



CUSTOMLIVING
SOLUTIONS

The Profitable Productivity System

Simple, Proven Strategies to Get Organized and Boost Productivity!

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For more information on other programs and services, email us at
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INTRODUCTION

Nightmare - Imagine this. You walk into your office. You trip over a few boxes on the way to your desk which is covered in paper. Before you can even sit down the phone rings. It is a client you saw a few days ago asking about the notes you were going to send her after your session together. You cannot really find your notes so you have to tell her you will call her back later. You spend the next two hours searching everywhere for the client's file but it is no where to be found. Embarrassed, you call her back and tell her that unfortunately you have misplaced her file. She says that she feels like her relationship with you just isn't working. So she decides to let you go. Ouch.

Dream - How about this scenario instead. You walk into your office and as soon as you open the door you instantly feel at ease. You love this space and can't wait to work at your clean, uncluttered desk. The phone rings. It is a client thanking you for sending her follow-up notes from your last session together. Before she hangs up, she says she has a colleague whom she is going to refer to you. As you hang up the phone, you are so glad you took the time to get organized because that made all of this possible.

If you'd like to get similar results in your own office, this system is designed just for you.

In this system we are going to look at different strategies, easy ways to help you get and stay organized in your office, so you can boost your productivity and get maximum business results.

We are going to talk today about some introductory steps in the system and about the first piece of the process which is **PLANNING**.

But before we get there, it is important to know a few things about why you want to get organized. I'll bet that if you are in business you are trying to look for ways to save time and money. Getting organized can help you do just that. So let us first look at how much being disorganized is costing you. Whether you are super disorganized or even just a little, anytime that you waste looking for things that are lost in your computer or on your desk in your space or anything that you can do to make you more productive is going to save you money.

Cost of Disorganization - Let's look at a formula to see how much disorganization is costing you. First, think about how many hours a week you spend being disorganized. Maybe it is half an hour looking for papers; maybe it is a few hours trying to search through your phone records. On average, how many hours a week do you spend being disorganized? Then write down how much your hourly billing rate is; how much you charge clients per hour. And then let's figure out your total cost of being disorganized per week. So multiply your hourly billing rate times the number of hours per week that you are spending being disorganized. That will give you how much time per week being disorganized is costing you.

Then if you want a really scary number, take that number and multiply it times 52 weeks in a year. That number will give you how much disorganization is costing you over the entire year. Probably a pretty scary number. Even if it is relatively small, wouldn't you rather be generating



that income rather than losing it by being disorganized? So that is the kind of thing that we are going to help you do in this system.

Why get organized? Before you spend time with the 'how to get organized', let's talk for a couple of minutes 'why' you want to get organized in the first place. Obviously the exercise that we just did, which is covered in your workbook, lets you know that being disorganized costs you money. So when you get organized you are able to save time and money by either being more productive or being able to find what you need when you need it. So saving time and money is one of the key reasons why people tend to want to get organized.

Another reason people get organized is because it saves space. If you are working out of your home or you are in a relatively small office, every inch is at a premium. You want to make sure that you are using your storage and your space most effectively. When you are organized you will be able to know where all of your things are; they will be put away in a way that makes sense for you to access them, use them and put them away. And you will be maximizing your investment in your space.

Also getting organized can make you feel more in control; feel more empowered in your work life. When you know where your things are; when you know how your schedule is going to go for the day; when you are able to easily find a piece of paper when a client calls you - that is really empowering. It makes us feel more professional. And when we feel empowered and we feel more professional, we do our best work and we are able to serve our clients at our very best. So getting organized can help you be a better professional at what ever line of work you are in.

Take a few minutes and think about what some of the reasons why you would like to get organized are. And note those down in your workbook.

One of the things that sometimes comes up when I am working with new clients is that they are concerned that somehow getting organized will remove their creativity. But I am here to tell you that that simply is not the case. Rather, what often times happens is people get organized and during the process they let go of the things that have been creating chaos for them - where they had been cluttering up their space or their mind or their creativity. And by the time we are done working together, often clients tell me that they are so surprised and amazed that they are more creative than they ever thought possible because they are no longer worried about all of the little details that they previously had had to keep track of. Everything is organized in a system and they can finally focus on what is important to them.

So if you are concerned that getting organized is going to put you into a little box or make you feel stifled or uncreative, I am here to tell you that that just doesn't happen. Rather expect to be empowered and do your most creative, your very best work by the time you are done getting organized.

Expectations of being organized - Now let's set some realistic expectations about what you can hope to achieve in the world of getting organized. There are lots of magazines and books



and TV shows where they show pristine rooms and offices and clear uncluttered desks where coincidentally there are no people in those pictures. There is no work actually being done. That isn't reality. Those are staged pictures. They are not reflective of what people actually do in the real world when it comes to work. In the real world people often have papers on their desks when they are working. Sometimes they have a few items that they are actually using in the course of a business day. And that is OK.

So don't expect to achieve the cover of a book or a magazine by the process of getting organized. That is not what we are going for. Of course a clear, clean aesthetic is great. Don't get me wrong. But if that is not what's in the cards for you, shoot for something else. Shoot for better than things are today; more productive than things are today; less clutter than things are today. Any improvements you can make can have a dramatic effect on your productivity.

Look for the things that you can do that are realistic for you. Because shooting for the cover of a magazine just doesn't work. And it can set yourself up for an unrealistic expectation and you won't feel good about the progress that you are making. And believe me any progress is good progress and can help you get towards being better organized.

Elements of the Organizing Engine - Now that we have talked about some of the basics of why you want to get organized in the first place and what you can expect from the organizing process, let's talk about how this system can help you and what's included in it. The different elements of this system include planning.

Planning - Planning is where we plan out your system for how you are going to get organized; what actions you will be taking and what some of your goals are.

Pruning - The next step in the system is Pruning. What I like to think of is editing through your belongings or going through a treasure hunt. This is where we weed through what you have so that we make sure that you are actually storing and organizing only the things that you actually need, want or use.

Space - Then we will look at some spatial issues - how to best arrange your work space; how to create the best desk environment for your productivity; how to put your things in a way that makes sense for your business and how you are going to use your things.

Paper Management - Then we are going to look at one of my favourite topics - paper management. Since most of us have paper, we all need to find ways to deal with it. We have an entire segment devoted just to dealing with paper - how to manage it, how to process it and how to get rid of it in some cases.

Time - Then we are going to be looking at time - how about ways to manage your schedule; different strategies for managing your tasks and delegating them to others in some cases.

Technology - Then we will look at technology tools - integrating, organizing into technology is really important because virtually all of us either use a computer or a smart phone and we need



to find strategies so that these systems and these tools make sense for us.

Maintenance - And then finally and this is key, Maintenance - how to keep up your organizing systems over time so that they continue to work for you and we are able to adapt them and change them so that they will serve you well into the future.



PLANNING

The first part of our system is planning. That is where we set the foundation for the work that we are going to do together.

Goals - In your workbook there is a page that is called Goals. Filling out this page is really important because this is where we touch on all those things that motivate you to get organized in specific detail. First it is important to note what does being organized mean to you. For some people it means an aesthetic - things will have less clutter, my space will be clean and clear, my desk won't have any papers on it. For others it just means that they will be able to work more effectively or more quickly or more efficiently. So for each person being organized means something slightly different.

What does being organized mean to you ? Take a few minutes and write that down in your note book. Think about: what does organizing look like. When we are done organizing your space, how will it look differently? Will there be less paper? Will there be fewer things around? Will there be more storage? How will it function differently? Will you have different places to put things? Will things have homes when they may not right now? How about: how does this space feel? Would it feel different when you walk in the door? Would you feel differently when you are sitting down at your desk? That is an important consideration because that will give you some clues as to whether the process is working.

This is really important as well. How will you know when you are done with the initial process of getting organized? Is there a specific goal or target that you have in mind? Maybe it is that one of your bookshelves will be clear of clutter; maybe it is that there won't be papers on your desk other than the ones you are currently working on. What will it be for you? What will signal the end of the organizing process for you? Now of course organizing is ongoing. You always need to maintain systems that get put into place. But the work involved in that is relatively minimal.

What we are talking about here is when you are done with this initial push, this project of getting organized, what will be different for you? Note all of these things down in your workbook.

Challenges - Also in your work book there is a page called Challenges. This is important as well because everyone has challenges when it comes to getting organized. Maybe it is a lack of time; maybe you don't have a whole ton of time to sit and get organized or maybe you have an unsupportive or just plain unhelpful business partner or spouse, if you are working in a home office, who does not understand the value of getting organized and what it can do for you. Maybe you just don't have any skills around organizing yet and you are looking forward to learning those, but right now they are not yet in place. What ever your challenges are note those down in your notebook.

Then next to them note down what support you are going to get for overcoming those challenges. Because even though this system has some great strategies and ideas for getting organized, unless you come up with some ideas or support or structures for getting support for those obstacles so that you can overcome them, you will have limited success with getting



organized.

So for instance, if one of your challenges is lack of time, look in your calendar for when you may be able to carve out an extra 5 or 10 minutes - maybe not a whole day, maybe just a few minutes - for getting organized. Because that is something that you can build on. Whatever your challenge areas are look for strategies that can help support you in the process so that you can get organized and function at your very best.

Assessing your space and needs - Once you have determined what some of your organizing goals are and what some of the challenges that you need to overcome are, then you are ready to actually start the process of planning out how you are going to get organized. The first thing that needs to happen is you need to do what is called a '**Needs Assessment**' of your systems and your space. This helps determine what needs to happen in order for you to get more organized. What specific changes you need to make in order to get from where you are now to how organized you would like to be. To do this we use a tool called the **Assessment Challenges and Solutions** form. This is in your workbook.

On this form you will see that it gives a name for the space that you are going to be working on - let's say it is your desk or maybe your home office - and there are two columns. One for challenges or problems and one for solutions. Using this form take a tour of the space that you would like to get more organized. Write down each of the specific challenges that you notice in the space. Try to look at this with a fresh pair of eyes as if you were someone walking into your space for the very first time. What do you see that could be changed or could be made better. What do you think about the different systems, the different tools, the different pieces of furniture that are there? Do you think they are working; do you think they are not? Note down the things that you notice that could be made better. Note them down on the challenges side of the piece of paper. Then on the solution side write down a few ideas for what you think might work better. Or changes that could be made to help the systems improve or the space work will get more organized in a more effective fashion.

For instance, let's say that we open the door to your office and the first thing you notice is that there are papers on the floor. Obviously that is a challenge. For many people that would be a problem. One of the solutions might be: look for new homes for the paper. Or read through the papers to reduce what's there. Another solution might be find a different storage solution for the papers so that they have a space on the desk. So for each of the challenges that you notice, brain storm different ways that you might be able to overcome those particular challenges or problems and write those brainstorm down in the solutions side of the page.

Of course you haven't gone through the whole system yet so you may not know what some of the potential solutions might be. But at least at this point you can write down what some of the challenge areas are so that as you are listening to the rest of the programme you can start to identify, 'Wow! That is a strategy that might help for that particular issue.' Or, 'There is an idea that might fit for that problem that I've been having.' At least if you have identified the challenges and the problems, it gives you a head start for the type of work that you will be doing when you do the rest of the organizing project.



So you may want to fill out one of these assessment forms for each of the individual spaces in your office. Let's say you want to fill one out for your desk top; you may want to fill one out for the information that is living on your computer; you might want to fill another one out for your storage closet or your bookshelf or the space as a whole. Fill out enough of these forms so that you've addressed all of the spaces in your office that are currently causing you a problem.

The problems can be large - like my entire office is disorganized. Or they could be small - I don't have a space to put my paper that needs to be shredded. Each of those, regardless of their size, still needs to be addressed. So don't feel like a problem is too big or too small for you to fill it out onto this form.

If a problem is really large, think about the different ways that you might be able to break it down into its components. So for instance, it is easy to say, 'Oh, my whole office is disorganized. I don't even know where to begin.' If you are really not sure where to begin just choose a spot. If you notice that the whole office is disorganized maybe you just walk into your office and just rotate clockwise through the space identifying each of the different components of what is there. So in a disorganized office there might be a cluttered bookcase; there might be overflowing file cabinets; there might be a desk that is covered with paper or with cables or computer stuff. Each of those can be addressed individually.

One of the challenges that happens when people try to get organized on their own is they often don't break things down into their components. They will say, 'Oh, I am going to organize my whole office this week end', without recognizing that within an office there are many different subsets of challenges or problems or things to overcome that if they are broken down into those components can be tackled much more effectively. So as you are going around your space, look for those different, smaller chunks that you can put on the list rather than the whole office or the whole space. Because that is not an effective way to get organized. So break things down into their components. You will be much more effective when it's time to actually tackle organizing them.

Action Plan - Once you have done the assessment of what is not working and you have come up with some potential ideas for solutions, then it is time to create your action plan for how you are going to actually attack the organizing projects that you outlined in the assessment form. In your workbook there are two pages. One is a master action plan which lists the projects or the spaces that you are going to organize. And the next page is a detailed sheet which lists the individual steps in a larger project.

How these work is this. When you are going to get organized you can't do everything at once. If you have ever tried to do everything at once you know that it is just not successful. It is just too hard. It is actually more effective to go down a list and tick things off one by one and make real progress. So the first page is a list of all of the projects that you are going to be doing as you are getting organized. The way that this is listed is in priority order. So you might choose as you are doing your assessment of your space - you know 'I just can't work at my desk anymore. This desk is driving me crazy.' If that is the case for you, make that number 1 on your priority list and



you can work on that first. You will probably notice other things during your assessment that may be annoying but they are not driving you crazy. If they are not driving you crazy, put them a little bit further down on the list of projects as well.

Another thing to look for as you are prioritizing: are there things that you can do right away that will help you generate additional revenue or help you keep from spending money? Those are things that I would likely put pretty high on the priority list because those are real financial consequences that can happen right away. So whether it is saving money or making more money those are things that are good for your business and it would be good to work on those sooner rather than later.

So the first page that lists 1 to 10 is essentially just a list of the different projects that you are going to be attacking and the order in which you are going to attack them. The next page which is the details page lists the individual steps within the different projects that you are going to be doing. So how this is broken down is into things to edit, things to sort, things to purchase or buy, things to move to another space and things that you need to do. Let's go through these one by one.

First things to edit. This is where you are weeding through your belongings and we will touch on this more in the next section of this system which is called Pruning. We will talk about how to do this. But in this action plan you are simply identifying the items that need to be weeded through or that need to be thinned out. So for instance, in your office, you might be looking to weed through your storage a bit so you can create room for more things. Or you may want to weed through your file drawers so that you can keep only the papers that you actually need.

Whatever it is in your space that you need to weed through or you need to prune, put it into the edit section here. After you have edited it, it is a lot easier to sort your belongings into categories because you are only left with what you want or what you need. So for anything that you are going to need to put into groups, list that down here in the 'sort' section. We will talk about this more later but there are such a variety of ways that you can sort your things - by topic, by category, by colour, by size, by type of item. Whatever those things are and your space that you are going to need to sort, list them down next to the check boxes here.

In many cases you will need to buy some sort of supply to help you get or stay organized - whether it is a new type of file cabinet, maybe it is a different storage system for keeping your pens or pencils on your desk, maybe it is a completely new desk or a new shelving unit. Whatever you have identified that is missing during your needs assessment, list it here as something to purchase or to buy or maybe even just a research. This will help consolidate all that information into one spot so that you will know that this is where you need to look when its time to think about making a purchase.

As you are doing your needs assessment you might have noticed some things that simply don't belong in your space anymore. Those would need to get moved some place else - whether it is a storage or maybe it is taken to a donation spot or maybe it is moved back to your home or into your car or into your briefcase. For all those things that you have noticed that need to go



someplace else, list those under the 'To Move' section next to the check boxes.

And then finally there might be some bigger things that you need to do or create as part of the organizing project in a given space. List those under 'To Do'. So for instance if you are working at your desk and you have noticed that your paper is not under your control any more, you might want to create a paper management system which we will go into later on in this system. But that would be a To Do because that is a larger sub project of this overall organizing your desk project. Anything like that, that is a bigger piece, list that under 'To Do.'

Finally you will note that at the end of the first page of the action plan and the details page there is space for notes. So anything else that does not quite fit into any of these other categories that you want to take note of, list it here. This is where you can keep track of anything that falls outside the realm of what is already needed.

Now that you have identified your goals, figured out some strategies for overcoming your challenge areas, you have assessed your space - what isn't working and what to do about it. And you have created a preliminary action plan. You are actually ready to start getting organized. Wasn't that easy?

So your next steps are to flesh out your needs assessment and your action plan and get them filled in as much as you can before moving onto the next step which is pruning. The more time you spend on planning how you are going to attack your organizing projects, the more successful you will be. So spend some time on this section. Make copies of the pages in your work book if you need to. But make sure you fill things out completely. It will give you a great foundation to start from as you are getting organized. We will see you in the next step which is Pruning.



