



The Profitable Productivity System

Simple, Proven Strategies to Get Organized and Boost Productivity!

Joshua Zerkel, Certified Professional Organizer®



www.customlivingsolutions.com

PO Box 411564
San Francisco CA 94141
415-830-6345

For more information on other programs and services, email us at
info@customlivingsolutions.com.

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Introduction:

How much money are you losing because of disorganization?

Did the project you charged 2 hours to complete really require 4 because you were interrupted so many times responding to emails and voicemails? How much time did it take to gather all those important documents from your cluttered email inbox before you could get your work started?

Sometimes it's difficult to acknowledge your lack of organization until you start to see how it is affecting the bottom line of your business. Now more than ever, you cannot afford to be unproductive and ineffective. Let us help by assessing your organizing processes, systems and environment.

On average, how many hours a month do you waste as a result of your disorganization?

How many hours per week do you waste being disorganized? _____

Hourly billing rate _____

Total cost per week (Hourly billing rate times wasted hours per week)

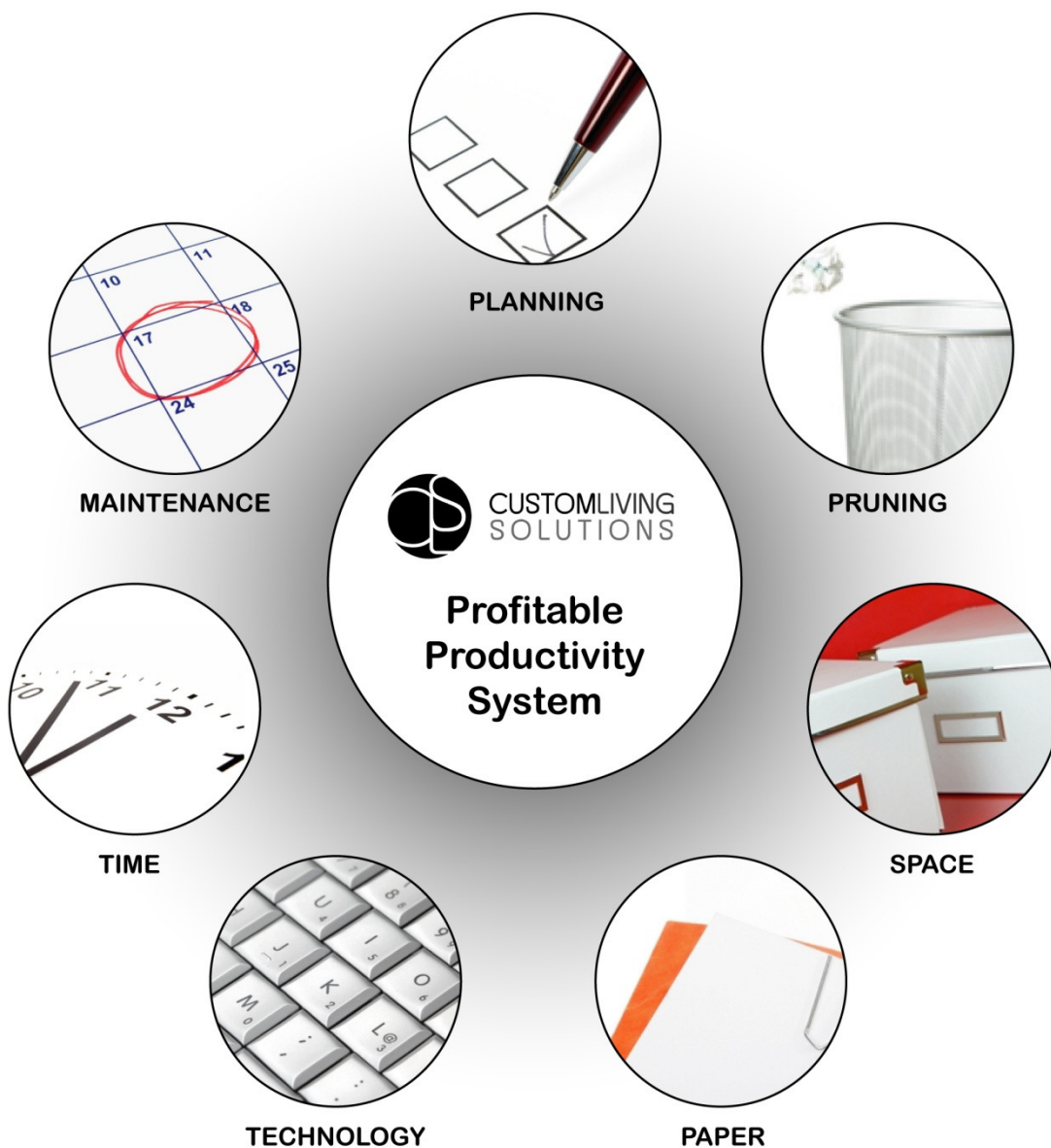
Total cost per year (Total cost per week times 52) _____

