos but I have been lazy to update our youtube channel.

I email staff items to do regularly. I have to get it out of my head. They star items if they are important and must do later. Then star it a different color if they are awaiting something. They also archive the message when done. They use labels as well.

We scan everything important in then file it in the hard file.

I have two virtual assistants that file and save things for me. They can also draft letters for me, copy discovery, retype it, do data entry and real estate contracts. They work when I am asleep then notify me via email when things are done so I can review. They are a god send and I want to hire a few more when I get back. People are amazed when they see us working at 2 or 3 in the morning. Lol.

My staff is trained to email me on everything and email me to confirm they have received something or done a task....

We use ringcentral and the app is pretty cool as I can dial from my cell when out. I can also get texts and faxes...it has a conference call feature and can ring me simultaneously as my office staff.

My assistant does all my bookkeeping and enters it into excel spreadsheets and files receipts for me.

I believe in being as techy as possible with everyone getting two monitors. We are changing from laptops to desktops soon. If it saves time

I will buy it whether it be faster internet to some gadget....

We have a ongoing file of all marketing ideas from newsletter ideas to mailers, to Christmas cards. I am going to hire someone to implement these ideas one day....

Closing files have checklists as to what documents need to be included and whether or not we have those items. These checklists are in a binder

I will post as more ideas pop into my head, but for now I am signing off. S

Sandy Van, Nevada

Right as I was about to shut down my computer, I thought of two other things.

I always keep lists, I have little mini whiteboards the stick on kind on every door from my vanity closet mirror to the fridge at the office. I write everything down. I also carry voice recorders and hang them everywhere from my key hook, to bedroom, to office to car.

I have ADD, literally and these are my coping mechanisms otherwise I would be a walking mess and forget everything. As you can tell I may have a little OCD. Someone should open a store for ADD people... they would make a killing. I have 3 to 4 of everything from sets of keys, identification, and voice recorders.

Sandy Van

Thanks everyone. I am taking bits and pieces of what everyone here as said and will try a bunch of things to see what works for me. I loved the idea of the notebook for calls and potential clients. I mean, so simple but makes so much sense. Also, the legal pad in each client's file. I also hired someone to help out part time. I just really need the extra set of hands. I will check in in a bit and let you know how it is going.

Mirriam Seddiq, Virginia