PRUNING

Client Success Story - A client who works in the medical field called me in to help organize her offices. One of the challenges was that there is simply too much stuff. Every shelf, cabinet and surface was just overflowing with specialized equipment that they used to lend to their patients. With so much equipment around it was hard to keep track of everything, let alone lend it out effectively to the patients who could use the various devices and tools. This client and I worked together to weed through the equipment and as much of it was outdated we were able to recycle many boxes worth of old technology. The rest of it was no longer needed. We were able to donate to patients in need. This left her with room to spare in her storage and with patients supplied with tools that they could use to lead fulfilling lives everyday.

Why Pruning? - Virtually every client I work with has some pruning or editing that needs to happen in their space. Spending time upfront going through your belongings and making sure you keep only what you want, need or use, can help make the rest of the organizing process much easier. In this module we are going to focus on **pruning**. We will look at strategies for how to effectively weed and edit through what you have - whether it is actual physical items, paper or files on your computer.

Why do we have so much stuff? - Let's talk first about why you might have so much stuff. Take a moment and think about how our culture works. We are extremely acquisitive. We are focused on getting more things. And we have no mechanism built into how we operate for us to know when we have enough stuff, let alone when it's time to let go of the things we already have. Usually by the time that people are starting to think about, 'Wow! I've got too much stuff', they might be in a state of complete overwhelm or might be bombarded by things in their space. So don't feel too bad if you have more things that you can actually use. Many people do. In fact most of the clients I work with encounter this very same problem. And I like to blame it on our **culture**. It's just how we work. Unfortunately we have no mechanism for letting us know that there is enough stuff. That is the way we accumulate way more than what we need. So if that is the case for you don't feel bad about it. Know that you are not alone in that.

One of the challenges that I often come across when working with clients and helping them weed through their things is the '**but I'll need it someday**' syndrome. In truth, every single thing that we have, whether it is something that was purchased a long time ago or something that we just bought today, could be useful to someone, someday, under the right circumstances. The question to ask yourself is not might it be useful someday, but is it useful today or in the foreseeable future to me and in the work that I envision myself doing. If you can't see yourself realistically using it or needing it in the foreseeable future chances are that it is something that you can let go of.

Often times what happens when I work with clients is that we get rid of things And lo and behold! There is something that they got rid of that they could still use or need. That happens to everyone. We are not looking to get rid of every possible thing that you could use or need but only the things that you aren't likely to need in the near future. So expect that one of the things that you are going to get rid of you will probably need and be OK with that and move on.



Questions to ask yourself while decluttering - To help you get rid of things that you no longer want, need or use, it is helpful to have a list of questions to ask yourself as you are going through your things. Other wise you might get stuck while you are in the middle of the organizing process. And instead of continuing to let go of things you might simply stop. So it is helpful to have a list of questions as I mentioned. Some of the questions to ask yourself are: When was the last time that I actually used this thing? Can I even remember using it in the first place? If you can't remember when you last used something and you can't think of when you might need it next, it is probably something that you can let go of.

Try this: Can you identify a specific time - and I mean really specific time or circumstance - within the next six months when you might actually need something. If you can't think of a specific instance, - not, 'I might need this', but, 'I will definitely need this when I go to that meeting with that client next month', then it is probably something you can get rid of. Of course again everything might be useful someday. We are looking for specific 'somedays' in this case.

Is the thing that you are looking at in need of repair. Is it broken? Can it be fixed and if so is it worth fixing? That means if you had to pay to get it fixed, would it cost more in terms of your time and your money than it would be to simply replace it? Is it worth it? If it is not, look at donating it or recycling it. Is the thing you are looking at outmoded or out of date or is it simply not up with the times in terms of technology? Is it relevant to you? If you can't answer affirmatively to any of these things then it is time to let go of that item.

Now here is a good one. ***Do I actually have space to keep this thing?*** If you have run out of storage space and if you are waffling about whether to keep something, it is time to really take a cold hard eye at your belongings and look at whether you actually have the space to store your stuff. If you can't think of a specific home for where this thing should go, then it is something that you might want to consider letting go of.

Another good question. ***What is the absolute worst thing that could happen if you were to get rid of this item?*** Would the world cave in? Probably not! Would you be inconvenienced? Maybe! Look at the level of inconvenience that it might cost you. If it is something like a supply, for instance, if you were to get rid of it, would it be easy enough for you to get it again? Is it a document that is simply irreplaceable? If that is the case you might want to hold on to it. But think of the worst case scenario if you were to get rid of something. That might help make the decision a little bit easier.

Another question to ask yourself. ***Did you ask for this thing in the first place?*** This often happens with gifts or things that people have brought into your workspace that you did not necessarily ask for. If this is something that you did not want or purchase yourself don't feel too bad about letting it go. Chances are the person who is giving it to you will never know that you've let go of it and in the letting go of it you might pass it along to someone else who might make better use of it.

Another question to ask yourself - ***Does this thing that you are looking at fit in with how you***



envision your space, your work and your life, right now, today? If it does not fit, whether it is aesthetically, functionally - in terms of the amount of space it takes up or some other factor, consider letting it go.

This is a distillation of all the questions: Do I need this item? Do I use it? Do I love it or even like it? If you can't stand it; if you hate it, you don't need it and you don't want it, why is it there in the first place? So ask yourself these questions as you are going through your belongings, guaranteed they will help you make decisions on the things that are in front of you.

Master Edit - Now that you have these questions in hand it is time to do what I like to call the **Master Edit**. Essentially this is where you go through everything that is in your space and take a cold hard eye to everything that is there and make sure that every single thing still makes sense for you. This is something that most people don't take the time to do. But I think that it is absolutely essential to do this as you are beginning the organizing process. Why? Because you want to make sure that everything in your space - whether it is a physical item or information or things that are on your schedule, still make sense for you. And unless you take the time to look at what is there, you will never know whether everything makes sense.

So take some time and on your action plan you might want to note that one of the first things that you might think about doing is a Master Edit of every space. Now you don't have to do this all at once. You can break it down into chunks. You might do a Master Edit starting with one shelf on a book shelf or one drawer in your desk drawer. We are not necessarily looking at organizing the items at this point. Instead we are just looking to make sure that everything you keep is something that you actually want or need or use. Once you have done that then we can move on to the next steps which are actually organizing the space itself.

Master Container - As you are going through your things and you are doing your pruning and your editing, one of the things that might be helpful to think about as well is what I call the **Master Container**. The Master Container is what holds all of your stuff. One of your Master Containers is your **office**. Your office holds everything that is there.

Another Master Container could be your **file cabinet or your shelving unit or a chest of drawers** that is in your office. So these larger containers, these larger holders can help define the amount of things that you are allowed to keep in your space. If what you are storing or considering storing can't fit in your Master Container or in one of your larger containers, then it probably doesn't belong. One of the guidelines that you are looking at as you are considering going through your things and what to keep and what not is what are the Master Containers in my space and do the things that I am considering keeping or letting go of fit within the Master Container?

I am looking around my space right now. One of my Master Containers is a shelving unit. If I have more books than can fit on the shelving unit then I know I need to weed through the books until there is enough space left so that they can all fit.

Another master container is a **drawer unit**. If I have more supplies that can fit in the drawer then



I need to weed through some of the supplies until they all fit within that container. So that is one of the tools that you can use, in addition to your decision tree to help you decide what to keep and what to let go of.

How and Where to discard your belongings - As you are going through your belongings and deciding what to keep and what to let go of, consider the environment as you are going to discard your items. There are many reasons why you want to do this besides just feeling good. Many of the things that you are going to be discarding can likely be used by someone else. So start making some piles of things or bags of things to take away from your space. One of them might be of things that are perfectly usable by someone else, just not necessarily by you. You might take these things to your local goodwill or your favourite local charity or library or school. Places like these are always happy to accept things like office supplies or books or other office related tools like old computers. For instance, if you are going to be getting rid of some old computer equipment, you might want to consider donating that to your local technical college or even to good will. These places often dismantle computers and help use them in job training for new people. In your workbook there is a list of resources that you can use when you are donating your items.

Another helpful thing to do when you are donating is to have a donation party with some of your friends or colleagues or co-workers. Each of you can bring the things that you no longer want, need or use and then you can swap with each other. Because they may have something that you'd like and you might have something that they'd like or be able to use in their space.

If something is truly just junk and no one could want it or use it, think about how you can most easily recycle it. Most cities or towns now have electronics recycling where you can take things like broken computers or cables or cords or old pieces of equipment that are no longer usable. You can also find eco friendly haulers if you have lots of things that you are getting rid of and you simply don't want to see them go into the landfill.

Regardless of how you choose to get rid of your things, always look for ways that you can recycle or reuse them or give them to someone else who can recycle or reuse them for you. We don't want to add things to the landfill simply because we are done with them. Instead look for responsible ways that you can let go of your things. You will feel better about it; you may even get a tax deduction in the process and some one else could actually use your items.

Emotions - Something that usually surprises people when I am working with them to help them begin the pruning and editing process of their organizing work, is how emotionally tiring the organizing process can be. As you are going through your belongings you might find that your emotions might run pretty high. As you are going through a project for instance you might find pieces of that, that are unfinished or a client piece of work that you just did not complete or an idea or an opportunity that you wanted to follow up on and that you never got around to. You may find cheques that are uncashed or bills that have been unpaid and may now incur late fees. Things get buried when we are disorganized.

As we begin the pruning process we are often uncovering things, kind of like an archaeological



dig. Some of those things will bring happy feelings - look at this great piece of work that I did for a client; look at this note from a client that says what a great job I did for them. And other things may have less good feelings. Let's say, again, unfinished projects, bills that are unpaid etc. And virtually every time I have worked with a client we come across things that trigger emotions for people. And that is a natural byproduct of the organizing process.

So as you are going through your things and you are starting to prune them and weed through them and take out the things that you no longer want, need or use, expect that you will have some sort of emotional reaction at some point during the process. Even the most hard business types I have worked with come across something in their space that triggers some feeling for them. So know that it is going to come.

Also be prepared for it by having some sort of support whether it is a friend, colleague, a professional organizer or maybe even just an organizing buddy that you can talk to if and when such a thing happens. Because what you don't want to have happen is this: you are going through your stuff. You come across something that triggers some sort of emotional reaction and you stop the organizing process at that point. Don't let that stymie the progress that you are going to make. Instead have a strategy for how you are going to deal with it when it comes up. Know that it will come up and have a strategy for dealing with it when it does.

Paper pruning - Let's talk for a minute about one of the specific types of things that I will be asking you to weed through as you are entering your pruning process. Let's talk about paper. Everyone has got it. Most of us have too much of it. But all of us need to do something with it. At this point, I am not asking you to organize your paper. I am asking you simply to go through it and look for what you actually need. Most people keep way more paper than they can ever possibly need or use. One of the reasons why is because it is confusing and hard to know which pieces of paper you are supposed to keep and which ones are OK to let go of. So what I find is that most people err on the side of caution. Instead of getting rid of things they keep mostly everything.

There are a few folks out there who rather than keep everything, get rid of everything instead. And that is not really the right thing to do either. What you want to do is to make sure that you are keeping the things that you actually need. The way to do that is by having a set of retention guidelines. Most retention guidelines are dictated by the IRS. The IRS actually has a handy form on their website which lists some suggestive retention guidelines for common types of documents that can be found in virtually any home or business. I have included a link to that document in your workbook.

Now that is just as it says - a guideline. This isn't the final word on what you should or should not keep. Instead, what I suggest doing is asking your Tax Preparer or your CPA what the specific retention guidelines for your own individual business and life situation are. The reason why you want to ask these folks how and what you should keep and when you should get rid of things is because they are, hopefully, intimately familiar with your financial and your tax situation. And since many records are connected to your taxes, it is important to go to the source where the person is preparing those tax or financial information pieces, so that they can



give you the correct answer on what to keep and for how long.

You will hear a variety of guidelines out there. Some tax preparers say keep 3 years worth of supporting documents for your taxes, while others will tell you to keep 10. This variation is why it is so important that you consult with the person who is preparing your taxes - not the person who prepares your parent's taxes or your friend's taxes or your sister's or your brother's or your co-worker's taxes. Your taxes - because only they completely understand your tax and financial situation.

Now once you have received a set of retention guidelines from your tax preparer or your CPA or your accountant, then you can take that retention schedule back to your own file cabinet or your box of papers or stack of papers that might be on your desk and start weeding through what is there.

In addition to the types of documents that you will need to keep for your taxes and your financial records, there is a whole host of other types of documents that you might want to hold on to or let go of depending on the case, for your own personal and/or business record keeping. Just kind of as an FYI. So that you can have them for your own records and knowledge and reference. These are what I call your archives. We will talk more in detail about these when we get into the paper management section of this programme. But for now, look through your documents and look and see what you have actually been using or accessing. If you haven't seen a piece of paper in years and it is starting to yellow, that might be a good sign that it is time to let go of it.

Like wise might also be true of you are looking at a document and the information contained in it can be easily found online or can be recalled from a colleague or a co-worker - these are signs that you can actually get the document again really easily and it may not be worth even having it in your paperwork or in your files. Also if a document is outdated the information contained in it is no longer relevant. That might be a good one to toss and recycle as well.

To help you get an idea of the types of documents that you might want to weed through, in your workbook there is a spot for you to fill in the different types of documents that you have along with some suggestive retention guidelines that you can fill out for your own specific personal or business situation. Again these are only guidelines. You must consult with your tax preparer, CPA or accountant to get the guidelines that are specific for your own personal situation. If you don't, you are going to be wondering did I do the right thing; did I get rid of the right documents or should I have kept them. So it is better to not wonder and instead make a quick phone call or send an email to the person who is helping you with your finances and get the correct answer so that you will know that you are doing the right thing.

Now as you are weeding through your documents and you are getting rid of certain things make sure to dispose off your papers securely. That means either shred them onsite for things that have maybe your account information or confidential client documents or maybe they have even just your name and address. Certain people like to shred things that have their name and address on them. If that is the case for you, make sure that you have a shredder onsite or



bundle up all the things that you are going to have shredded and take them to an offsite shredding facility. Most cities and towns have at least one of these facilities at this point. Often they can be found at the local garbage dump where they are happy to shred things and then recycle them for you. Of course there maybe a fee associated with doing this. But plan ahead and know that you don't just want to just toss your documents especially those that contain sensitive information, into the recycle bin. It is just not secure anymore to do that.

For those things that don't require secure disposal make sure to either recycle them yourself by putting them in your recycle bin or take them to your local recycling centre for disposal.

Computer Pruning - In addition to weeding through your physical belongings and your papers and other documents that might be around your desk or your office, it is a good idea to also prune the files that are on your computer or computers if you have more than one. Computer files even though they don't take up physical space, they can quickly eat up your hard drive or any other storage media that you are currently using.

So it is really key to clear things off on your computer so that not only do you have space for the new things that you are going to create but more space on your computer can help your computer actually run more efficiently and more quickly. So it is a good idea from time to time to weed through the files that are there and make sure just like with your papers and your belongings, that you are keeping things that you want, need or use.

On your computer there are actually several ways to do this that might be more expedient than doing it with paper or with physical things. The built in search tools on most computers can help you look for files that are over a certain size, say 5 megabytes. You can look for all the files that have a large size and then decide which ones you want to keep and which ones you want to get rid of. Often times we keep multiple copies of versions of documents on the computer. If you are only using the most current version and have no need for the older versions and have no need to archive them, it might be worth weeding through those and getting rid of those as well.

Another thing that people do frequently is keep multiple copies of photos. If you are using your computer to store photos, you might want to take a look at those and see if any of those can be deleted. People frequently keep all of the photos that they have downloaded from their cameras or from the internet even if the photos aren't particularly good or if they are unflattering. I say, why keep those at all? Only keep the photos that you like. There is no reason to keep ones that aren't good or that don't interest you.

There are tools for both Macintosh and Windows that can help you look for duplicate files. Now this is really handy because as I mentioned it is easy to keep multiple versions of things on your computer. You might have exactly the same file in several different places. That is just wasted space. So download one of the tools that helps you find duplicates and that can instantly save you many gigabytes even potentially many, many more than that of file storage space.

I know when I recently did this on my computer I saved, I think, 6 or 7 gigabytes worth of space - not megabytes, gigabytes. Because there had been multiple versions of backups; there were



old files that I had forgotten were there. And this helped me clear them off in a matter of moments. These tools are listed in your workbook.