In today's business climate, aren't just a few hours a month too many to waste?

Introduction:

The Profitable Productivity System

This system, outlined in the diagram below, is designed to help address the key areas that every business, no matter the size, needs to address to stay at peak productivity. The Profitable Productivity System works best if you start at the Planning step and move forward from there; however, feel free to jump in at any of the topic areas if you have a specific need to do so. You can always circle back and attack the other areas later!



Planning: Reasons for getting organized

What are your reasons for choosing to get organized?

Some common reasons:

- Save time
- Save stress
- Save money
- Save space
- Improve business processes
- Simplify complex systems
- Stop missing opportunities



What is prompting you to get organized now, instead of at some point in the past or the future?

Planning: Setting goals

What does “being organized” mean to you? Think in terms of function (how well things work), form (how things look or appear), and feeling (how you react to a space or systems, how a room or space feels to you):



What are your goals for getting organized?

What about your current space or systems works well for you?

How will you know when your organizing projects are completed to your satisfaction? Is there a specific way a room or space will look? Will a specific task take a certain amount of time less than it does now?

Planning: What are your biggest organizing and productivity challenges?

My top three organizing challenges are:



1.

2.

3.

For each of these three challenges, please describe how they are affecting you and/or your business. For instance, a challenge could be affecting your bottom line, your level of stress, or your ability to serve your clients/customers as well as you'd like to.

1. How is challenge #1 affecting your business?

2. How is challenge #2 affecting your business?

3. How is challenge #3 affecting your business?

What about your current space or systems does not work well for you?

What's the biggest obstacle in the way of you being as organized as you'd like to be?

What challenges have kept you from getting organized in the past?

What support do you have around the organizing process? Are there other members of your team that can help you with implementing and maintaining systems?

Planning: Assessing your space/systems

Sample assessment form – create a copy for each of your spaces/systems that you’re looking to organize.



Room/System Name:

Detailed Problem/Solution Description(s):

Challenge/Problem	Solutions

Notes:

Planning: Sample Action Plan

NOTE: You'll find another, blank copy of the Action Plan at the back of this workbook for your use.

This first page of the Action Plan lists your major projects, in the order in which you plan on accomplishing them.



List of Projects/Rooms

- ☐ 1.
- ☐ 2.
- ☐ 3.
- ☐ 4.
- ☐ 5.
- ☐ 6.
- ☐ 7.
- ☐ 8.
- ☐ 9.
- ☐ 10.

Notes:

Planning: Sample Action Plan - Details

This second page of the Action Plan lists the details for each of the projects, rooms, or systems that you've identified on the first page of the Action Plan. You should create a copy of the Action Plan – Details page for each of the rooms/projects/systems that you are going to organize, and fill out each of the sections below accordingly.



Project/Room:

To Prune (items to weed through):

<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

To Sort (items to group into categories):

<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

To Buy (supplies to purchase):

<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

To Move (items to move to specific places):

<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

To Do (sub-projects, things to create, research, etc.):

<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Pruning: Keeping what's useful or important

Helpful questions to ask during the Pruning process:

- Do I actively use this item?
- Do I need this item?
- Do I want this item?
- Do I love this item?
- Do I have enough space to keep this item?
- Is this item still relevant or current?
- Have I ever used this item? How recently?
- When, specifically, might I use this item again? How likely is that to happen?
- Can I get this again easily if I need to replace it?
- What's the worst thing that could happen if I were to get rid of this item?



