

# The Ultimate Checklist to an Organized Home Office Space

Thank you for downloading my *Ultimate Checklist to Organize your Home Office!*

Don't get scared! I've broken down the tasks into phases and small steps, to make this process manageable. You've got this! Here's to the journey ahead!

**P.S.** Use the "notes" areas for journaling, making lists, etc. as you go through this process.

## Who am I?



Hi there action-taker! My name is Jennifer Vaaler and I'll be your guide as you simplify your work space - whether that's a room with a door, a desk in your bedroom, the kitchen table, a co-working space, or mobile office.

I'm your Business Productivity & Home Office Efficiency Coach for online **Coaches, VA's & Thought Leaders who work-from-home and/or travel**. I help them go from overwhelm to calm and order, so they can focus on what they love, give back, and earn more money.

With a background in business, interior design, organization, and coffee shop efficiency, I offer a unique skill set and insight to help you create an office you love that is inspiring and functional and help you best utilize your time. Time=Money. I want to help you get more of both.

What does a coffee drive-thru have to do with your home office?

Before I started this business, I was in the high-end coffee industry for over a decade and decided to take all I knew and have two coffee drive thrus. I had to really get organized and make the most out of the tiny space that utilize any storage space, increase efficiency for faster service, and stay on top of inventory, ordering, hiring, marketing etc. This forced me to become super organized, get rid of what wasn't needed and cut costs, and increase customer service.

With my "highly efficient coffee shop" concept, I apply it to an office setting, that creates order and flow to increase productivity and sales.

~Jennifer

# *The Ultimate Checklist* to an Organized Home Office Space

First, rate yourself on a scale of 1-10, 1 being the lowest and 10 the highest, of where you are at this point in your office.

## **Rating #**

- \_\_\_ How organized is my Office Space?
- \_\_\_ How cluttered is my physical space?
- \_\_\_ How cluttered is my mental space?
- \_\_\_ How organized am I now vs. when I started my Business?
- \_\_\_ How organized is my desktop?
- \_\_\_ How much do I love my office space now?
- \_\_\_ How productive am I when working?

## **How do you want to feel once you're done cleaning your office? Why?**

## **Main Goals for simplifying your Office:**

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_

# The Ultimate Checklist to an Organized Home Office Space

## Before You Begin

- Schedule** 15 minutes - 1 hour/day to clean up and organize your office and accomplish over two weeks, or up to three months.
- Mindset:** The upfront work will make life easier long-term. This is a process and doesn't need to *happen overnight*.
- Take "Before" Photos** so you can compare photos and see your progress
- Put your favorite music** together to help make this process more fun.
- Keep the end in mind.** Imagine how much easier your life will be once you're done!
- Make space** on your floor (or in boxes) for sorting - Sort your stuff into "like" categories (make a list of these as you go) For example: "other room," office supplies, business finances, personal finances, etc.
- Get a trash can, recycle can and shredder**
- Set a timer** to see how much you can accomplish within your time limit

-> **Reminder:** Don't buy anything for organization until the end! Utilize what you have first.

## Questions to ask yourself as you declutter:

- Does it belong in my Office?
- How important is the item or paper?
- How often do I use it?
- Do I need to Keep, Recycle, or Shred the paper?
- How many do I really need for everyday use? (office supplies)
- Can I donate it to a child or teacher?
- How many (office supplies) do I really need on my desk? (no more than 2 of each)

## Notes:

# *The Ultimate Checklist* to an Organized Home Office Space

## **Declutter your Desk & Drawers**

This is where you work, so if nothing else is done, at minimum you'll have a clean desk to work on.

Think of your desk as the "kitchen sink" of the office. When you start here, it helps you gain momentum to move around the room.

- Clear your desk to start from scratch
- Wipe down your desk with disinfectant (when was the last time you did this?)
- Clean out your desk drawers
- Put paperwork in a pile to sort in the next phase
- Put extra office supplies in the Donate pile to donate to a classroom, schools, etc.
- Put items back in their appropriate room, if they don't belong in your office
- Take your first "In progress" photo

## **Questions to ask yourself as you simplify your office:**

- Does it belong in my Office?
- How important is the item or paper?
- How often do I use it?
- Do I need to Keep, Recycle, or Shred the paper?
- How many do I really need for everyday use? (office supplies)
- Can I donate it to a child or teacher?
- How many (office supplies) do I really need on my desk? (no more than 2 of each)

## **Notes:**

# *The Ultimate Checklist* to an Organized Home Office Space

## **Organize Your Desk**

To prevent clutter, only keep on your desk what you use daily and papers, notebooks etc. you're using for the current project you're working on. This helps with focus and easier to tidy at the end of your work day.

### **Things to keep on your desk (used daily):**

- Writing utensils - test all pens, pencils, & highlighters and toss any that no longer work
- Paper Planner
- "In progress" and urgent desk filer (covered in the next phase, below)
- Re-organize your desk drawers and label as needed

If your drawers do not have dividers, be sure to find one or create one out of supplies you already have. Get creative!