Also you might just want to think about if there are things on your computer that you have noticed that are there and are taking up space that you aren't using, maybe you want to archive those onto a DVD or other more permanent media for storage elsewhere. If you are not using something and it is simply taking up space, it may not be the type of thing that you want to live on your actual computer. You might just want to have it so that you can access it later. And if that is the case, look at moving it to an external storage media like an external hard drive or CD or DVD or backup flash drive for use later.

Going through all of these steps will help you free up a lot of space on your computer which as I mentioned can help it run more smoothly, more efficiently and make it easier when we actually work on organizing your computers files.

Weeding through and editing your belongings in your office is one of the first steps to help you get more organized. It may not be the most fun part of getting organized but it is absolutely essential. Because we don't want to waste your time spending time organizing things that you don't actually want, need or use.

So your next steps for pruning will be:

- Figuring out when you can start your Master Edit. Identify a few times in your schedule when you can sit down for even just 15 minutes and just start working on a particular corner or section of your space.
- Identify the key areas that you want to spend time pruning or weeding through. Choose which areas will get you the most paying for your time buck in terms of weeding through your space.
- Identify your Master Containers whether it is your overall office or specific storage unit within your space to help give you some guidelines for how much to hold on to.
- Choose which space in your office you are going to start, whether it is a book shelf or a corner of your desk. Set some retention guidelines particularly for your documents. They will help you make decisions as you go through your things.
- Determine what your disposal methodologies will be. When you are done using something are you going to recycle it, shred it or pass it along to someone else who could potentially use it?
- And again schedule time to work on this piece of the organizing process. If you don't it is highly unlikely that you will make progress. And again, since this is such an important piece of the organizing process, setting aside time to do it is really important.



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Be aware that pruning may take some time, especially if you have a large backlog of things that have been collecting clutter for years. You are not going to get through them in 5 or 10 minutes. Be patient with your self and patient with the process. You will get there.



SPACE

Client Success Story - Welcome to module 3 - Space. A client of mine wanted to start her own business. But she did not think there was any space in her home for her to work from. When we toured her space, we found a basically unused closet - you know the type of space that you kind of dump things into. This had been one of those that had previously been used as a dumping ground for all sorts of miscellaneous stuff. With some changes - some additional lighting, a spacious desk and the right containers for the space - we were able to transform her closet into a workspace for her to start her business from.

Why - How our physical space looks and feels is key to how we feel about ourselves, our work and how we present ourselves to the world. When we are organized in our workspace, we could be more productive, do better work and just plain feel better and more in control.

Also when our space is uncluttered it is definitely more impressive to people who come in and visit it than if it were a mess. An organized desk or office just looks more professional. And as we all know, first impressions count. Especially in the world of business, where money is going to change hands.

What - This part of the system is all about your space - how to deal with clutter, how to set up a workspace and how to store your stuff. We'll be looking at how to choose the right workspace, how to store your things and how to make it all look good in the process.

How - One thing that's essential to both getting and staying organized in your office is **choosing the right workspace**. Now when you worked for someone else, they probably told you where you had to show up for work. They sent you the address, you showed up on time, you got paid and that was the end of it. But when you work for yourself, you have to decide all of that stuff on your own.

So one of the first things you need to decide is where are you physically going to work from. Now typically you have two choices. Either you work from a home office - that is inside of your home, as the name suggests or a separate space - maybe a retail storefront or a commercial kitchen. Depending on which option is right for you, you will have a different set of challenges that you need to work through. But first lets talk about what some of the pros and cons of each of those two options are.

Pros to working from home - If you work from a home office, one of the nice things is that you have no separation between your work life and your home life. So, if you need to run a load of laundry when you are working, you can do that in the background as you are getting other tasks done.

Also there's no other additional cost associated with a home office. You're probably already paying either your rent or your mortgage for the space. So there's no additional over head that you need to incur.



Also your commute time might be zero - might just be down the hall or if you are in a studio apartment, you might just rotate your chair and there you are in your office.

Cons to working from home - So there's a number of pros to working from home. Some of the cons are: you have no boundary between your work life and your home life. So while it can be nice to do the laundry during the day, some times those home related tasks that don't generate you any revenue, can quickly become way more enticing when you're at home rather than when you're at a separate workspace.

I have clients that I work with who work from home and they told me that they never felt so inclined to do the vacuuming until they started working from home. All of a sudden the vacuums just call out to them and say, "Work on me now. Clean the house now", when in reality they need to be working on things that are essential for their business.

So making sure that you have some clear boundaries when you work from home is really key. And we'll talk more about that in a moment.

Pros of working from a separate office - Now working from a separate office has some really clear benefits as well. You have a very clear line between your work life and your home life. When you go into an office space there aren't the same temptations around you to distract you that there are when you work from home. Generally there's no TV, there's no kitchen, there's no laundry, none of those things that can distract you from focusing on your revenue generating or your marketing tasks.

When you work from a separate workspace also, it seems more professional. You may feel like, "Wow! I'm going to work." You might be able to have clients or vendors come and meet with you at a separate space. And there's that completely different feeling associated with it, than if you were to have them meet you in your home.

Cons of working in a separate office - Now the challenges with a separate workspace are primarily that you need to pay for it. And if you are a home based business and you have been used to that for a while, incurring the additional costs associated with renting a space can be challenging, especially if you're just starting out.

And finding the right space can be a challenge as well. Finding the right workspace, especially if you're paying a long term lease, which is often the case when you're renting a commercial space, can be quite difficult.

So, you have to weigh the pros and cons of working from home versus working from a separate workspace. Now if you're just starting out and you don't even have the funds for a new desk, lets say, and you were going to work from home at least at the initial part of your business, there are still ways that you can make an effective workspace for yourself with zero budget.

Creating boundaries - One of the things that I see often when I work with new clients that work from home is they'll tell me, "I work at the kitchen table one day and then sometimes I'll go to



the local coffee house and then maybe on a Friday I'll go to the library." While this type of diversity might seem like its great for boosting your creativity, what it does in essence is it really derails your productivity because there's no consistency there. And when we're talking about being productive and being organized and being effective, we want to create as much consistency in your actual workspace as possible.

So one of the things to look for is where in your home can you create a workspace that you can work from, consistently, everyday. So for instance, you might choose a kitchen counter, or part of your dining room table or maybe a corner nook or a coffee table. Any of those can be fine and they can all actually be effective workspaces, they have been in the past for some of my clients. But the key here is to work at the same space each time. Don't work at the coffee table one day, Starbucks the next day and then the kitchen counter the day after that. That creates that really disjointed feeling. So instead choose a workspace where you can work comfortably or where you can have all your supplies around and work there consistently until you have the resources to find a better option, maybe it's a different desk or a different corner of your home or maybe you have a home office that you currently are using as a bedroom and you decide that you will change that later.

So look for ways that you can create that consistency in your own space that will help you be a lot more productive.

Choose your workspace and hours of work - Now I talked initially about the boundaries between your work life and your home life. And one of those ways to create that boundaries which is so important is to choose your workspace. So first you want to choose, "Am I working from home?" or "Am I working from a separate space?". If I am working from home will it be a separate room? Will it be a corner that I carve out? Will it be the coffee table that I use between 9 and 5? Whatever it is take a few minutes and note that down in your workbook. Also, note in there what you would like your working hours to be. The days per week that you would like to work and the hours per day.

Create container for work life - What we're starting to do here is creating your container for your work life. Both the physical container and the time container. When we talk about time management later we'll look at some of those options about how to create those boundaries. But for now start filling out your workbook with your ideas for how you can separate your home life from your work life. And what cues you can give yourself, whether it's a physical location or changing an outfit that lets you know that now is the time to start working and stop being at home.

Decluttering the workspace - Now any workspace is likely to have some stuff in it and I'll bet if you are listening to this system, that you may already have a workspace and it may even have some clutter in it. If you're like any of my clients, you probably have more things than you know what to do with. And lets talk about some ways to manage those.

Starting a de-cluttering project is often challenging for people. It can seem really overwhelming, maybe they're not quite sure where to start and they're not really sure how to continue once



they have started. One thing to keep in mind as you're getting organized is that sometimes things look a little bit worse before they get better because you often are pulling things out of your space to look at them and make decisions on them and that's just part of the process. So expect that as you move forward.

Techniques to declutter the work space - Lets talk about some strategies that you can use if you're looking to de-clutter your workspace. First how to start. There's a few different techniques that I like to use with clients when we are talking about where to start in their de-cluttering process.

'Drives-me-crazy' method - One of the easiest ways is what I call the 'drives-me-crazy' method. Pick a spot in your office where there is a piece of clutter or a section that is just driving you up the wall. That is a great place to start because that is where you will feel some immediate satisfaction by getting it de-cluttered. So for instance, if there are piles and piles of stuff on your desk, that might be a good place to start, if it is driving you crazy. But if that isn't driving you crazy but the things that are in your storage closet are, start with your storage closet. Working on those things first will make you feel a lot better about the rest of the progress that you are about to make

Newest clutter method - Another strategy on how to start de-cluttering is what I call the newest clutter method. So if your office is a little bit cluttered and you've noticed that a pile of things has started collecting near your book case and it is pretty recent, you might want to start attacking that pile first. Because that is what is newest in your space. And taking care of what's new can make it easier to help you get to what's a little bit older or more challenging.

Also when you work on things that are newer, they are probably a little bit fresher in your mind, so the decision making process on what to keep, what to store and what to let go off might be made a little bit easier.

Rotation method - Finally another method that I like is what I call the rotation method. It is if you really can't decide where to start in your office, you pick 'a' spot, any spot, you start there and you de-clutter it and then you rotate clockwise in your space until you finish de-cluttering everything. This is a less than scientific method, let's say. But it is effective because it lets you methodically attack each and every spot in your space.

So, whatever method you choose, know that there are different ways that you can start getting organized. Once you have chosen a space, then you can start breaking the actual project of getting organized, down.

One of the things that you can look for and you can put this in your action plan is lets say that you have noticed one of your book case areas is really cluttered. You might note down 'Lets de-clutter the book case' and you would start with shelf 1, shelf 2, shelf 3 and shelf 4. And you would take it step by step. You would not attack the entire office or the entire book case all at once. You would break it down into really small pieces because those small pieces are much more manageable. You can much more easily check off one shelf as having being de-cluttered



than the entire bookcase or the entire desk or the entire office.

One thing that I note when I see clients, especially for the first time is they often tell me that they have tried to get organized on their own many times. And that they come into their office on the weekend and they try to organize the whole thing. It is simply too hard to do that in one fell swoop.

Instead take this strategy of breaking things down into much smaller pieces. So, for instance, if you are using the rotation method and you walk into your space and you are looking through things in a clockwise manner, you might notice that your desk is the first thing you see. So you decide to start there. On your desk there are piles of paper, there are books, there are lots of cables coming from your computer, there are things under the desk. Don't try to do everything all once. Note each one of those different pieces of clutter in your action plan and then attack each one as a separate small project. That way you are ensured that you will actually complete each one without creating a giant mess or getting more disorganized in the process.

So choose a method of how to start whether it is the drives-me-crazy method, the rotation method or the newest clutter method and then within each of those sections that you decide to start with, break the de-cluttering project down into smaller components. It will be much more effective for you to do that.

Once you've chosen a place to start in your office, then you can start the process of actually de-cluttering or going through your belongings and pruning them to make sure that you are keeping what you actually want, need or use. In the previous section - pruning - we went through a detailed list of questions that you can ask yourself to help you make the decisions that you need to make in order to go through your things most effectively.

You may in doing this process, find out those things that you want to get rid of but you are not quite yet ready to let go of. And that is OK. In your notebook or workbook for this process, write down what those things are. Then make a note on your calendar to revisit your notebook in 6 months time. At that point the decisions on those items might be a little bit easier especially if you haven't used them in the time in between. Sometimes putting things in a sort of purgatory state, lets us make decisions on them a little bit easier down the line, especially because we have already decided that we are not yet sure about them and they are kind of iffy.

So as you are beginning this de-cluttering process, know that you have permission to keep some of the things that you are not sure about. But encourage yourself and I encourage you to try to weed through as much as you can. It is not that we want to get rid of things willy-nilly. It is more so that we want to create as much space as possible so that you can have the clean, uncluttered workspace that you would like to have. So try to be a little bit tougher with yourself than you have been in the past when it comes to letting go of things. Often times that will make it a little bit easier to get rid of more than you have in the past.

Again using your workbook, use the decision tree to help you make those decisions so that you can go through your stuff in a systematic manner.



So you have carefully pruned the objects in your office. You are now left with all the things that you have decided that you want to keep. Great! Step 1 - check. Now you need to figure out what you are going to do with all of those things, how are you going to effectively store them and organize them so that you can use them when you need them.

Grouping - The first step is to take stock of what you currently have. It is a two step process. First you want to group all of the things you are left with, all the things that you decided to keep into categories. You want to put the like items together. So for instance, you might want to keep all of your books together. If you have a set of binders you might want to group those; all of your papers; all of your office supplies. Group those into categories.

Measuring - Once those are grouped together then it is easy to determine just how much space you'll need to store all of those things. And the way to do this is: once you have your items in groups, take a tape measure and determine exactly how much square footage they need in order to be stored effectively on a shelf or in a drawer or in a cabinet. What most people do when they purchase storage or when they try to put things away is they get a storage unit or a bookcase or a shelving unit and they hope that all their stuff will fit or they are eyeballing and guess that things will fit. And typically they don't. Either there is too much space left over or more likely there is not enough space to store all of their stuff. So they are left with more homeless stuff and it just becomes clutter again. This way if you measure all your stuff you will know exactly how much storage space you will need. And that will help you decide whether you still have too many things or whether you need to purchase a larger storage unit.

Once you have determined exactly how much stuff you need to store, then you can make informed decisions about what storage unit you need to purchase. Again if you are on a small budget you can find alternate ways to store your things. You could go on a site like freecycle or craigslist and look for low cost or no cost things that people might be giving away that could meet your needs until you have the funds to purchase the ones that will be exactly right for you. But the first step in doing all of that is grouping your items together and then measuring them to determine just how much space you will need.

Choosing a storage unit - Once you have decided exactly how much stuff you need to store then it is time to look at what storage unit makes sense. Of course there is a wide variety of storage units available from book cases to free standing closets to drawers and desks and everything in between. And the truth is any of these can make effective storage solutions for you

It is really based on what you need to store - what the actual things are and how you plan on accessing them. So for instance, if you are the type of person that if once things are behind closed doors they don't exist for you anymore, choose storage units that don't include things like drawers or doors. You might want to choose open shelves so that you can see your belongings. If you have a lot of things to store you might want to look for storage cabinets or book cases that are taller or deeper so that they can more effectively fit your things.

But whatever you need to store make sure you plan it out in advance so that you can purchase a unit that will actually fit. Now here is a tip. Most people choose either storage that is too big or



too little. What you want to do is not choose a storage unit that is just right. The reason why is everyone gets more stuff. No matter how disciplined you are about bringing things into your home or your office, chances are you are going to bring more things in over time. So you want to give yourself room to grow. I would suggest adding about 20% of extra space into your storage system if you are purchasing a new cabinet or shelf or drawer unit. This will give you some space to grow so that things won't be jam-packed right away.

So once you determine just how much space you need to store your stuff, then it is time to go out and look for a new storage unit. And remember add 20% so that you can future proof your storage.

Storage Map - Once you have determined what stuff you are going to store and how much space you need to store it and then have purchased a storage unit for everything to go in then it is almost time to put everything away - almost but not quite. I suggest doing one thing before you put all your stuff away. And what that thing is, is storage map. Essentially this is a diagram of what is going to live where inside your storage system. This serves a couple of purposes:

1. It makes it so you don't have to do what I call the 'stuff shuffle'. Essentially what happens is you have all your stuff, you have your new storage unit. And you just put things away. And you notice that as you are putting things away there is not quite enough space on one shelf for all the stuff to fit. So that goes on a different shelf. And then you put some other stuff in between. And before you know it everything is disorganized again. We don't want that to happen. A storage map can help prevent that.
2. The second reason to create a storage map is for reference. So that as your business grows you have a document that says what lives where in your storage system so that as people join your team you don't have to explain to them where everything is kept. You can simply hand them a document and let them find where things are, saving you time and making it easier for them to find what they need.

So those are a couple of reasons to create a storage map. Essentially how to do this is to create a simple sketch of the shelves or the drawers in your storage system whether that is in your book case or in your file cabinet or in your storage closet. And then on each shelf that is in the drawing or each drawer write down what you are going to store inside of each space. You will know exactly what you need to store because you have already measured everything. For instance, if you know that you have 3 feet of books that you need to store and your shelving unit is 36" wide, you would probably want to put your books on two separate shelves so that you have room for them to grow. And you do that for each of the items that you are actually trying to put away.