Pruning: Donation and recycling resources

As you're pruning your belongings, look for ways to pass on your items to someone else who could use them. Finding the right homes for your items can make letting go of things easier!



- [Craigslist.org](https://www.craigslist.org)
- [Freecycle.org](https://www.freecycle.org)
- [Goodwill.org](https://www.goodwill.org)
- [Salvationarmy.org](https://www.salvationarmy.org)
- [Earth911.com](https://www.earth911.com)
- [EcoHaul.com](https://www.ecohaul.com)
- Local schools, hospitals, libraries and non-profits

Pruning: Donation and disposal list

Item Description	Date Acquired	Original Cost	Donated To	Donation Date	Donation Value

Notes:

Pruning: Paper

IRS Retention Guidelines

- Publication 552 – Recordkeeping for Individuals
<http://www.irs.gov/publications/p552/index.html>
- Publication 583 – Recordkeeping for Businesses
<http://www.irs.gov/publications/p583/index.html>



NOTE: For financial questions, like what documents to keep for taxes, please consult with your tax preparer, financial advisor, bookkeeper, or the IRS. The items below are meant to be used as guidelines **ONLY**.

Sample Retention Guidelines

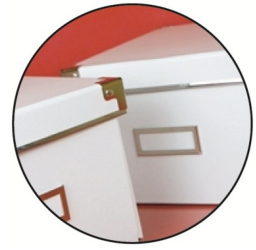
Document	Retention Guideline
Bank Account Info	3-7 years
Business Licenses	Keep current license
Consultants	Keep current consultant info; keep contact sheet of old consultants
Employees	Keep all info according to HR guidelines
Finances	3-7 years
Insurance	Keep current policy
Marketing	Keep until ideas have been implemented or discarded
Memberships	Keep current
Resources	Keep current resources; keep key old resources
Services	Keep current services; keep contact list of old services no longer used
Web Hosting	Keep all current hosting, domain, and contact info for host

Space: Your boundaries

What will be the physical boundaries around your work life and workspace?

Physical space – consider the following options

- Dedicated room in your home
- Dedicated space within another room
- Temporary but regularly used space within another room
- Dedicated office or workspace outside your home
- Shared office or workspace outside your home
- Coffee shop, library, or café that you work at regularly



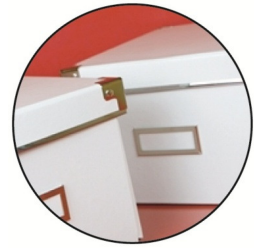
Where will your primary workspace be?

Why have you chosen that option instead of another option?

How will you clearly define the physical boundary of your workspace?

Space: Pruning

What items are you unsure about keeping or letting go of? Make note of them here, and set a deadline for getting rid of them.

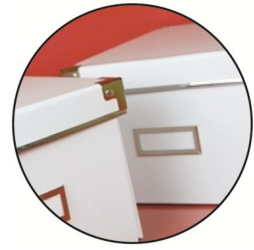


Item	Deadline

Notes:

Space: Sorting and Grouping

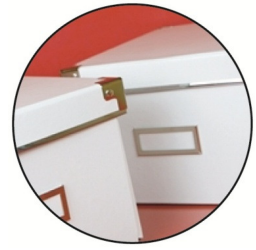
How much space will your items need to be stored effectively?



