



Office Management

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Strategies for your multi-faceted business

By Rhoda P. Erhardt

Occupational therapy practitioners are now finding themselves involved in a wide variety of professional activities in addition to clinical practice, including consulting, publishing, presenting and even creating new marketable products.¹ This article addresses additional important components of managing your business life by suggesting ways you can:

- analyze your own organization style,
- acquire more efficient office managing procedures, and
- increase productivity by planning each day to match your unique rhythms of work and play.

After reviewing articles and workshop notes I had collected over the years, searching Internet sites and interviewing others, I realized that the Occupational Therapy -Practice Framework² includes certain components from the categories of "activity demands" and "performance skills" that can help organize:

- space and object management (relating to physical context),
- time management (sequence and timing) and
- communications management (snail mail, voice mail and e-mail).

While researching this article, I found myself challenging many of the assumptions that we often accept without question, such as "Set aside specific times of the day to complete certain tasks." I have read this often as advice to writers—for example, that they must promise themselves to complete a certain number of pages every day. Balderdash! How can the creative spirit work in that restrictive environment?

Those of us who have learned to be sensitive to our individual rhythms know that we are way more efficient if we respond to what our own bodies are telling us in the moment. Yes, we need certain routines to be able to function in an interactive way with others, but we can also find many opportunities to make choices by asking ourselves a sequence of questions:

- 1.How am I feeling right now?
- 2.What do I feel like doing?
- 3.What needs to be done that would be enjoyable as well as productive?

Space/Object Management The Feng Shui Office

The basic principle of Feng Shui is about chi, the spiritual life force, an energy that should flow freely through a space. Certain colors, plants and the elements of wood, water, fire, metal and earth symbolize specific ways of achieving aspirations such as strength, honesty, vitality, a successful career, longevity and good health. If your office is designed with these principles in mind, you should be able to think without disturbances and more easily achieve your projects and goals.³

Four examples illustrate certain Feng Shui principles:

1. Place your desk facing the door so you can see if someone enters.
2. Windows, especially those opening outward, allow the entrance of natural light in the room and help you feel relaxed and comfortable.
3. The area directly in front of where you sit at your desk should be clear and without objects disturbing you.
4. Objects in general—and especially machines—restrict the flow of energy, so they should never be at the center of the room. A card table in the center of my office is a great place for "piling" of current projects. The shallow top and narrow legs allow a free energy flow.

The Virtual Footprint

Many experts stress the importance of placing office equipment and supplies so the ones you use most often are within reach. However, keep in mind that every object in your office has a virtual footprint typically larger than its physical dimensions. For example, a vertical organizer may be only 10" wide, 12" deep and 9" high, but the act of sliding papers in and out may require additional space, as does stapling a test booklet with a long stapler, or a paper cutter on the right side.⁴

Ergonomics

The relationship of desk/chair/computer is critical. Cumulative trauma disorders (CTDs) do not have to occur because of repetitive motions of arm, hand and fingers. Be sensitive to the first sign of discomfort and alternate tasks or select a different position or movement.⁵ CTDs and pain also result from movements that involve spinal rotation combined with the tension of reaching, holding and manipulating. By analyzing the action and its relationship to object placement, you can make changes to eliminate the problem.

Files

Many office management writers and trainers like to categorize people into "filers" and "pilers." I think most of us are both, with clear preferences for one method. The only real criterion for an efficient filing system is retrievability.

Of course, the efficiency of any management system depends upon how we organize electronic folders on the computer and hard copies in filing cabinets. One useful method for me has been the use of aliases, which take up almost no hard disk space. After I file a document in its primary folder, I can then make an alias so I can file it in one or more other projects as well.

Another useful tool has been the creation of a file titled "references". This database currently includes more than 1,000 citations of books, journal articles etc. that I own or have used as citations in published articles. I recently added a field named Where Filed—that is, the location of the print copy or electronic copy or both (of those I have, full text or abstract).

For example, articles I am requesting from Interlibrary Loan may be e-mailed to me in pdf format or mailed as hard copies. An electronic file will be stored in its current project folder on the computer; a hard copy will be stored in the corresponding paper folder. After the project is completed, I move the hard copy to a cardboard box labeled Feeding, so it is retrievable for new projects.

Toss or Keep

Finally, to really avoid the growth of clutter and resultant disorganization, make the Toss and Keep Test a weekly routine.⁶

1. Have you used this item within the past month/year? (Many of us ask this same question when we are cleaning clothes closets.)
2. Is it serving a specific purpose?
3. Do you have a place to store it where you will find it again?

Time Management

The most common complaints seem to be too much work, not enough time, and difficulty meeting deadlines. [Table 1](#) addresses these issues. Of course, a self-employed person will have much more latitude to utilize these solutions, but everybody has the ability to modify his work style to some extent.⁷

Sherry Shellenberger, OTR/L, co-owner of TherapyWorks Inc. in Albuquerque, NM, has an effective time management solution. No matter where she is, she always brings something to read, usually articles that normally just keep piling up. Even she is surprised how many of the articles she really wants to review can get read in 10-15 minute blocks while waiting, especially at appointments.

To-do Lists and Calendars

Paul Hill, accounting manager of Graston Technique® in Indianapolis, IN, recently presented to his staff a planning process using two different task lists: master and daily. [Table 2](#) gives examples of items in those lists. After priorities are set, the process is tracked with symbols indicating task status (completed, in process, moved forward, returned to master list, delegated or deleted).