So before you actually take your stuff and put it on the shelves or in the drawers you will take a few minutes, draw a sketch of your space and you can do this in your workbook there is space already set aside to do that. And then you would, in the diagram itself, write down what lives where. It doesn't have to be fancy, you don't have to make little pictures of things although you can if that is helpful for you. But essentially this is just a list of what is on each shelf or in each



drawer. So at a glance you can look at the document and see what you need to put away. And then when you are trying to retrieve something later you can use the document for that as well.

Now as your storage changes as you get rid of things and put new things in make sure to update your storage map periodically to reflect the new things that are there and the old things that have left. That way this document will continue to function for you as time goes on.

Prime real estate vs. low market real estate - Another factor to consider as you are putting your things away into your storage systems whether where you are putting them is prime real estate or low market real estate. What I mean by this is there are certain things that you want to keep close by or visible. That is prime real estate. And you don't want those to be taken up with things that you don't use very often. Instead, you want those to be your most valuable, most frequently used, most needed things.

The things that you don't use very often can go further away from you or out of sight and that is more like low market real estate.

So the things that you want to consider when you are choosing your prime real estate space is whether it is close by; is it within arm's reach of you; is it at eye level; can you see it easily; can you grab it without having to get up from your desk or chair or move very far? Those are the things that you want to keep really close to you - the things you use all the time.

Alternatively if there are things that you don't use very often you are going to want to put them not at eye level, either higher up or further down below. You might want to keep them behind closed doors or further away from you. Because these are the things that you are not accessing or using as often. So having them within arm's reach is not as important.

Think about the things that you use all the time. List those in your workbook and put those in your prime real estate whether that is right inside of your desk drawers or on your desk or right behind your desk but close by to you. And then list the things that are not prime real estate and put those a little bit further away from you. So that you don't have them in your way when you are trying to get to the things that you need all the time.

So again as you are considering where to put your stuff, think about prime real estate and low market real estate and think about how your stuff can fit into those categories most effectively so that you can use the things that you need when you need them and put the things further away that you don't.

Aesthetics - As I mentioned earlier how things look is really important. It impacts how we feel about our space and how much we enjoy how we are doing the work that we are doing. Choosing the right furniture, the right storage systems and the right containers so that they match your own personal style with the aesthetic of your business can be a big factor in helping you stay organized. The reason why is if we like the things that we are using, we are way more likely to use them than if we were trying to put things away into containers or cabinets or storage units that we don't like.



So think about what your own style is, what the aesthetic for your business is, before you go out and buy anything - whether it is containers or storage units or book cases. And make sure those things, those pieces match what you are going for. Especially if you are trying to get all new things, all new furnitures, all new containers. This is really a great opportunity to think about how do you want things to look; how do you want them to feel. And make sure that anything you purchase matches that. Because as you create more consistency in your business, one of the ways to do that is with your visual look and your visual feel.

This can be extended through your branding and that is a whole another topic. But for instance, if your primary colours and your branding are magenta and a dark blue, you might want to choose containers to go on your shelves that are in a similar colour scheme so that you can start extending this aesthetic through out not just the virtual hold on your website or your business card but also your physical space as well. That may or may not be the right choice for you but think about aesthetics as you are designing your new work space especially so that it is comfortable for you to be in because spaces that we like to be in are always more effective for us than ones where we don't feel comfortable or don't find enjoyment and aesthetics play a big part in that.

Containers - One of the things you would likely need to purchase for your space to store your things is containers. In the world of organizing there are many, many different types, different shapes, different colours different styles of containers to serve virtually any purpose you can imagine.

One thing to consider is that your space itself, your office or your home office is a container. So you want to make sure that you don't overstuff your container so that the lid per se does not fit. You want to make sure that there is enough space in the container so that you can easily see and access what is inside. And just like you would want to do this for your largest container which is your space, you want to do the same thing for the individual containers that you will use to store your things.

When do containers make sense? They typically make sense when you have a bunch of like items. So let's say you have a lot of different types of ink cartridges for your printer. Those can be pretty messy when they are out on a shelf or in a drawer. You might want to choose a small container so that you can put those together and easily access them when you need them.

So look for things that are already grouped and that don't quite make sense with other items. Those are great candidates to put into containers. Also if there are a collection of items, maybe business cards, for instance. Instead of having those with a rubber band around them, you might want to get a small container for them, maybe a business card box. That might help you store them more effectively.

Similarly for all small items in your space, maybe the computer cables that you are not using or the extra supplies that currently are sitting on a shelf - each of those might do well in their own container.



So containers can come in a variety of styles as I mentioned. And depending on whether you are going to be displaying them on a shelf or they are going to be living behind closed doors, you might want to choose different kinds of containers for each of those circumstances. For instance, if something is going to be out of sight, you might want to choose a more basic, maybe a clear container for those because the aesthetics aren't that important at that point because no one is going to be seeing them. Conversely if something is going to be on an open shelf where everyone can see it you might want to choose containers that match your aesthetic, the rest of the look of your office. So that they can blend well and you don't have to see all the individual items that are inside.

So as you are looking at your space and you see items that look a little bit cluttered, you might want to think about 'Well! Would a container make sense for this? Would it help me store them more effectively? Would it make them look better? Those are great considerations to keep in mind as you are thinking about getting containers.

Labelling - Once you have everything paired through, weeded down and put away, then you are ready for a final step and this is labelling. It's really key to label especially any containers that are in your system. But also it is sometimes helpful to label the shelves or drawers in your storage area for a couple of reasons: It makes it easier to put things away when it is clearly delineated what goes where. And labeling lets us do that. It puts literally a name and a space together so that it takes all the guess work out. You will know exactly what is supposed to go on a given shelf or in a drawer.

Also again as other people come into your business, as your business grows and you hire employees or staff, when things are labelled it is easy for them to know what goes where. And it makes it easier to enforce the systems that are set up. When things aren't labelled it is easy for things to get messy again because it is so hard to remember what goes inside each container when there is nothing on it that says what goes there. So labelling can help take the brain power out of staying organized. When things are labelled you automatically know what goes in. You don't even have to give it a thought. That is why I encourage you to label virtually everything that has anything on it or in it.

The labels don't have to be bright, white labels with black text on them. They can be discreet. They make clear labels that have black text; they make labels in different colours and different styles. You can use hand written labels if you have fine penmanship. I sadly don't. So my handwriting is now more often a label than not. So whatever the style choice is try to find labels that match your aesthetic, that are legible and that fit for the things that you need to store. And label the containers, shelves, drawers etc in your space accordingly. Believe me this will make your life a lot easier as time goes on. And personally I think every office needs a label maker which can be purchased for around \$10 - \$20 for a basic model. Have labels handy, extra cartridges, have extra batteries handy and you may even want to keep your label maker labels and extra batteries in a container of their own.



Well! We have reached the end of the space module. We've talked about how to choose a great work space, ways to start de-cluttering the space, what to toss and when, how to group and measure your items, choosing the right storage units, setting up your storage, making sure that the right things belong in prime real estate or the low market real estate, making sure that your storage matches your style, using containers and labeling your stuff. Take a few minutes and fill out the action plan that is in your workbook so that you can know what you need to do next.



PAPER

Introduction - We all have it and only a few of us were ever taught how to deal with it. What is it? It is paper. It is everywhere. All the time I hear clients say that they feel like they are absolutely buried under paper. It is so easy to feel like things are out of control when you can't put your hands on an important document when you need it or when your desk, chair or floor is covered with piles. This module is dedicated to sharing with you some easy strategies for dealing with paper. We'll talk about how to address the various types of paper that come across our desks and what to do with it once it is there.

Client success story - If you are wondering about scanning, we will be talking about that in the next module Technology. I have almost all of my clients deal with paper especially since almost all of us have it. But some have bigger challenges than others. In addition to being the CEO of her own family, one client has to manage paperwork for several businesses that her family owns. There are tons of documents, contracts, bank statements - just dozens of them. Working together we created a system that makes it easy for her and the people connected to her business to find what they need when they need it. And so that it is easy to put the documents away when they are done using them. Sounds impossible? It is not!

Statistics on amount of paper - I am going to share with you how you can create a system that will work just as well for you. But first some background information. According to a recent survey by IDC 95% of all information in business is still processed in paper form. The average worker prints about 45 sheets a day in the typical business office. That number seems like a lot to me, I'd guess, probably a little bit less for each of us. But even if you are printing just 5 sheets a day, over the course of one week that is 25 new pieces of paper that you need to deal with. And of course that does not account for all the things that you collect while you are out in the world from clients or vendors or from classes or seminars that you might attend.

So the paperless office which was promised to us just did not happen. There are technologies that can help us to reduce the amount of paper that we have and that we have to process. But regardless of how much we do it there is still paper that we have to work with. So don't expect to achieve a paper free life. It just can't happen, at least not yet. Maybe in the future but not right now. Instead shoot for less paper - paper less, not paper free. That is an achievable goal. Maybe you want to reduce the amount of paper you are keeping by 50%. That is achievable. But reducing it a 100% - not possible. And it would be way to difficult to make that happen. So instead of shooting for zero paper, shoot for a realistic target of reducing the paper that you currently have and that you have to process.

Lifecycle of Paper - The key to dealing with paper effectively before you can even create a system to manage it is to understand that paper has a lifecycle of its own. Of course it can feel like paper takes on a life of its own when it starts to gather and sit in piles on your desk or on our floors, but the truth is there are a series of stages that every piece of paper goes through from the time when it comes into your office to the time when it leaves. And understanding those steps is essential to managing paper effectively.



The stages of the life of paper are:

1. Paper comes into your space - whether it is from the outside world or something that you generate. New paper that is unprocessed comes into your immediate work space in some form.
2. Then at some point you might sort the paper - maybe you will sort it into due date or categories or action types. But at some point you sit down and you group the papers together in some way that means something to you.
3. Once things are grouped, then they are processed. You take the actions that each piece of paper requires to be completed. - maybe a document needs to be read; another might need to be paid.
4. Then once the documents have been processed, they leave your immediate work space. That means that if something needs to leave and go out in the mail it gets sent out. Or if something is reference or archival it might be put into a file box or drawer. If something needs to be destroyed it might be recycled or shredded.

Those four stages - things coming in, documents being sorted, then processed and then leaving are the four stages on the life cycle of paper.

How to Manage your paper - In order to effectively manage your paper you will need a dedicated space devoted to managing each step in the life cycle of paper. What I recommend is having an **inbox** for all the things that are new. This is where your mail, your papers, your business cards can land until you have time to actually sort them and work on them.

Then you will have a **hot files area**. This is where the sorting and processing step of managing paper happens. This is for all of your paper that you are currently working on. This is where you will keep it while it is active. This is not permanent storage. And this handles the sorting and processing of your paper.

Then you have an **archival area or a cold storage area**. This might be a file cabinet or a file drawer for reference information and other types of documents that are not time sensitive, that you are not currently working on and that you need to hold on to.

Then finally you have an **outbox** for things that are leaving your space like faxes or outgoing mail. Let's look at each of these in a bit more detail.

Inbox - First step is the inbox. In your inbox is the spot where everything goes - all your new papers, all the new documents, all the new things that you have printed and everything that has come in through the mail where all of that goes until you actually have time to sort and process the information.

The purpose of this is multifold. First you always want to separate things that are brand new



from things that are in process. If you've ever had a stack of papers on your desk and you are working on something and then the new mail came in and you put that on top of the stack and then you left for the day and the process continued for a few days where you kept adding to the stack, it is really tough to sort out where your original document was let alone what is new, what's been processed versus what hasn't.

So in order to prevent that from happening we want a dedicated space for all of those things that you haven't yet worked on or looked at. So it is best to have some sort of tray or box or basket somewhere in your work space that is dedicated solely for putting new mail and new unprocessed documents into.

The aesthetics of this can be based on your own personal choices. You might want something that is open like a tray or a box or a basket. Or something that is closed - that has a lid on it like some sort of container. Beware, if you are the type of person that if something has a lid on it or is closed what is inside it is essentially gone, you might not want to choose something like that for your inbox. You want some sort of visual reminder that things are inside of there.

So with this step, with having an inbox, it is important to know that it is completely action free. The only thing you do is drop your new papers in there and then you work on them later. You don't actually take any actions in this step. You don't read the mail; you don't even open it actually; you don't process the papers. All you do is put them in. The actions come up next. The only purpose of this is to collect all your documents so that they are ready and waiting for you when you actually have time to work on them. So it is essential that you create an inbox to manage all of those pieces.

Hot Files area -After all the documents have been collected in your inbox then it is time to manage the sorting and the processing step and take actions on your documents so that they can continue to move along in their lifecycle. What most people are missing when I go into their offices is a dedicated space for managing this step in the process. What I recommend doing is creating an area called the hot files.

This could be a desk top file box or a small section of your file drawer. Its only purpose is to sort and separate all of the documents that you either need to work on or are currently working on so that they don't get mixed in with the other things that you are working on or the things that are brand new.

Paper moves into the hot files from your inbox. And within your hot files there are some separations, there are some categories. And unlike a techlifier (?) which is separated by date, your hot files are organized by action categories. So think about all the actions that that stack of paper on your desk requires. They are not all just TO-DOs. Instead think in more detail. What specifically does each piece of paper need to have done?

Some common action categories are things like bills to pay, mail to read, correspondence, things to discuss for someone else, calendar items, calls to make, things to research online. These are all really common action categories that should have their own separate hanging file



in your hot files. That way as you are sorting through your inbox, you can simply drop each document into the corresponding hot file. Once things are in your hot files, it is easy to grab a folder and take all of the actions at once.

So think about it. In your current stack of papers there might be some calls you need to make; some other actions you need to take like adding things to your calendar or maybe doing some correspondence. When things are in a big jumble like that it is hard to stay on track. It is hard to stay focused. It is definitely hard to get any sort of momentum. But if things are organized into categories based on action in your hot files you can take out the calls folder and make all of the calls at once. You can take out your address book and put things into your address book all at once. So this can actually save you a lot of time because instead of doing a lot of different types of actions at one time you are doing a lot of one type of action at one time. So it streamlines your work flow considerably.

So, documents move from your inbox into your hot files. Once they are in your hot files and sorted into their corresponding action categories, which there are some sample categories in your work book, you of course can add your own as well, once documents are sorted into their action categories, you process the papers until the documents are gone, until there is no more actions that they need other than maybe just to be filed.

Once things have been completely processed then your documents move on to other places but they don't live in your hot files indefinitely. Instead they will move on either to an outbox or an archive or maybe to the recycle bin with a shredder which we will go over in a moment. But it is important to note that things that are permanent do not live in your hot files. They live some place else. Only current things that need actions, that need to have something done to them or with them live in your hot files.

Archival area - For those documents that have moved through your hot files that you still need to hold on to, those will go into a place called the archive. This is for the information that you need to store indefinitely or for a while. This is your infrequently accessed, more permanent storage solution. This is typically a file cabinet, a file drawer or a file box. And the purpose of this space is to store those things that you don't need access to all the time. But that you need to retrieve every so often. So if something is a document that you need to use every single day, you might want to make a special folder for that in your hot files. But typically if you are accessing a document less than once a week or even just once or twice a month you might want to make a place for it in your archives so that it is out of your immediate workspace yet still retrievable when you need it.

Just like your hot files your archive is organized by category. Think about the different types of categories that you might have in your archives. You might have categories for your vendors, your customers or clients, invoices that you've printed or received, financial statements or projections. Each of those groupings would get a category, a folder and maybe some files within the folders for your archive files.

Now, a word about category creations. I know people agonize about what to call their different



folders. And the truth is it is a lot easier than you might think. What typically happens is that someone will look at a document. Let's say it is a profit and loss statement. And they will try to think of what the right thing to call it is. And so when they look at the profit and loss statement they might initially think to call it 'Finances'. But then they think, 'Well maybe finances isn't quite right. Maybe I should call it 'Money'. Or maybe I should call it 'Numbers'. Numbers sounds good. I'll call it 'Numbers.' So they file the document under Numbers. Later when they go back to look for it they didn't remember that they filed it under Numbers and they look and they look and they look in their file cabinet and they just can't find the document. So they print it again.

If that has ever happened to you, you know exactly what I am talking about. That is why it is so important to create category names that make sense for you. The easiest way to do it is whatever the first name that pops into your head is, is what you should call your file structure. The reason why is when you are going back to retrieve your document later, that is the same thing that is going to pop into your head when you are looking for something. So don't over think your filenames.

If when you are looking at a profit and loss statement the first thing that pops into your head is finances, call that folder finances. There is no need to over think it. And there is no need to get it right per se. There is no right. There is only right for you. Especially if you are going to be the only person accessing your files, it does not matter what someone else would call them. All it matters is what you would call them. Because what you call them is how you want to access them or retrieve them later.

If you are working in a team then it is sometimes helpful to get consensus or agreement on what to call files. But in the end it should rest on the shoulders of the person who is going to be using the files the most. Because they are the ones who will be needed to remember the different file names.