Group/Category	Square footage required for storage (+20%)	Storage Unit to Use
Binders		
Books		
Briefcase, Purse, or Backpack		
Computer Equipment		
Food, Snacks, and Water		
Inventory		
Office Supplies		
Paper and Files		
Tax Records		

Notes:

Space: Storage map



Storage unit name:

Shelf/drawer 1	
Shelf/drawer 2	
Shelf/drawer 3	
Shelf/drawer 4	

Storage unit name:

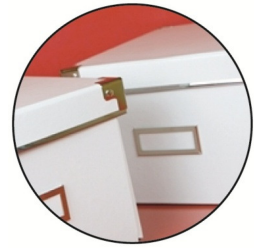
Shelf/drawer 1	
Shelf/drawer 2	
Shelf/drawer 3	
Shelf/drawer 4	

Storage unit name:

Shelf/drawer 1	
Shelf/drawer 2	
Shelf/drawer 3	
Shelf/drawer 4	

Notes:

Space: Sample storage map



Shelf/Drawer Area

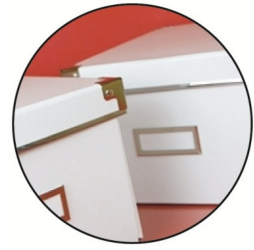
Shelf 1	Envelopes	Extra Reams of Paper
Shelf 2	Blank CDs	Audio/Video Tapes to Xfer (in containers) Checks
Shelf 3	Display Shelf (entire shelf)	
Shelf 4	Books (entire shelf)	
Shelf 5	Active Magazines Active Research	Books
Shelf 6	Baskets for: Frequently-used Items Work Related Semi-Travel Audio CDs	
Lower Drawer 1	Travel Items	Transcriber Software CDs (in binders)
Lower Drawer 2	Cables & Tech (in containers) Laptop (on top of containers)	

Desk Area:

Right of Desk:	Inbox
Under Desk:	Recycle/Garbage Bins
Under Monitor:	Copy Stand

Space: Prime real estate vs. below-market real estate

What are the items that you use every single day during the course of business?



-
-
-

Where can these be stored in your prime real estate?

-
-
-

What are the items that you use only once in awhile?

-
-
-

Where can these be stored in your below-market real estate?

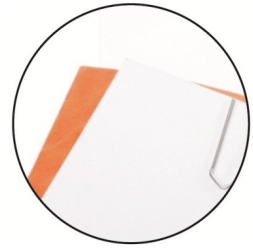
-
-
-

Notes:

Paper: The life cycle of paper

Yes, paper does have a life of its own! Here are the steps that a document goes through once it enters your world:

- **In** – paper/information comes in and gathers
- **Sort** – information is broken into separate areas
- **Process** – actions need to be taken on the information
- **Out** – Reference information needs to be archived, trash needs to be recycled, sensitive documents need to be shredded, mail needs to be sent, etc.





Note: You may have more, or fewer, categories for your own system.



- Active Projects
- (Add to) Address Book
- (Add to) Calendar
- (Add to) To-Do List
- Call
- Copy
- Coupons
- Discuss
- Email/Write
- Enter on Computer
- Events/Tickets
- Fax
- Lookup Online
- Mail/Stamps
- Pay
- Read
- Reconcile
- Scan
- Take to Office
- To File
- Upcoming Trips/Vacations

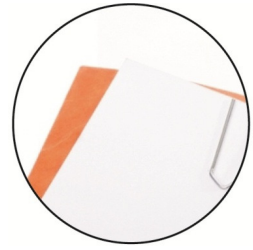
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CUSTOMLIVING
SOLUTIONS

Paper: Business Archive categories

Note: You may have more, or fewer, categories for your own system.



Sample Business Archive Categories

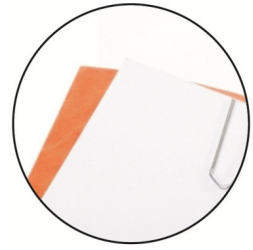
Your Business Archive Categories

- Bank Account Info
- Business Licenses
- Clients
- Consultants
- Education (Business)
- Employees
- Finances
- Ideas
- Insurance
- Leads
- Marketing
- Memberships
- Resources
- Services
- Suppliers
- Vendors
- Web Hosting

-

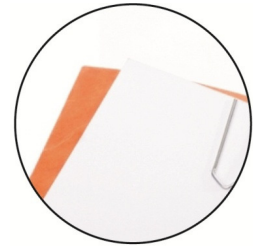
Paper: Retention guidelines

For retention ideas for your paper, please see the Pruning: Paper section of this workbook.