Some productivity experts, however, say you don't need a to-do list.⁸ Instead, use a calendar, only one, and keep it with you at all times. Use this single scheduling system for all appointments, meetings, errands and phone calls (conference, proactive, return call or expected call), as well as personal events (medical appointments, children's ball games, parties, etc).

During the first 20 years or so of my career, I carried a date book and a small notebook, and each day transferred information back and forth from the to-do list in my office. I wrote every single task on that pad, and crossed off each one when it was completed, an act of great satisfaction. For the last 20 years I have used the Daytimer two-calendar system (portable and desk), because I still like the security of backup. When a task is completed I circle it, rather than drawing a line through it, so it is legible if review is needed.

One of my favorite tips is simply to use pencil instead of pen on calendars. You can erase tasks that are not completed and move them to a different day and time. No more scratched out, illegible and messy pages.

What about portable electronic devices that eliminate almost all this writing? If I were as active in my career as I was 10 or 15 years ago, I would surely incorporate a PDA into my busy life. However, Gail Baev, an insurance claims attorney in Woodbury, MN, who depends on her PDA for everything, tells me she still likes to have printed calendars to view an entire week or month at a glance. Visual/tactile learners like me know that the act of writing seems to imprint memory so well that reviewing the written word is often unnecessary. Recording and playing back to-do items may be most efficient for an auditory learner.

Melissa Cohn, OTR/L, FAOTA, president/CEO of Dynamic Learning Online, Inc. in Oldsmar, FL, has used legal pads in the past, but she is now committed to a system that synchronizes her computer software, PDA and printed documents. Design a system that is dynamic, open to new ways of organizing and permits the integration of new ideas around your own learning and self-management style.

From Lists to Communication

Mary Sue Williams, OTR/L, the other co-owner of TherapyWorks Inc., discovered that her most common problem was losing track of details in communications when she emailed, phoned or faxed someone and was waiting for their response. She adapted her own "Waiting For" list ([Table 3](#)) based on the "Getting Things Done" action management method.⁹

Communication Management

Which methods of communication are most appropriate for different situations? Snail mail is the best way to send complicated and original materials. Voice mail is ideal for delicate business, when face-to-face is not possible but emotions need to be conveyed. E-mail conveys key information quickly, confirms appointments and documents decisions.¹⁰

Snail Mail

The first office management seminar I ever attended offered this primary rule: Try to handle each piece of mail only once. I don't think so! My procedure is to sort or process each according to its category:

- Trash
- Processed within the next 30 minutes (easy or important)
- Current work folders/piles (on the card table)
- Reading pile (for review during muted TV commercials)
- To be filed desk bin (when I am in the mood)

Voice Mail

What is your relationship with your telephone?

- The phone rings constantly and therefore stops you from doing your work.
- You're ecstatic because it rings with inquiries and orders for your services and products.

- You have suicidal tendencies because the phone doesn't ring and nobody loves you.¹¹

How frustrating it is to get someone's voice mail repeatedly, and worse when you actually leave messages that are never returned. A follow-up message delivered in a friendly tone can ask for clarification. For example: "I'm not sure if you received the message I left on [date]. Please tell me a good day and time for us to speak on the phone about [topic]."

A similar procedure is effective for e-mail messages that are not answered. You can simply forward the message and add the words "Please let me know if you received this message."

E-mail

Some people delete their e-mail messages as soon as they are printed and/or answered. Others store them in a collection of e-mail folders. I do delete incoming and outgoing messages as soon as possible, but not before copying and pasting almost all of them into appropriate text files.

I agree with productivity coaches who say to keep important messages stored electronically rather than printing them.⁶ There are several advantages of copying e-mail messages to text files instead of organizing them within mailbox folders.

- Your e-mail box does not get filled, cluttered and disorganized with messages and folders.
- You can always find a certain message because it is saved in a person, agency or project file, and can be retrieved with a Find of name, date or even subject matter.

From Analog to Digital

Brooks Peterson, PhD, who founded Across Cultures in Minneapolis/St. Paul, MN, decided to go digital in a big way. For example, he scans receipts and records when possible to avoid stuffing up a filing cabinet, and regularly backs up his computer files to two external hard drives, with one in a fireproof safe. He says people are afraid to trust computers because they mysteriously lose things, but a file cabinet or ledger book can burn in a fire, get soaked in a flood or get lost.

Vickie Meade, PT, DSc, MPH, PCS, is a physical therapist in Kosrae, Micronesia. Before she moved from Minnesota to the Pacific Islands, she scanned all her research articles to CDs and converted all her instructional videos to DVDs. Her plan not only reduced impossible shipping costs, but is now saving office and storage space.

Using Management Solutions

So how do you deal with issues that cross space, object, time and communication, especially since most of them involve technology? For many of us who learned computer skills later in life, keeping up with changing technology is a real challenge.

According to Chuck Hauge, MBA, principal of CPH Solutions in St. Paul, MN, and my personal computer consultant for more than eight years, it is critical to research, study and learn in order to make technology understandable. I attend seminars, read trade journals, download articles and join user groups. Most importantly, I have chosen a "tech guy" who listens before giving advice and explains how he is fixing the problem, so I can become increasingly independent. Occupational therapists are not the only professionals who know how to empower clients.

A future article will describe how to design and/or adapt an entire home/workplace to reflect balance in personal and professional life, using concepts of form following function, universal design and more Feng Shui principles.

References available at www.advancweb.com/OT or upon request.

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