There is a reference tool that you can create to remember what is in your file system. It is called a file map and a sample one is provided in your work book. This is essentially a list of folder names or file names that are in your overall paper management system. So that at a glance you can see what the different files are called and what lives where. This can be a helpful document to keep handy not only as you are learning to use your new paper management system but also as other people join your business. You can hand this to them as a reference document so that they can know which files live where.

So again as you are creating folders and files for your archives keep in mind that the only person, generally speaking, if you are in a very small business, that needs to remember what the file names are is you. So create the folder structure based on your needs and how you think.

Outbox - Now there are going to be some papers that you don't need to hold onto and that you just simply need to move out of your space. For those documents it is important to have an outbox. And an outbox is a companion to your inbox. And like the name implies it's sole purpose



is to collect all the things that are on their way out of your space, so that they don't get mixed in with the things that are either brand new or in process. And just like your inbox this can be a tray, a box, a basket, some sort of container that can live on or near your desk or where you process your paper. This makes it easy to grab all of those things that are leaving and take them with you when you are on your way out of the door of your office.

So for instance, let's say you have processed through your hot files and there are some things that need to go in the outgoing mail. Once you are done processing them you could drop them into the outbox and then take them with you when you leave. This makes it easy so that you don't just search your space for those things that are leaving. You never have to go through the piles again if you have an inbox, hot files and an outbox. There will be no more piles because everything will have a home.

Retention guidelines - Probably the most common question that comes up when I help clients organize their paperwork is: For how long should I keep it? I wish there was an easy answer to this question. But as you might expect the reason why this is so hard for people to answer is because the answer varies for each individual and each situation.

There is no one rule for how long to keep things. If you are thinking about keeping documents simply for IRS or tax purposes, there are two things that I would like you to do. First and foremost talk to your tax preparer. They will know for sure based on your tax situation and the rest of your financial picture, how long you need to keep your documents. Some tax preparers will tell you 3 years; some 5 years, others 10 years. Whatever yours says is what you should do.

Now if you are keeping documents specifically for your own reference, that is another story. You might want to think about going through your files every six months or so and removing the things that you no longer want, need or use. But in terms of how long to keep things in general, it really varies based on what the purpose of keeping them is. So for instance, if you are keeping multiple versions of all documents because you are keeping them for historical reasons or for different types of perspectives or just because you want to see what you have done before, there is no one right answer for how long you should keep those things.

One of the ways to determine how long to keep them could be on space available. Do you have room to store these things? If so keeping them for a little bit longer might not be problematic. But if you are running short on space then you might want to be a little bit more ruthless with how long you keep things.

In your workbook there is a document called Recommended Retention Guidelines. Now this is just a sample and you can fill in your own ideas here for about how long to keep your own non tax related documents. Of course your decisions about how long you keep things will vary from what someone else does. And that is OK. As far as IRS guidelines, I have also included links to a couple of different, helpful IRS publications, record keeping for both individuals and for businesses that can help you get an idea - not an answer - but an idea for how long to keep things. Again, I encourage you to talk to your tax preparer because they can give you the



specific information for your own personal or business record keeping needs.

Types of Paper to deal with - Now that you have a strategy for how to deal with paper throughout its life cycle, let's look at some of the different types of paper that you might come into contact with and how to deal with those specifically.

First let's talk about **business cards**. If you are going to networking events; if you are attending classes or seminars; if you are meeting other people, it is likely that you are giving them your business cards and then you are collecting theirs. If you are like most of the people who I work with, you probably take the business cards, maybe you put a rubber band around them and drop them into a drawer or box and typically they are never seen nor heard from again.

This is a waste of time. It is a waste of your time on several levels. First, if you are not taking action on those business cards, it wasn't a helpful endeavour for you to go to those networking events or seminars in the first place. And second, it is waste of time for you later when you have to sort and process through those cards, racking your brain trying to figure out who these different people are.

So it is important to have a strategy for dealing with business cards as soon as you first collect them. When you first return back to your office from a networking event or a seminar where you have collected a bunch of cards, immediately go through the cards and decide which people you'd want to contact again and which ones you wouldn't. For the people who you can't think of a reason why you'd want to contact them again or maybe you just didn't like them, recycle their business cards immediately. For the other folks that you do want to contact again, drop those business cards into your hot files under 'add to contact' list or 'add to address' book. That way when you have time to sort and process your paper, you can take action on all those business cards at once.

So let's say the time has come for you to go through your hot files and work on processing your business cards. Here's what I suggest you do. Transfer the items, the different contact information pieces on the business card into your address book. It does not really matter if your address book is on the computer or if it is something paper based. It just matters that you have something, someplace to keep all of your contact information together.

In addition to transferring the basic contact information like the person's name, their business name, their phone number, their email address etc., it is essential that you copy other important details that will help you remember this person. First note where and when you met them. Was it at a specific networking event? Was it at a seminar? Was it at a trade show? Note where and when you met them because that will help you remember them later.

Also note down some key memory triggers. What did they wear? What did they look like? What was the conversation you had with them about? Did they tell you a funny detail or story that will help to connect with them later? Note that down in your address book.

And finally also note how you can help them or vice versa. Do they provide a valuable service



that you can offer to your clients? Or do you have something that you can offer them or the people that they serve? Under what circumstances might you want to contact them again? All of these bits and pieces of information help you build the relationships that are so important in the world of small business. And the more of this information you have captured in your address book, the more likely it is that you will be able to contact this person and you can make that connection a valuable one by having this information at the ready.

Once you have transferred all this information into your address book then you can either recycle the business card or if you need to keep it for visual reference as a memory jog for yourself, you could keep it in a business card book or on a rolodex or in some sort of file. But don't keep it in a rubber band stashed in a drawer. That just isn't effective for referencing them later.

Another type of paper that you are likely to encounter are **receipts**. Let's say you go out to dine with a client. There is a receipt for that. You might receive some bills in the mail that you pay. Those are invoices or receipts as well that you need to hold onto. All of those things need to be kept track of. Not only for your own record keeping but also for the IRS. In case you ever get audited, the IRS wants to know that whatever you have claimed on your taxes matches the records that you have kept. So having a system for managing your receipts and other financial expenses, write-offs, etc. is essential.

The easiest system that I have found for managing this type of information, if you are keeping the paper versions, is an accordion file. And accordion file can be purchased at any office supply store. The thing to know here is you want to get the accordion file that is labeled 1 through 31 that has a flap, so it can be closed. We are not actually going to use the numbers. Instead we are going to re-label each of the slots for each of your expense categories.

For instance, think about the different types of expenses that you have during the course of a business day. You probably have expenses for meals and entertainment, office supplies, internet access, business phone, cell phone, maybe office rent - all of those different categories would get a slot in the expense accordion. That way as the year goes on you can simply drop those expenses into the corresponding slot in the accordion. When the year is over you can simply add up the expenses within each category and give the totals to your tax preparer. Most tax preparers don't even want to see your receipts. They simply want the totals. So you can actually save yourself time and money because you won't need to do the day long sort of receipts that typically happens if you have been shoving everything into a box or into a bag. Or you won't have to pay your tax preparer to do that for you which is a needless expense. Especially if you have an easy system to keep track of your receipts like this one.

Each year you would create a new accordion file and you would label it with the corresponding year. At the end of the year when you have your taxes prepared you will take the tax return and put it in the front slot of the accordion. Seal up the flap and archive the entire thing. This way if you ever were to be audited, you have not only the tax return but all the supporting documents there ready in case of an audit.



Ways to reduce amount of paper - Generally speaking, it is a good idea to also look at ways that you can reduce the types of paper and the amount of paper in general that is coming in through your door. The less paper that comes in, the less you have to process. Reducing paper is a great strategy for lessening the amount of time that you have to spend processing paper overall.

For instance, you can switch to paper less or recurrent billing or e-bills. You can opt out of receiving certain types of mail. If you are at a seminar, trade show or event don't pick up the different brochures and other types of documentation that are there unless you actually plan on reading it or using it. Many conferences now let you download their conference booklets in PDF or other electronic form. So look for all of the little things that you can do to reduce the amount of paper that is coming across your desk.

Also if you are suffering from junk mail as many of my clients are, in your work book there are a number of resources which can help you reduce or even eliminate the junk mail that is coming into your office. This is one type of mail that you want to immediately get rid of as quickly as you can because it simply sucks your time. So between getting rid of junk mails, switching to some e-bills and not taking as many documents when you are out in the world, you can actually reduce the amount of time that you are spending on paper quite a bit.

Reducing backlog - If you have a backlog of paper that you are trying to get through, let's say many years worth of files that you are trying to weed out or just a ton of paper that you are not sure where to start with, here are some strategies that can help you deal with the giant backlog.

First, you want to work on the paper that is the most recent. Because those are the ones that will typically have the more important, more timely decisions that need to be made. Work through the newest papers going in reverse chronological order. Start with what is newest and then work through what is there and then move onto what is a little bit less new and so on and so forth. And so you are finally working on the stuff that is really old. Usually the stuff that is really old is typically pretty easy to go through. Because it may be outdated, it may no longer be relevant and just generally the decisions that you will need to make on them are easier because at that point you will have already practiced making decisions on your newer paper. So by the time you get to your older paper it will seem like a walk in the park.

Also another strategy for dealing with a backlog of paper is to take it in stages. So let's say you have 10 file boxes that you need to get through. You might choose to work on one file box per week or one section of a file box per week. But define what you want to accomplish in a given time period and then focus on achieving just that. Once you have completed that section don't worry about moving on to the next one as long as you've already scheduled time to work on it. You don't need to over do it especially if you are dealing with a giant backlog. Dealing with it can be pretty tiring because you are making decision after decision after decision. So pace yourself and take the project in stages.

Disposing of paper - For the documents that you are getting rid of, make sure to dispose off them properly. If something has any sort of personal or identifying or confidential information on



it, definitely shred it. It is better to be safe than sorry with this type of information. If you have a lot of documents that need to be shredded, you might want to look in your local city or town for a professional document shredding service. These services allow you to either take to them boxes and boxes of shredding at a time or in some cases they can bring a shredding van to you.

If you have an ongoing need for shredding they can provide you with a locked bin that they can simply pick up when it is full. And they can take it to their facility for shredding or shred it in a truck. If you have just a small amount to shred, it is worthwhile to buy a small shredder. Typically you don't want to get the ones that are around \$20. They just don't hold up for very long. The better ones are in the \$80 to \$150 range. This is a worthwhile investment if you are anticipating having a need to shred things on an ongoing basis. The less expensive shredders, while they seem attractive at first, can usually only handle 2 or 3 sheets at a time and they tend to jam or burn out very quickly.

Whichever option you choose - whether to work with a professional shredding company or to have your own personal shredder, make sure that you have some method for disposing off your documents in a secure fashion.

For the other things that you will be getting rid of, make sure that you have a recycle bin somewhere in your office or near your desk that makes it convenient for you to simply drop things that you are done with into. Then when it is time to take out the trash, you can simply add what you have in your office to the rest of your shredding.

Well, you have reached the end of the paper management module. In this module we talked about how the paper less office just didn't quite happen. We talked about the life cycle of paper and how important it is to create dedicated spaces for each of the steps in a paper's life cycle including the inbox, the hot files, the archives and the outbox. We talked about some retention guidelines for how long to keep your different types of paper and how important it is for you to talk to your tax preparer. We also talked about some of the specific types of papers that you might deal with including business cards and receipts. We discussed strategies for stemming the tide of paper including getting rid of junk mail and switching to paper less or recurrent billing. And we looked at ways to help you get through a backlog if you've got a lot of old papers that you need to deal with. Finally we discussed options for how to responsibly get rid of the papers that you no longer want, need or use. Take a few minutes and fill out your next steps in your action plan in your workbook.



TECHNOLOGY

Introduction - Virtually all of us have or use some form of technology in our work - whether it is a cell phone, a computer or maybe even multiple computers, email or some such other technological device or service. Electronics are omnipresent in our daily lives especially at work. But for many of us these tools which were originally supposed to help us have instead become burdens. We need ways to manage all these things so we can focus on getting our work actually done instead of managing the tools that we use to do the work. This module is all about strategies for dealing with some of the most common productivity and organizing challenges that come from working with technology. We will talk in detail about how to get control over your email inbox, strategies for managing the files on your computer and more. It is all about making technology work for you instead of the other way around.

Client success story - A client of mine was completely overwhelmed by the email in his inbox. And with over 5000 messages in there it is really easy to understand why he might feel pretty overwhelmed. The messages that he had in his inbox weren't filed in any way. He said that it was hard for him to find or keep track of anything in the email 'black hole', as he put it. So we worked together to whittle the messages in his inbox down to a manageable amount - for him 50 messages was it. And now he feels on top what is going on in his email. You can too!

Identifying Email - In the world of technology and our work, few things can feel more overwhelming than email. We can't control when it comes in, we can't control how much of it comes in and we can't control what people are asking us to do in it. We are pretty much out of control when it comes to email. So we need to look for strategies and techniques that we can use to help put us back in the drivers seat of managing our email.

Remember the first time you received an email - your very first one. Maybe it was from a friend or a family member or a colleague - right when you first got your email account. It was probably pretty cool to receive an email. Someone out there cared about you. And it was nice.....for a while.

And then things started to change. You got more and more email. So much more that it probably became pretty overwhelming. And now it is just always there. And there is always something new waiting for you. And generally it is something that you don't usually want. That is the case for most of us.

I remember when I first received my email account initially years ago, I thought it was great. What a fun way to communicate with people. But in the world of work the emails that come in often represent just one more set of TO-DOs. If emails only need to be read that would be really easy. We could get through our email boxes pretty quickly. But just like each piece of paper that comes through our door doesn't just need to be read, oftentimes there are other TO-DOs or other actions associated with them, the same is exactly true for emails. Very few emails need only to be read and then closed. Oftentimes you either need to respond or pay a bill or follow up on something or do additional research. Just like with our paper.



Creating folders or labels - The good news - you have already spent time developing a system for managing your paper and all of the TO-DOs associated with that. Guess what? We can do a very similar thing with your email. All email programmes allow you to create either folders or labels which can help sort and separate your email. The first thing that we want to do is take care of the actions that are required in our inbox. And if we set up a hot file system, just like we did for our paper, we can actually sort and separate our emails into action categories that will make it easier for us to take the actions that each email represents.

So instead of seeing an inbox full of messages, each one requiring lots of different types of actions, you can instead create a series of hot folders that mirror those that you created for your paper. That way you can sort all the calls that need to be made based on the emails into a 'calls' folder; all of the e-bills could go into another folder; a third folder could be for things you need to research online.

Take a look in your workbook. There is a sample set of categories that you might want to create for email hot files - slightly different than for your paper-based hot files. But here is a suggestion. Try to create category names in both places that are as similar as possible. This will help streamline things as you move from one system to the other, from paper to electronic.

But the key concept here is that in order to act on our emails, we need a better system than just letting them sit in our inbox. We need dedicated spaces for the actions that they require just like we need that for our paper. Once you start separating your emails into actions, it is much easier to actually process them, rather than seeing them in a big jumble in your inbox.

Since we are talking about creating categories and labels and folders, this would be a good time to set up folders or labels in your email programme that mirror what is in the rest of your filing system. For instance, you are going to have certain emails that require actions - those would be in the hot files. But again, you are going to have ones that don't. You are going to have ones that just need to be filed or held on to. Those can go into an archival area just like with your paper files. So you may want to create folder structures that mirror what is in your paper system - the same category names, the same file names. That will make it again, easier for you to find things when you need them later.

Of course on the computer you can do something that you can't with paper. You can search for things and relatively pretty quickly and easily. But sometimes it is helpful just to have things in a certain spot. So you may want to have folders for each of your individual clients or projects or vendors. Or maybe you have something big that you are working on over time that might get a special folder and it might go at the top of the list. Look for ways that you can use the email tool itself to help you organize your emails in a way that makes it easy for you to find them later.

Having them in one giant folder which you search through is a start. But it is even easier if things are already grouped when you are searching.

So don't rely simply on the email's search function for you to find your things. Give it an extra boost by putting things in folders that makes sense for you. That will help you out later.



One really great folder to create or label to create, depending on your email system, is something for newsletters. Many of us receive email newsletters. They might contain entertaining, useful, helpful or just plain funny info. All of those are great. But we probably don't want to read them right when they pop into our inbox. Instead we want to read them at our leisure, when we have time. And that could be a while from now. They need a place to go until we actually have time to read them.

Filters or Rules - Create a folder for those newsletters or label. Once you do that you can use a tool called filters or rules to automatically sort your email for you. This can be a huge productivity booster. How this works is this: you set up a folder or a label in your email programme. Then once you have an email that you don't want to see in your inbox, you create a filter or a rule for it. And this is in your settings for virtually any email programme whether it is web based or that lives on your computer.