Paper: Receipt / financial sample categories

Note: You may have more, or fewer, categories for your own system.



Sample Financial Categories

- Tax Return
- W2/1099/Income Statements
- Bank/Credit Statements
 - Checking
 - Credit Cards
 - Savings
- Donations
- Investment Statements
- Mortgage Interest/Payments
- Property Taxes

Your Financial Categories

-
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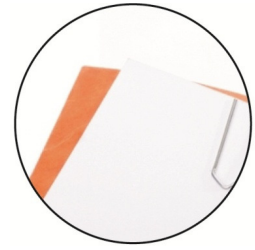
Business Expenses

- Advertising
- Auto - Mileage
- Books
- Calendar
- Computer
- Consultants
- Education/Seminars
- Equipment (Specialized)
- Furniture
- Gifts
- Insurance
- Meals/Entertainment
- Medical
- Memberships
- Phone
- Cell
- Landline
- Sales Tax (Board of Equal.)
- Subscriptions
- Supplies
- Transportation
- Travel
- Utilities – Bills

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Paper: Junk mail reduction resources

Here are some resources to write to if you'd like to receive less junk mail. Simply send them a form letter asking them to remove you from their mailing lists and to not share your name with other companies. Also, if you currently are receiving unwanted catalogs, call the toll-free number in the catalogs and ask to be taken off of their lists and the lists of their partners. It does take some time for the mailings to stop, so expect to be patient for a while. In time, you should see a significant reduction in the amount of junk mail you receive.



- www.stopjunkmail.org
- www.mailstopper.tonic.com
- www.catalogchoice.com
- Mail Preference Service
Direct Marketing Association
PO Box 9008
Farmingdale, NY 11735-9008
- National Demographics and Lifestyles
List Order Department
1621 18th Street, Suite 300
Denver, CO 80202
- RL Polk and Company
List Compilation and Development
6400 Monroe Blvd.
Taylor, MI 48180-1814
- Donnelley Marketing
Database Operations
1235 North Avenue
Nevada, IA 50201-1419
- MetroMail/Experian
List Maintenance
901 West Bond
Lincoln, NE 68521



Note: You may have more, or fewer, categories for your own system.



- Active Projects
- (Add to) Address Book
- (Add to) Calendar
- (Add to) To-Do List
- Call
- Copy
- Coupons
- Discuss
- Email/Write
- Enter on Computer
- Events/Tickets
- Fax
- Lookup Online
- Mail/Stamps
- Pay
- Read
- Reconcile
- Scan
- Take to Office
- To File
- Upcoming Trips/Vacations

- [illegible]



Note: You may have more, or fewer, categories for your own system.



Your Business Archive Categories

- Bank Account Info
- Business Licenses
- Clients
- Consultants
- Education (Business)
- Employees
- Finances
- Ideas
- Leads
- Marketing
- Memberships
- Resources
- Services
- Suppliers
- Vendors
- Web Hosting

-

Technology: Email – Filters or rules to create

List the senders, types of mail, subjects, or other topics that you'd like your email to automatically sort for you.



Sender/Subject/Topic of message	Action to take	Location of action
Sample: Amazon.com Updates	Move	Newsletter Folder

Notes:



Note: You may have more, or fewer, categories for your own system.



Your Business Archive Categories

- Bank Account Info
- Business Licenses
- Clients
- Consultants
- Education (Business)
- Employees
- Finances
- Ideas
- Leads
- Marketing
- Memberships
- Resources
- Services
- Suppliers
- Vendors
- Web Hosting

-

Technology: Electronic filing – naming conventions

Sample file naming convention:

YEAR-MONTH-DESCRIPTION-CREATOR's INITIALS-
VERSION.FORMAT



Examples:

2009-09-Program Meeting Agenda-JZ-v1.doc

2009-10-Site Facility Report-JZ-v2.xls

It's generally a good idea to put the year and date at the beginning so you can easily sort your documents and files.