- Put like items together & limit drawer items to things you use regularly + one backup, so they are within arm's reach.
- Set up a Bill Pay prep area with envelopes, stamps etc.
- Take your second "in progress" photo

### **Notes:**



# *The Ultimate Checklist* to an Organized Home Office Space

## Paper Clutter

### Sort through your paper pile

- File anything that is essential to record-keeping or that you will need to reference in the future.
- Toss & Shred papers you no longer need (keep receipts up to 6 years for business (scan if needed))
- Set up a clear file folder for Bill Pay/To Pay
- Set up a desk file organizer for “In Progress,” “Follow-up,” paper to current projects you’re working on.
- Recycle any outdated letterhead, business cards, etc. o Gather all post-its, notes, or flyers and add them to one master to-do list and your calendar as appropriate for you.
- File your Papers based on the sticky note categories and current workflow
- Take your third “In progress” photo

## Notes:

# *The Ultimate Checklist* to an Organized Home Office Space

## Organize your Office Space

Items you use Monthly or less can go in drawers, on shelves, in the closet or on bookcases.

- Organize your cords
- Organize backup office supplies
- Re-organize Bookcases
- Re-organize shelves
- Dust picture frames and shelves
- Sweep or Vacuum

## Organization Ideas:

- Are you “Out of sight, out of mind” like me? Use clear folders and color-code as needed.
- Cover shoe boxes with scrapbook paper or craft paper for storing supplies
- Magazine organizers are also great for file folders
- Small crates make great book shelves and are stackable
- Use a small dresser as extra work space and for desk drawers (do you have one in storage or don't use?)

**Reminder:** Buy only what you need, as you need it. When you DO buy new décor and organization bins/shelves, etc. be sure to get rid of the old (toss, sell, or donate)

- Take your fourth “In progress” photo

## Notes:

# The Ultimate Checklist to an Organized Home Office Space

## Digital Organization

Set up new folders on your computer and anywhere you backup your current files. Set these up based on how YOU remember things and your workflow. The example will get your started with ideas.

An example of my digital filing system goes like this:

- Business
- Finances
- Contacts
- Projects
- Clients
- Branding
- Copy
- Marketing Campaigns
- Personal
- Finances

Now that your folders are set up, use your version of this system across all your devices,

and wherever you save and backup your files. This makes it easy to find them.

- Backup all current files from your phone and computer to an external hard drive Dropbox, or other cloud program.
  - Scan receipts, business cards and important documents onto your computer, Evernote or Dropbox as a backup. Also scan papers you want to reference regularly.
  - Move your files into their appropriate new folders
  - Rename files so they make sense for you to search for them. For example:
    - Keywords
    - People in photos
    - Topic
    - Business
    - Personal
    - Dates



# *The Ultimate Checklist* to an Organized Home Office Space

**Congratulations on this HUGE accomplishment! I know it was tough, but you did it! Wahoo!**

**P.S. Didn't get as far as you'd like but you're determined to finish?** Then check the next page to find out how I can help you accomplish your organized office goal.

Rate yourself on a scale of 1-10, 1 being the lowest and 10 the highest, of how your office compares to when you started this journey.

## **Rating #**

- \_\_\_ How organized is my Office Space?
- \_\_\_ How cluttered is my physical space?
- \_\_\_ How cluttered is my mental space?
- \_\_\_ How organized am I now vs. when I started my Business?
- \_\_\_ How organized is my desktop?
- \_\_\_ How much do I love my office space now?
- \_\_\_ How productive am I when working now that everything is clutter-free?

## **How do you feel now that you're done decluttering and organizing your office?**

## **What steps will you take to prevent clutter in your office?**

- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_

# The Ultimate Checklist to an Organized Home Office Space

## What's Next?

### Get it out of the house

- Take the **trash** out and ready for pick up
- Take the **recycle** out and ready for pick up
- Put items in their **proper rooms**
- Take **donations** to your preferred organizations and people
- Take important documents to a place for **shredding**, or when you're ready to empty the shredder, most recycling programs will ask that you put shredded paper in a larger container, such as a paper or plastic bag. You'll want to check locally for your city's instructions.

## Need extra personalization and accountability?

### Personalized 1:1 guidance and accountability

#### Need some extra help and accountability getting your space decluttered?

I'd be happy to guide you through this process through Virtual Coaching via Zoom. [Book your Discovery call today!](#)

#### I offer two options:

- 1) Need recommendations on how to start, or reorganize your office space, but want to DIY?**  
Then my [Home Office Design Consult](#) is for you!
- 2) Need personalized guidance and accountability through the decluttering and organizing process, from start to finish?** Then my [personalized 1:1 Organizing Coaching](#) is for you.

I'll coach you through the entire progress of decluttering (if needed), getting organized, and setting up filing system your office space so you can find what you need, when you need it,

[Discover more](#) about how I can help you. Together, we can finish getting your office from clutter to calm so you can focus on income generating projects, gain back time, and earn more money.