Essentially you tell your email programme, 'whenever a message comes in from this particular sender please forward it into this folder. Bypass my inbox. I don't want to see it, I don't want to read it until I have time to deal with it.' That way as new messages come in you can skip past those messages. You don't even have to read them. They will be in a special folder waiting for you. And you will know that there are messages waiting for you because that folder name in the list will be bolded. And usually it has the number of unread messages waiting inside.

You can try this feature called filters or rules for virtually any sender that you receive regularly. You might do this for specific clients, if you are receiving emails from a client all the time. You might set up a special folder for them. Set up a filter or a rule and then automatically when they send you a message it goes into a special folder.

This might be a great tool also for vendors, for resources that you use regularly. This can save you quite a bit of time because you don't have to read it in your inbox and think about it. And you don't have to file it. Those two things are already handled for you automatically by the computer. When it is time for you to process through your email then you can go into the individual folders and take the corresponding actions then. But everything's already pre-sorted for you, so it should be easier for you and less time consuming for you to go through your emails.

If you want more information about filters or rules, simply look in the *Search* tool in the *Help* in your email programme. They usually have lots of information on how to set these things up. It is very easy and extremely effective in time saving.

Strategies to deal with old emails - So, you might be saying, 'Great Josh. You've given me some tools for managing all the things that are new but I have 1000 or 2000 or 5000 messages sitting in my inbox. What do I do with those?' First you have to ask yourself does it bother you to have that many emails in your inbox? For some people that is perfectly OK. If it is OK then leave it alone. But if it is not then we need to look for some strategies for dealing with that. Here are a few.



The thing to note about email is that it gets old really fast - especially if you are receiving lots and lots of emails. The ones that you received last month or six months ago or last year may not be relevant at all anymore. So as email ages its relevance continues to go down.. The things that in your inbox that are pretty old, you may not need to deal with them at all.

Chunks - One strategy that I like to do with clients is we take things in chunks. We start managing the newer emails first and get it into a hot file system so that from today forward we can manage your email more effectively. And then after today's emails starting to be managed better, we go back and we go through the oldest emails and start archiving those. Chances are that as you go through the oldest emails in your inbox you are going to find a lot of them that can just be deleted. Very few of them will likely still need actions. So though there may be thousands of messages in your inbox, chances are you've probably already acted on a bunch of them. And chances also are that many of them that are left, you won't need to act on anymore because they are out of date.

So don't be scared or worried if you've got a large backlog of messages. I would guess if you are still in business you are acting on the ones that are really key already. This is about more so clearing out the space so that you don't see that overwhelming number in front of you. That is one strategy - working on the newest and then working on the oldest. And that is a really effective way to manage your older emails as well as your new ones.

Archive past a certain date - Another strategy is to pick a day - any day - and emails that have come in before that day you are simply going to archive. You create a new folder and call it 'Archive' and maybe you decide that January 1st of last year is when you want to archive everything prior to that day. You create a folder with that date. And then you move everything from that date and older into that Archive folder. If you need something you can always go back into it. But that method clears out your inbox pretty quickly. And again the things that are truly old are highly unlikely that they still need your attention.

A chunk a day - A third strategy. Work on a chunk of your email backlog each day. So lets say you have 5000 messages in your inbox. You could spend a few minutes a day - maybe 20 minutes - and your target might be to get through 100 of those messages. You are going to work quickly because again these are old and not top priority. So you are not going to want to spend tons of your time focusing on the ones you no longer want or need. Instead it's more so that you are looking for the ones that you still need to do which will be pretty rare. So you could a chunk a day - maybe 25, 50 or 100 messages and work overtime until you have cleared out that backlog.

Treasure Hunt - Another strategy. It is called the Treasure Hunt. You look through that backlog of messages specifically for the things that you still need to do and ignore the rest. So you are looking for the priorities or tasks, the treasures that are still in that inbox but that have been pushed down past the front screen of your messages.

Once you've found those and you have moved them into your hot files, then you can take the



rest and archive those. All the old messages can now be put away. So the goal here is to look for the things that are undone and move them into the system that you are now using for managing the tasks, instead of having them just sit in your inbox.

So there are a number of strategies that you can use to go through that large email backlog whether it is working on the newest messages and then the oldest or archiving everything prior to a certain date, working on chunks or going on a treasure hunt for the things that you still need to do.

You can try a combination of these strategies because each one might work for you in a different way. But have some strategy if you have lots and lots of messages in your inbox and they are bothering you. Have some strategy for managing them and going through them. That way you can clear up your messages and have your inbox be truly for the things that are brand new, just like your paper based inbox would be.

Set an inbox limit - Another strategy for managing your email is to set a limit or threshold for how many messages you want to let sit in your email inbox at any given time. For most of us when we see our inbox number creep past 25 or 30 or 50 or 100, we can quickly get overwhelmed because again each email doesn't need to be read. Most of them are TO-DOs of some sort. And when we've got hundreds or thousands of TO-DOs staring at us, it can be pretty stressful. So set a number for yourself for how many messages you want to let sit in your inbox - maybe it is 25, maybe it is 50, maybe it is 100. What ever it is for you, decide on what that number is.

Then as your messages start to come in, if you notice that you are starting to get past that number you've set for yourself, recognize that you need to set an appointment with yourself, a real life scheduled appointment, to work on processing your email. Because if you don't that number will simply keep increasing. And in order to keep it managed, you need to manage it.

Set aside time to check email - Speaking of setting aside time for email, it is super, super important that if you expect to keep your email under control that you set regular times to process it. Email, somehow, in the public consciousness is something that we are supposed to get to when we have spare time. But let's face it. Who has spare time? I personally don't know anyone who does. And let's say that they magically did have some spare time, would they want to spend it processing email? I doubt it.

So if email is important to you and to your business, make sure that you've scheduled specific times through out your day or your week when you plan on dealing with email. Email takes time to go through, just like paper does. And if you give it the time that it requires it won't become overwhelming. What I suggest is this. Set three times throughout your day when you process email - once in the morning, once in the early afternoon or after lunch and once at the end of the day. That for most of us will handle the email that comes in. Very few of us are on a 24 hour cycle where we are expected to respond to email instantaneously. If we process it 3 times through out the business day, it won't be more than a few hours before someone will receive a response from us. That is pretty good, even if you did it just two times a day, that is still very



effective.

So whatever your level of needing to be responsive is, make sure that you set a schedule around processing your email that fits with that. You don't want to do your email once a week and have 300 messages waiting for you. That is an ineffective strategy and it is generally not responsive enough in today's business world. But once, twice or three times a day is usually plenty. Find the balance that is right for you and block those times out on your calendar as a real appointment with yourself because that is the way that you will stay on top of your email.

Turn off message waiting indicator - A final thought on the world of email. One of the email bug a boos that I find with both myself and with clients is that little indicator that pops up in the corner of the screen letting you know that you have a message. This was probably really helpful when people weren't so immersed in the world of email. But most of us check our email pretty regularly now, regardless. We hardly need any reminders to let us know that we have a new message. By default we probably do have new messages and we certainly don't need the computer to remind us of that fact. So I encourage you to turn off the new message waiting indicator. You can turn this off in the settings of your email programme. Instead of having the message pop up, you've already scheduled several times throughout the day when you are going to be processing your email. So there is really no need for the reminders. The reminders really do only one thing - they distract us.

Let's say you are working on a word processing document. Maybe it is a proposal to an important client. Your message waiting indicator pops up saying you have a new message in your inbox. So you switch over, in the middle of working on your proposal, to your email programme. And it was just a newsletter that came in. But hey, since you are in your email already, let's take a few minutes and see what else came in in the interim. Well not really anything too important, but what was I working on before? Oh yes! The Proposal. So you switch back to your proposal and before you know it you have completely lost your train of thought and your productivity is shot into the toilet. Terrible! Waste of time!

So instead of having that indicator pop up, choose when you are going to process your email and process it at those times. Turn off the new message waiting indicator. You will be much more effective when you deliberate about checking your email.

Systems for filing emails - So we have talked about some strategies for managing your email. But what about all the other documents and files that live on your computer? Those need a system too. Because just like with our paper files we want to be able to find and retrieve and put away those documents really quickly and easily when we need them. Just as with email, most computers now have pretty effective search functions, but that still isn't as effective as just knowing where your things are. And with the systems that we are going to talk about now, you will know where your things are more often than not. And hopefully, definitely, more than you do right now.

One thing to keep in mind is that you have already spent some time and energy and effort at this point creating some structure for your paper files. You may have used a file map with



category names on them. Why not use the same tool for your computer based systems as well? Since conceptually putting things away is the same, whether it is in the physical world of paper or in the virtual world of the computer, we can use the same category names, the same structures, just like we do for our paper in the computer world. And actually the more that we do that, the more we use the same structures and the same folder style, the easier it would be for us to find and put things away in both places. Because we are not trying to think of new ideas for the same types of information. The information is the same in both places. It is just in a different format.

So we want to keep those structures that we use to keep those formats as similar as possible. So, ideally you want to use the same category names on your computer as you do for your paper. You might want to take your file map out and create a new set of empty folders on your computer that are based on those file names. Then you can open up a new window in your computer and drag your existing folders and files into that new structure that you just created. That structure should match what is in your paper. So it should be really easy for you to put things away in a similar fashion. You are basically just doing the same type of filing that you did with your paper, just in the computer instead of with the actual documents.

Paper filing is not exactly the same thing as the computer, however. Because the paper themselves don't need names but the files on your computer do. And that is why it is so important to have really effective naming strategies for your documents. You want to make sure that you name your documents effectively so that as you open a file full of folders, you don't have to search through and try to determine which is the actual document that you are looking for. Instead you want to name them really effectively.

Most computers now let you name things with a really long string of characters. So having things in the file name like a description of what the file is about, the version number, the date it was created, who created it - all of those things can generally fit in the file name itself. When those things are in the file name you can very quickly open up a folder full of files and very simply and easily find the one that you are looking for without having to open and close each individual file. This can be a major time saver. If you've ever opened up a folder full of documents and you had to open and close every single document to find the one that you are looking for, you know what a major waste of time that is. Instead, name your files really effectively.

There is a guide in your workbook along with some samples that you can mirror for your own files. You may not have time right now to go back and rename all of your old files using this new formats, however, I would encourage you, as you move forward and you create new files, instead of letting the computer automatically name the document for you whether it is untitled or the first string of characters that are in the document. Instead of letting the computer do that, take a few minutes, create a naming convention now which is simply a set of guidelines or a set of rules for what you want to call your electronic documents in the future. Use that structure for any files that you create from today forward. That way all of your new things will be organized in a fashion that make it much easier to actually find them and retrieve them later. When you have time you can go back to your older files and rename those and integrate them into your new



filing system. Again this will make it much more effective for you to find your documents when you need them.

Scanning - In addition to the files that are already on your computer or the electronic files that you create, you may decide that you want to do away with as much paper as possible. One of the ways to do that is by scanning. Scanning is where you take your papers and you put them into a machine called a scanner. And the scanner translates them into an image file that lives on your computer.

Advantages and disadvantages of scanning - This provides a number of benefits. It saves you the space of paper - you don't have to take up any space in your office for any files. Also once papers are in your computer and in electronic format, they can be searched just like you would search for any other document that is on your computer. Because the software that comes with most scanners reads the text that is on the documents and translates them into a format that your computer can then search through. This can be super helpful. It can make it a lot easier to actually find and retrieve the information that you are looking for.

One of the downsides however of scanning is that it often can be quite time consuming. If you have many drawers worth of files it can take hours to scan all the documents in. Now there are services that can do the scanning for you but they can be quite costly. So there are definitely plusses to scanning. You can find your things easily and it saves a lot of space. But there are costs that are associated with it as well. It is either your time scanning the documents or the costs associated with having it done through a scanning service.

If you are going to be scanning your documents, first you definitely want to weed through the documents that you have. There is no point scanning documents that you no longer want, need or use. So it is helpful to begin a scanning project after you have done a significant amount of weeding through your files.

Another thing to keep in mind is that if you are going to be doing scanning you need to set aside time for either doing the weeding or doing the scanning or both if you are going to be doing the whole project yourself. If you are not going to be doing the scanning yourself, you need to set aside time for sorting and separating the documents so that when the company scans them, it can name them effectively and put them into appropriate folders. They won't know automatically what to call your files so you will need to tell them what to call the files or the folders that you want the documents in.

Costs associated with scanning - Some of the costs associated with scanning: a desk top scanner - a good high speed one, not one that you feed the sheets through one by one, that will take forever - one that you can put a stack of 25 or 50 documents in, will generally cost you between \$300 and \$500 for a basic desktop scanner that comes with software.

A scanning service will cost a different amount. Usually they price it per page - usually between 5 and 20 cents per page, depending on whether the document is in colour or whether you want both sides scanned. A typical file box worth of documents will cost a few hundred dollars to



have scanned. So depending on how much you need scanned and how frequently you plan on doing your scanning yourself, one or the other option might be a better fit for you.

If you are planning on reducing your paper on an on-going basis it is helpful to have a scanner that sits on your desk at all times. And these can be extremely effective tools for managing your paper on an on-going basis. If you go down the scanning route know that it is a commitment. The papers won't jump into the scanner and scan themselves for you. So if you want less paper in your office, it is helpful to have a scanner around and have a set schedule for when you are going to scan your documents - whether it is at the end of every week or maybe a few minutes at the end of each day. But setting aside the time to manage this type of paper just like you would for any of your other papers is really essential.

Back up of data - If you are keeping any sort of important data on your computer, whether it is email, photos or your client documents, it is essential that you have a strategy for backing up your information regularly. Imagine what would happen if you lost this past week's or month's or year's worth of business data. For most of us that would force us to close our doors. We wouldn't even know where to start or how reconstruct all of that information. So if you have anything that you couldn't do without, if there was a fire or some sort of disaster or if your computer is stolen, it is essential that you have a system for backing up your information.

How can you back up data - This can be accomplished very simply. You can get an external hard drive or a flash drive or more frequently now I am recommending to the clients that they back up using an external data service where essentially there is a little programme that lives on your computer and when your computer is idle, when you are not using it, it sends little bits of data up to a secure server on the internet. And they store your data for you. That is effective because you don't actually have to do anything. Your computer does it automatically.

But it doesn't really matter so much what method you choose of backing up your computer. More so it matters that you do something. And it even matters more that you do it regularly. You don't want to backup once a in a while or when you remember to. You want it to happen like clockwork. Because again if you backed up 6 months ago and you lost your computer today, the data that happened in the last month or so is where the action is for you, not what happened 6 months ago. So you want to have a regular backup set of your data and you want to make sure that it is recent. So whatever backup method you choose, choose something. It is essential. And do it regularly. Your business could very well depend on it.

Working with multiple computers - Many of us have more than one computer at this point. We might have a desk top computer and a laptop or a laptop at home and a laptop at work. We often need access to the same data wherever we are. So that we can continue working on our projects wherever we happen to be. This can be pretty tricky. We might forget a file at home that we need at the office or vice versa. Or we are not sure which one the recent version is and we start working on one only to find out later that we have already completed some piece of it that was on another computer.

If you have multiple computers it is essential that you find some method for synchronizing your



data so that everything is the same all the time on both of your computers. There are a couple of different ways that you can do this. One you could save your information onto a flash drive and make that your base of data. You might keep certain projects on certain flash drives or maybe keep one flash drive that has a lot of capacity so that you can keep all of your important stuff on it. And then you would backup your flash drive of course. But your flash drive would be where you would work on the documents themselves.

Another strategy is to use software that can synchronize your different computers either locally over your network at your home or your office or over the internet. There are a few different sets of software that do this and these work pretty well. But my favourite method now is to use a service where not only does it synchronize your information across multiple computers, but it also keeps a secure backup of them online. And this is really helpful because if you were to lose one of your computers or if your computer broke and you did not have access to it or it was stolen, you could go online to the website for these different companies and then get a download of the document that you need to work on. So you have access to your stuff no matter where you happen to be. But the key idea here, whatever methodology you choose, is to not have different data in different places. You want to make sure that if you are in business and you are working on your stuff, that wherever you happen to be, you can use the same projects, files, documents without having to go back and forth physically between the different places where your computers happen to be. Your data should follow you, not the other way around.

Centralizing contact data base - Another type of technology that you might be dealing with is your contact data base. You may have a contact data base that lives on your computer - one that you keep on paper like a rolodex or a file of business cards. And a third set of contacts that live on your phone. It is not helpful to have different sets of data in different places. It is better to centralize all of your contact information in one spot, whether that be a web-based address book like Google or Yahoo or MSN or something that lives on your computer like address book on the Mac or Entourage or Microsoft Office Outlook. Choose a system and get all of your information into one spot rather than having it in multiple places.

Benefits of centralizing contact data base - This lets you do a couple of things: one it saves you time because it does not force you to look in multiple places for different pieces of information. Also when everything is centralized you can back up your information much more easily. That way if there is a disaster or let's say you lost your cell phone, you wouldn't lose all of your contacts along with that phone. They would be backed up on your computer. Similarly if there was a fire at your office, you would have a back up of your data some place else so that you can retrieve all of your contact information when you need it. So centralizing all of your contact data is essential. It can save you time and it can save your bacon if there is some sort of disaster or loss.

Another benefit of centralizing all of your contact data is that then you can easily sync it to most modern cell phones especially smart phones. These devices are designed to connect to your computer so that you can transfer all of that data and synchronize it so that your contact information along with other things like your calendar and your email are with you at all times. That makes it really easy to stay productive on the go. If you have a spare minute here or there



you can check email or work on your calendar or call an important contact. You will have that information with you all the time. The trick here is that you don't want to get into the 24 hour availability cycle. This I have seen with clients time and again where they get a device that is supposed to help them yet at the same time they feel completely beholden to it because it is constantly alerting them that they have a new message or that there is an email waiting or they feel like they need to work.

So it is important if you get a device like this to put some boundaries around how you plan on using it. You might want to turn off the alerts that let you know that you have a new message and instead check your emails or messages at specific points throughout the day just like you would with your computer based email. Don't feel beholden to this tool. It is meant to help you, not to be a burden.

Technology is great. It can help us manage our business in ways that were never before possible. And technology can also be a burden. The difference comes when you learn how to manage the technology that is in front of you. You can use it as an empowering tool rather than as a burden. And hopefully some of the strategies that we talked about in this module will help you do just that.

We've covered many strategies for helping to manage your email - from creating hot files for your email to creating folders or labels, filtering your emails so that you don't have to sort them yourself, dealing with a backlog of emails if you've got hundreds or thousands in your inbox. We also talked about setting limits for how many messages you let pile up in your inbox and setting aside time to deal with your messages when there are too many sitting in there. We talked about creating structures on your computer for filing and for your folders. We talked about the benefits and the challenges with scanning and whether or not it is right for you. We mentioned how important it is for you to back up your data and also how to work with your data if you have multiple computers. Finally we touched on centralizing your contacts so that you can have them with you wherever you go. And smart ways to work with your cell phone or PDA.

Take a few moments and fill up your action plan that is in your workbook as it relates to the items in this module 'Technology'.



TIME

I am a firm believer that everything organizing and productivity related in the end stems from how well we manage our tasks and our time. When we don't have a good sense of how we spend our days or how we can better use our time, there is no way that we can be as productive, efficient or effective as possible. This often leads to missed opportunities, loss of revenue and general overwhelm from looking at our endless To-do lists. The time module is dedicated to helping you learn easy ways to get a handle on all the things that you need to do. You will learn how to effectively prioritize, group, schedule and delegate your tasks so you can get the important things off your To-do list. We will also look at ways to manage your schedule and strategies for overcoming procrastination. But first, a client success story.

Client Success Story - A client who owns a small business was feeling overwhelmed by not only all the stuff in her office and on her desk but also with all the myriad tasks that would come up during the course of a business day. Even though she had administrative help and other forms of support, she just never felt like she was in control of her day. Instead she felt like she was always putting out fires. Sounds familiar? When we worked together we were able to centralize all of her To-do's and then effectively prioritize, delegate and schedule them so they could be accomplished in a more productive and effective manner.

The client's story that I just mentioned illustrates really well what happens for many people who start businesses for themselves. They have got so many tasks they need to do. They are usually wearing all the hats. All the different tasks that used to be accomplished by multiple people if they were previously employed, now generally have to be accomplished by one person - or maybe one person with a couple of support staff. Usually the person in charge is the one who is delegating the tasks and managing how things are getting done. And if that person has not set up good boundaries around working and hasn't set up easy strategies for managing the tasks and checking up to make sure that they are getting done, then things can quickly fall into disarray and overwhelm. It gets stressful just to run the business let alone to do the work that you are in business to do.

Setting boundaries - One of the key things to think about when you are trying to manage your schedule more effectively and manage your tasks is how are you going to set up the boundaries around your work life. Some people really like having flexible boundaries. And that is one of the benefits of working for yourself. You can have things set up how you like them. But I encourage you to think about what are some structures that you can put into place whether it is starting and ending work at the same time each day or working from the same place each day as we mentioned in the previous sections about space. Or maybe it is that you work with the same people on the same days each week. But having some structure with the same boundaries that can carry forth from day to day can help you be much more effective in terms of managing your time.

Setting business hours - One of the most important boundaries that you need to set is what your regular business hours are going to be. Again this can be as flexible or inflexible as you feel comfortable with. You are in charge - you get to set the parameters around this. But I



encourage you to set some parameters. For instance, you definitely want to choose how many hours each day you want to work and which days per week you want to be open for business. You also want to decide which hours each day will you open for business and when will you close the business day.

Once you have decided what those hours are, the days per week you are going to be open, the hours per day and your opening and closing hours, that is the general container for your schedule. Those are your working hours. You also want to factor in how many hours per week overall you want to work. This is something that varies from person to person. I've worked with clients whose goal is to work less than 40 hours a week. They want to work maybe 3 days a week or 4 days a week. And others that I have worked with are so passionate about their businesses that they are happy, elated to work 60 or 70 or more hours per week if they feel like they are using their time effectively.

Whatever it is for you, choose it deliberately. Then set your working boundaries to accommodate it. Again your boundaries are the days per week that you want to work and the hours per day. Once you've decided on that basic schedule, then it is time to let the people connected to your business know what that schedule is. If they don't know what your hours for being open for business are, how can you expect them to respond to them?

You need to be able to communicate these effectively to the people who are connected with your business. And those would be your vendors, your clients, your family, your friends, your business partners and associates - all those people need to know what your open and close hours are so that they can respect that boundary. That way you don't have clients calling you at 10.00 at night when you are really only anticipating being open for business until 5.00 pm. .

Think about it though. If you never communicate with a client that they won't be able to reach you at that time, how would they know? They might think that you are available whenever they happen to need you. And if that is the case for you, that is great. You want to let them know that. And if it is not, you definitely want to communicate when they can expect to reach you.

One thing that is effective also is to let people know when they can expect to hear from you if they don't reach you during open business hours. So for instance, if a client calls you during your regular business hours - let's say they call you at 4.00 p.m. and you are open until 5.00 p.m. - and they don't reach you, you might want to put in your outgoing voice mail that they can expect to hear from you within once business day. So that the expectation gets set.

Once you've decided on these hours you can let people know what those hours are in a variety of ways:

- You could post it on your website
- You could leave it on your outgoing voice mail
- If you have a retail storefront or dedicated office space you could post it on the door

But you need some way to effectively communicate this to the people connected to your business so that again they will know and you won't have to explain it to them every single time.



In your work book there is a sample space for you to start filling in what your business hours are. That way we can start filling those hours in with the different tasks that you will need to do during the course of a business day.

Time Blocks - Once you have created that basic container for your time - the days per week that you want to work and the hours per day - then you need to start blocking your schedule out with the different types of tasks that your business requires. There are three basic types of time blocks that I would like you to create and there is space in your work book to do this.

First is **production time**. This is time that you spend actually doing your job - whatever it is you are in business to do, whether that is your service or your product - whatever it is that you are in business for - this is when you do it. This is your production time when you actually generate revenue from your product or your service.

Then there is **marketing time**. This is time you spend getting the word out about your product or your service. This is the time that you spend selling or going to networking events or generally marketing your work. This is not directly revenue generating but if you don't do it there will be no revenue coming in the door. So it is important to block out time for doing this.

Then there is **administrative time**. This is the time when you spend managing your business - returning phone calls, processing your email, doing your filing or organizing, paying your bills, professional reading and development - all of those things that a business person needs to do but that again just like marketing time does not directly generate revenue. But this helps you do your job better and generally if you don't do these administrative tasks your business won't be very successful for very long.

Scheduling breaks - Also it is important to schedule breaks . It could be lunch breaks or short little breaks through out the day. But what I've noticed when people don't schedule breaks is that they don't take them. And when people don't take breaks their batteries get burned out really quickly. Even short little breaks like a 5 minute break or a 10 minute break here or there throughout your day where you completely step away from your work, can be extremely effective in helping to recharge your energy batteries. And having your batteries fully charged for your work is essential if you are planning on doing it over an extended period of time.

What you don't want to do is work and work and work and work and get so burned that you can't imagine working anymore and then leave your business. Instead, if you schedule short breaks throughout your day - a lunch break and maybe one or two breaks throughout the rest of the day, that can be enough to give you enough rejuvenating energy to keep you going throughout the entire week. No breaks = no energy. So make sure that you schedule at least couple of breaks for yourself throughout the course of the business day.

Now take your workbook and spend a few minutes determining how you want to build your time blocks into your day. A tip here - if you know that you are more of a morning person or more of an afternoon person, schedule your time to accommodate that. For instance, if you know that



you are more of a morning person you might want to schedule your most important business tasks for that time. So if you determine that your most important tasks are meeting with clients and you are in a service based business, you might want to try to schedule as many of those for the morning as possible. Maybe you schedule your other tasks for other points throughout the day.

The reason why you want to do this is when we schedule things when we have most energy, we automatically do a better job on them because we are more alert, we are more awake and we simply have more energy for the tasks at hand. So use that to your advantage as you are trying to make the most of your day. Schedule your time blocks for your most important tasks when you know you are going to have the most energy.

Now that you've got your schedule blocked out to accommodate all the different things that you need to do during the course of a business day, you need to start filling in those time blocks with the different tasks that are associated with each type of grouping.

Managing to-do's - Most of us have some form of to-do list, whether it is notes we keep on our phone or a list we keep on the computer or maybe we keep pieces of paper around with different lists on them. To-do lists in and of themselves are not effective scheduling tools. Rather they are great for capturing ideas as they come up but they are not effective for actually getting them done. The reason why is there is no associated time with each of the individual tasks that is on there. Instead it is a kind of a nebulous, limbo state for these tasks - 'Well I need to get to them. I am not sure when. They are kind of hanging out and they are stressing me out on top of it.' So we need to utilize our to-do's and our to-do lists a little more effectively in order to actually get them done.

Master to-do List - What I recommend doing is this: **have one master to-do list**. If you have multiple pieces of paper around, also some lists on your computer or your phone, maybe you've got some post-its or sticky notes with lists or to-do's on them, try grouping those all into one notebook or one master list on your computer or one place on your phone. Keeping track of multiple lists and multiple pieces of paper with to-do's on them is simply too difficult. It wastes your time and it is air prone. It is so easy to lose a little piece of paper that has a to-do on it. When you have everything in one place you will know where you can always look for where your to-do's are living.

The first step in managing your to-do's is to centralize them. If you've got them in multiple pieces now, take a few minutes and put them all on one master list. That way you can get a better lay of the land of what is in front of you. Make that your master to-do list so that all of your tasks from here forward can be found in that one spot. When you do create a master To-do list make sure it is in a format that is easy to take with you wherever you might go. So if you know you are the type of person who will never carry a notebook with you, you might want to look for a small pocket book or maybe something that can live on your phone that you can use to capture your to-do's. But make sure that you carry something realistic.

I have one client who bought a beautiful, leather-bound three ring binder that she insisted she



was going to use as her master to-do list. When I saw it and I picked it up and saw how heavy it was, I thought there is no way this is going to work. And lo and behold, she said she tried it for a day, and it did not fit in her purse or briefcase, so it never went anywhere with her. She went back to writing things on post-it notes. We had to find something that was in a different format that would work for her, and it turned out a small half-sheet spiral bound notebook did the trick. So whatever size makes sense for you, make sure that you choose a to-do list that can travel with you wherever you might be because you want to be able to capture ideas wherever you are as they come up.

Prioritizing To-do's - Once you have all of your to-do's in one central spot, then it is time to start prioritizing them so you can effectively schedule them. I like to use a system called **1-2-3 D**. Next to each of your to-do's in your note book or in your work book, write the number 1 for the things that you must do - and soon. Write a number 2 for the things that need to be done, but not right away. And write a 3 for things that you'd like to do someday but if they never get done, it won't be the end of the world. Finally, write a D next to the items that you know right away could be delegated to someone else - whether it is someone on your team, a virtual assistant, or someone that you are planning on hiring at some point in the future.

Prioritizing your tasks in this way makes it much easier to schedule them. As you look down your list and you are writing in the 1s, 2s, 3s and Ds, try to be pretty ruthless about what things might not be that important after all. We often tend to associate equal level of importance with all of our to-do's, when in reality things just don't work that way. There are always going to be some things that are more important or more pressing than others. Make sure that you give those things that are more important the number 1 or number 2, and the things that may seem important at first but in reality aren't that important, give those a 2 or a 3.

As you go down the list a second or third time, really look at each item and ask yourself, "do I need to do this task myself? Or could someone else even potentially do it for me?" If someone else could handle the task, write a D next to it, and then you can look at ways that you can delegate that task to someone else. Maybe not even today, maybe not even in the near future, but maybe at some point down the line that type of task could be given to someone else for them to do. Remember your time is extremely valuable, and the areas that you want to focus are generally the 1s and the 2s. You may be able to delegate in the future the 3s to someone else, maybe even the 2s. But you really want to focus your time on the 1s. So go through your list and write down the 1s, 2s, 3s and Ds (there is space in your workbook to do this). Evaluate which tasks are more important, which ones are less important, which ones can go away completely and which ones can be handed off to someone else for them to do.

Now that you have prioritized your tasks, there is one additional step before you can actually schedule them to be completed. In the column next to each of the tasks, write down how long you think each task will take to actually complete. This is another key thing that is missing from most to-do lists - the estimate of how long a task will take. When we don't estimate or even just guesstimate how long we think something will take to do, there is no way to effectively schedule it. Just having a list of things that you need to do during the course of a business day isn't enough, especially if you've packed it so full of things that they could never actually be



completed or with not enough things to fill the time effectively.

So go down your list of tasks and write down how long you think each one will take. Maybe you could use as a guideline how long things have taken for you to do in the past. That is a pretty good way to estimate how long things might take in the future. If a task is brand new and you haven't done it in the past, think about how long similar tasks may have taken you in the past. That way you can start getting an estimate of how long these might take you to do in the future as you are scheduling them.

Scheduling - Once you have estimated how long each of your tasks will take and you have prioritized them, then you will know not only which tasks you need to schedule first but how much time they will take once you've put them on the calendar. Start by taking your number 1s and plug them into the associated time blocks on your calendar. For all of the things on your to-do list it is likely that they will fall into either production time, marketing time or administrative time. Since you already have time blocked out for each of these types of tasks, you can simply take the tasks from your to-do list and plug them into the corresponding time block on your calendar. You already have time set aside for them, and since you have estimated how long each task will take, you can simply plug them into the time block that is already waiting for them.

First, go through your list and look for the 1s, and plug those into your schedule. Then, move on to the 2s and plug those in as well. If there are spare moments or time blocks left over, feel free to plug in the 3s or maybe give yourself a break. You will also want to schedule yourself a little bit of time for delegating tasks if that is something you are planning on doing. Anytime you delegate a task, it does require some time for you to manage the delegation process, so make sure you set aside time to manage that as well.

Of course, just scheduling your tasks does not automatically mean that you are going to accomplish them. It is essential that you actually use the schedule and do the tasks at the time that you are associated with them in order for you to effectively manage all of your to-do's.

One thing that is nice to do is to have, in addition to your to-do list, a **done list** where you list all of the tasks that you have actually completed. In the chaotic busyness of any person's business world (and most of our lives in business are pretty crazy and chaotic), it is easy to forget that we **are** actually getting things done. When we've got endless to-do's coming our way, it is hard to remember all of those things that we have already accomplished. That's why it is nice to have a done list where you can write down the things you have actually achieved, accomplished, or finished during the course of a business day. I'll bet that you are actually doing a whole lot during the course of the day, and if you could remind yourself of that fact, it can be extremely empowering. So in addition to your to-do list, I encourage you to have a done list where you can write these things down.

In terms of actually getting your tasks done you've scheduled them, it is important that you stick to the schedule you've created. If something comes up and you are not able to finish your task at the time that you have scheduled it, simply move it to the next available time block for that type of task. You already will have these things blocked out in your calendar. If you are not able



to get to something don't feel too bad about it - simply move it to the next available time block. Shift it until you have actually completed it.

This can be an effective strategy for managing things that take longer than you might expect, especially if tasks keep getting pushed off your list. One thing to know though is if you are continually not getting to a task even when you are scheduling it over and over, that may mean that the task is not that important and can be crossed off your list, or it might mean that you need additional assistance in getting it done. That task could be something to delegate or to subcontract to someone else.

Interruption-based days or professions - If you're a real estate agent or in another profession where you are frequently interrupted, don't or can't have a set schedule, or are constantly responding to client calls, you might not be able to have these large time blocks that other professions who have more office-based jobs might. So the answer for you is to have smaller time blocks with bigger buffers of empty time in between. That way when you don't have a client that you need to respond to, you can work on the tasks that are within that time block. As you are responding to client fires, you can shift your time blocks around so that you have the time to respond to your clients' needs. You'll have to do a lot of shifting, but that is the nature of the work that you are in. As long as you have some things blocked out, some sacred time to process email or do your administrative or your marketing, you should be able to effectively still manage your time by shifting your time blocks around as needed.

This has actually worked very effectively for a number of my clients. At least we can schedule some of the tasks when they know they won't be interrupted by clients, and for the times when they know they may be interrupted, their time blocks are broad enough that they can shift them around in order to accommodate the needs of their clients.

If you are in an interruption-based profession, make sure your time isn't scheduled down to the minute - that won't be effective for you. Instead, build enough flexibility into your schedule so that you can shift things around to accommodate both your needs, your business' needs and the needs of your clients.

Spare time - This next topic isn't something that actually happens all that often, but I do get questions about it. What do you do when you have spare time? If I had spare time I would probably take that time to not do anything at all, but let's say you actually want to accomplish something if you have some spare moments. What can you do during those times? You may choose to go down your master to-do list and look for the number 2s or 3s, which are great to work on when you have free time. You may also choose to use that time to take a break - you can take a few spare moments to walk around the block, call a friend, or look something up online that is completely not work related. Breaks like these help recharge your battery.

A third thing you could do with a spare moment is to catch up on some professional development or professional reading. These are the types of things that often get pushed aside during our other more high priority task times. If you have a few extra minutes, that is a great time to catch up on those things that can help keep you sharp professionally.



Procrastination – Far more likely than us actually having free time is us instead procrastinating on doing the tasks that we know that we need to do. The truth is everyone procrastinates about something, sometime. There are always going to be some tasks that we just don't want to do, don't like to do or don't feel like we need to do at a given time. However, we would not have scheduled them for ourselves if they weren't important in some way, so we need a strategy for figuring out ways to get over the procrastination hump and help us actually get to the tasks that we need to do.

Here are a few strategies that I have used with clients that I've found particularly effective:

1. The first one is keep the **goal of the task** in mind. Rather than focusing on the task itself - the task that you may not be so excited to do - instead focus on what doing the task could bring you. For instance, will doing the task help bring you closer to generating additional revenue? Will it help you land an important client? Will it bring you more enjoyment, pleasure, or more professional development? Think about what the end result is rather than the task itself, and that can be a very powerful motivator to help you get more motivated to do a task that you are not initially excited about doing.
2. Another strategy: give yourself a **reward for finishing a task** that you don't like to do. The reward could be a big or as small as you would like it to be. For instance, finishing a task that you don't want to do means that you will get a reward of calling a friend, going out to lunch, or reading something online that is completely not work related. Think about ways where you can reward yourself for doing something that you don't like to do. A reward can be a very powerful motivator.
3. Another strategy is to give yourself a **deadline for finishing a task**. Even a false deadline like a kitchen timer can be very powerful as a motivator. For some reason, many people respond well to having deadlines. That doesn't mean that they necessarily like them, just that they tend to work better when the clock is ticking down. With clients I use a kitchen timer, and we sit it on their desks. We'll set an amount of time for finishing a given task, and then we will work to actually accomplish the task itself. Having a desk timer or kitchen timer that you can see is much more effective than having a timer that lives on your phone or your computer. There is something about hearing the ticking and seeing it ticking down that makes it more powerful than something that just is nebulous or virtual on your computer or phone. Try giving yourself a deadline for a task that you don't like doing and see if that is an effective strategy for helping keeping you motivated.
4. Finally a more advanced strategy. Try **grouping all the things that you don't like doing** - all the tasks that you regularly procrastinate about and put those in one giant time block. You might call this time block "tasks I hate" or "things that I don't want to do" - whatever it is for you, try grouping those into one time block, and taking care of them all at once. This can be a great way to end the week. For instance, if there are a bunch of things that you don't like doing, but you know you need to do them by the end of every week, you could group them all for Friday afternoon. Do them all during that time and then you can start Monday



without having those things hanging over your head.

These are just a few common strategies that I use with clients to help manage procrastination. In your workbook there is space for you to note down what some strategies are that you might like to use. You could try these, or perhaps others that you think of on your own. It is important that you can recognize that all of us procrastinate at some point, and that in order to overcome it we need a strategy (or strategies) to manage it. What will yours be?

Multi-tasking - I get a lot of questions on multi-tasking: How to do more at once, ways to manage more tasks in less time, and how to basically be a super-person. I am not a huge fan of multi-tasking. I think it distracts us by its very nature - by definition, you are doing multiple things at one time. And most studies have shown that when you multi-task, you take up to four times longer to actually do each of the individual tasks than if you had simply done the tasks on their own.

So there isn't a real benefit to multi-tasking. Although it may seem like we are doing more at once, in reality if our tasks are taking longer, it is not worth splitting our focus. In addition to how long things take when we are multi-tasking, it does not account for the quality of each of the individual tasks. When we focus on one task at a time we are able to devote all of our attention, resources and energy to it, and we tend to do a better job on the task when our focus is undivided. When we are splitting our focus, there is no way that we can devote all of our energy to any one of those tasks because by definition we are doing multiple at once. Instead, give each task the time it will take to accomplish it effectively on its own. You already have the time blocked out on your calendar, so use your schedule effectively to manage each of those individual tasks rather than trying to accomplish multiple at one time.

I know managing your time, your tasks and your schedule can seem pretty overwhelming at first, especially if you have never effectively done it before. But hopefully using some of the tools and strategies in this module, you'd be able to do it more effectively than you have in the past.

In this module "Time," we talked about setting office hours and creating your basic container for your schedule. We talked about creating time blocks and how important it is to take breaks. We discovered ways to manage your to-do's, your to-do lists, and how important it is to have one single to-do list rather than multiple. Once you wrote down your to-do's we looked at how to schedule and prioritize them so that they can be effectively completed. We looked at how to manage things like interruption-based schedules and what to do with spare moments that pop up. We talked about strategies for managing procrastination and why multi-tasking is not so effective.

Time management really plays into all of the other elements of the Profitable Productivity System. Take a few minutes and fill out your action plan and see if there is any overlap between the types of things that you were looking at doing such as organizing your papers or managing your space or your clutter, and see if any of those tasks dovetail into the new schedule that you have created for yourself using the tools you've learned in this module.



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Take some time and fill out your action plan and bring all of those elements together.



MAINTENANCE

Introduction - Any system, whether it is the engine in a car or an exercise program, requires maintenance for it to continue to serve you. And the same is true for your productivity and organizing systems. By continuing to use, tweak and improve your systems you will continue to reap the benefits of having them in the first place.

In this module, maintenance will look at easy ways to keep your systems working for you. If you have already spent time and effort to get your system set up, maintenance will help ensure that they will serve you well into the future.

Client Success Story - I worked with one client to help him organize his home office from top to bottom. Everything was included, from the layout of the furniture to scheduling and paper management. By spending just a few minutes a week maintaining his systems, he's been able to stay at peak productivity for several years.

Staying organized and being more productive and effective is a commitment. It is a commitment to yourself and your success. I would argue that any time you spend maintaining your systems or updating them to continue to meet your needs, is time well spent. Anything that you can do to tweak or improve your systems that can help you work more effectively or generate more revenue is a smart investment in your time.

No doubt about it, maintaining your systems is a commitment. Just like if you were engaged in a fitness plan, continuing to go to the gym or eating healthy is a commitment. This is a commitment to yourself. I encourage you to recognize that it's a commitment and be okay with it. That doesn't necessarily mean that you're going to spend every waking moment maintaining your organizing systems. In fact, that is what I DON'T want you to do. Instead, I want you to look for ways that you can build organizing and keeping your systems and your productivity at top level - build that into your life in a way that makes sense for you.

You are going to have to build new habits around staying organized, especially if you have never done so in the past. And the habits can be really simple. It might be an extra 15 minutes at the end of the day to keep your systems up, especially as you are first learning them. Maybe it is once a week you spend an hour or two keeping your systems up to date and putting away any additional clutter. Look for the systems and the strategies that you can build into your own life that will help you keep the systems up to date and keep them refreshed, so that you can continue to use them over time.

Maintenance Strategies – Let's look at some specific maintenance strategies for each type of the systems that we talked about:

Space: Start by putting things away right away after you have used them. Once you take something out, don't let it sit around after you are done using it. If you put it away right away, you won't have to spend any of your time later - it will still be fresh in your mind where it belongs. So as soon as you have completed a task, instead of letting it sit at your desk, why not



put it away immediately?

Set aside 15 minutes at the end of each day to clean up that day's worth of new clutter. Don't wait until the end of the week where you will have to group it and create an hour or two hours. It is much easier for most of us to carve out an extra 5, 10 or 15 minutes to clean up rather than an extra hour or two hours or half a day. If you stay on top of your systems by doing a little bit at a time, it will be much easier for you to maintain it.

Every six months take a couple of hours and go through everything that is in your storage system, on your desk and around it. Weed through everything as if you have never done it before. Try pruning everything again, using the same set of guidelines that you did initially. If there are things that you haven't seen or used in the previous 6 months, it might be worth re-evaluating whether they are worth keeping. If you maintain a schedule of evaluating your things every six months your office will stay clutter free.

Paper - Keep your paper management supplies close by to where you actually work on your paper - that means your file folders, your labels, your label maker - keep all of those things nearby where you actually sit and go through your papers. That makes it easy for you to create files immediately right as you are working on your documents, instead of having to create a bunch later. This helps you stay organized right as you are in the middle of a task rather than waiting until later to get organized.

Make sure that you schedule time to process your paper. You might want to put some time during your administrative block to work on processing what is in your hot files, or to go through what is in your administrative or your archive files. Make sure that you set aside time to actually go through your documents and process them as needed. They won't happen on their own.

Just like with your space, weed through and prune what is in your files around every six months or so. In file drawers things can quickly become dormant and outdated. That is why it is important to very regularly, at least every 6 months (maybe even more frequently if you process a lot of paper), go through those things and weed through them. Make sure that you are keeping what you actually need. Using the same set of guidelines and questions to ask yourself, you might want to go through your documents and make sure you are keeping what you actually want, need or use and especially as it relates to paper, keeping things that are still current.

Technology - Make sure that you back up your files regularly as we previously mentioned. Also you want to make sure that you do system updates regularly to update your software and your antivirus. As for your contact list that you keep on your computer, this is something that you want to review quarterly. You don't want to wait until every six months or even once a year because it is too easy to forget who these people are. Make sure that everyone in your contact list is someone that you actually want to contact.

Just like with your space and your paper files, weed through your e-files every six months or so. Again, make sure that everything you are keeping is current and that it is something that you want, need or actively use.



Time – Keep your To-Do lists close by to wherever you are. That way you will make sure that you will catch any new business ideas, to-do's or actions right as they come up. You won't have to waste time wracking your brain trying to figure out what you were thinking of at that meeting a few hours ago. Instead keep your lists close to you and you can jot things down immediately.

Take some time to review your schedules daily and adjust the time blocks as needed. Things will happen over the course of the business day and they will force you to shift some of your schedules and your tasks around. Make sure that you take the time to adjust your calendar as needed. As you are going through your to-do lists and you are marking things off as a 1, 2, 3 or D, as time goes on look for an ever-increasing number of tasks to delegate. You are likely to get busier as time goes on, and your time will be more and more valuable. Look for the things that you can delegate so that you can focus on the tasks that are critical for you to do.

Changes to your system - Beyond maintaining your systems you may decide that you want to re-evaluate the systems that you have in place or adjust them to better suit your needs. That is perfect because that is exactly what this system is designed to do. Any organizing system needs to be tailored to meet the needs of the person who is going to be using it. So as time goes on and you notice that something in your system is not serving you as well as you may have originally intended, take the time to make the changes to your systems that will help them work better for you.

In your space, try shifting the storage location of items if they are not within easy reach. Or maybe you thought that something you would need all the time, you kept close to you and you ended up not needing it at all. Try moving that further away.

Also, over time as your storage needs change you may need to add additional storage or remove storage that you no longer need if you have cleared some things out. Adjust your storage as time goes on.

With your paper, try re-categorizing or re-naming files that you are having a hard time finding. You may want to switch the locations of files. For instance, instead of having things in alphabetical order, you may decide that your most frequently used files are going to go in the front of the drawer instead of in regular alphabetical order.

If you've noticed that you don't like using vertical files, you might want to use a horizontal filing system, where you can pile papers on top of each other using dividers. There is no one right way to file and there is no one right set of category names, so make sure that you choose the names of the categories that make sense for you and file in a system that suits you.

With your technology, you might want to adjust how many emails you want to let sit in your inbox at any given time - you might want to adjust it up or adjust it down. You may also find that you are not spending enough time processing your email. Or maybe you are giving yourself too much time. So you want to either increase or decrease the amount of time you have set aside on your schedule for processing through your email. Also over time, if you haven't considered



scanning your documents before, you may decide that you like the idea of it and you may want to reconsider it for the future.

With your time, as time goes on evaluate how well you do at estimating how long your different tasks will take. If you have noticed that consistently you are squeezing yourself because you have underestimated how long your tasks take, try making sure that you add an extra 15 - 20 minute buffer to each of the tasks. As you are blocking things out, you are constantly giving yourself more than enough time to finish the tasks that you need.

Also consider adjusting the location of the time blocks during the course of your business day. You may find that they are simply not working where they are located during the hours when you initially thought. Instead, move and shift them around and see how well they work for you in different slots.

Another strategy for managing your time is to revisit your priorities. What I've noticed when I work with clients is that at first every single task on their To-Do list seems like it is a number 1. But in reality we don't have only number 1s - there are different levels of priority. So really learn how to evaluate what is truly important versus what is just nice to do, and adjust those accordingly in your time logs and adjust the blocks to accommodate them.

A great strategy for maintaining your systems over time is to have an organizing buddy or partner who can be there for you during the process. Just like if you work out, you know that if you have a partner to go with, who can help get you motivated and get you to the gym when you may not otherwise not feel like it, having an organizing buddy can help get you through the rough patches when you don't feel like maintaining your systems. This could be someone who you call once in a while to check in with how their different systems are doing and how yours are doing. Or maybe the two of you meet at each other's locations so that they can help you with the actual physical organizing work and vice versa. Whatever you do, whether it is in person or over the phone, having some accountability that is outside of yourself can be a very powerful motivator to continue to make progress and be successful with your productivity in your organizing systems.

List in your workbook 3 people who might make good organizing buddies for you and what you'd want to ask them to help you with. And what you could offer them in return - what sort of organizing assistance could you help them with?

Scheduling organizing time - In the save-the-best-for-last category, probably the most important strategy that I can recommend for maintaining your productivity and organizing systems over time is that you schedule time to maintain them. No matter how great the system is that you have set up, no system can completely maintain itself all on its own. All systems require some input from you because, after all, they are your systems - they are designed to meet your needs. So it is up to you to continue to use them and maintain them over time.

The most effective strategy for doing that is to make sure that you have put time in your schedule - real appointments with yourself - to maintain your systems. Again that can be as little



as 5 or 10 minutes a day or may be a larger time block like an hour or two a week. It all depends on the systems you've set up and how much maintenance they require. But all systems require some. So make sure that you have set aside adequate time to ensure that your systems continue to serve you over time.

Customize systems to suit you - An important thing to note here is that your systems are designed to be flexible. Everything we've talked about in this program is meant to be adjusted to meet your needs. We are not looking for rigidity - we are just looking for structure. So don't feel bad if you have tried something with your organizing systems and it hasn't worked right the first time. More often than not, systems need to be tweaked in order to really suit your needs. So if you have noticed that something hasn't been working for you, change it. That's what this system is designed to do. So adapt systems, change them, modify them, use them and work them. They are designed to work for you, not the other way around.

Conclusion - In this module, "Maintenance," we talked about how important it is to recognize that being productive and being organized is a commitment that takes time and effort. Building the habits associated with maintaining these systems is critical in how well the systems will serve you. We talked about some strategies for maintaining your space systems, your paper systems, your technology and your time management, and how to evaluate and customize each of those systems to make sure that they are meeting your needs. We talked about the value of an organizing buddy and scheduling organizing time.

Take a few minutes and fill out your action plan in your workbook to make sure that you've addressed how you plan on maintaining your systems over time.