When you create your own naming convention, you may want to have abbreviations for things like:

- Staff names or initials
- Common projects
- Site locations
- Technical terms or jargon
- Client names

Your file naming convention:

-

Your standard abbreviations:

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-

Technology: Scanning solutions

There are a number of scanning solutions available, including hardware that you buy so you can scan documents yourself, and services that you subscribe to who do the scanning for you. My preferred list:



Scanning hardware/software combination:

NeatDesk

www.bit.ly/cls-neat



Scanning service:

Pixily

www.bit.ly/cls-pixily



Technology: Data backup and synchronization

If you have any important data on your computer(s) at all, it's ESSENTIAL that you back up regularly. These tools and services make it easy!

Online backup service:

MozyHome

www.bit.ly/cls-mozy



Multi-computer backup and synchronization:

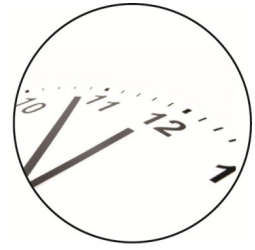
DropBox

<http://bit.ly/cls-dropbox1>



Time: Your time container

What will your “working hours” be?



Days per week you want to work:

Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday

Daily close time:

Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday

Daily open time:

Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday

Total number of hours worked per day:

Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday

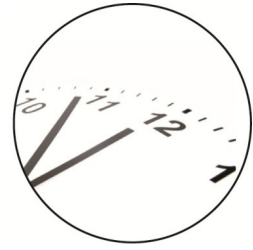
Total number of hours worked per week in or on your business:

The days per week and daily hours are the container for your schedule.

Notes:

Time: Time blocks

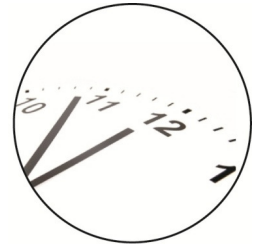
Sample blocked schedule:



Calendar					
October 02 - October 06					
	Monday, Oct 02	Tuesday, Oct 03	Wednesday, Oct 04	Thursday, Oct 05	Friday, Oct 06
7 ^{am}					
8 ⁰⁰					
9 ⁰⁰	Admin Time	Admin Time	Admin	Admin Time	Admin Time
10 ⁰⁰	Production Time	Production Time	Weekly Staff Meeting	Production Time	Production Time
11 ⁰⁰			Production Time		
12 ^{pm}	Lunch Break	Lunch Break	Lunch Break	Lunch Break	Lunch Break
1 ⁰⁰	Admin Time	Admin Time	Admin Time	Admin Time	Admin Time
2 ⁰⁰	Production Time	Production Time	Production Time	Production Time	Production Time
3 ⁰⁰	3:00pm-3:15pm Break	3:00pm-3:15pm Break	3:00pm-3:15pm Break	3:00pm-3:15pm Break	3:00pm-3:15pm Break
4 ⁰⁰	Production Time	Production Time	Production Time	Production Time	Production Time
5 ⁰⁰	Admin Time	Admin Time	Admin Time	Admin Time	Admin Time
6 ⁰⁰					
7 ⁰⁰					

Time: Time blocks

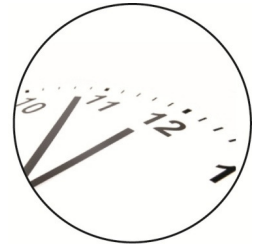
Enter your time blocks (Production, Marketing, Admin, and Breaks) in the sample calendar below.



	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday
8 am							
9 am							
10 am							
11am							
12 pm							
1 pm							
2 pm							
3 pm							
4 pm							
5 pm							
6 pm							

Notes:

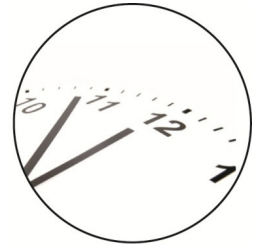
Time: Prioritizing tasks and to-do's –
The 1-2-3-D System



Priority (1, 2, 3)	Delegate? (D)	Task Name/Type	Estimated Duration

Time: Fighting procrastination

What will your strategies be for fighting procrastination? Here are a few ideas to get you started:



- Keep the goal of the task in mind
- Reward yourself for finishing the tasks
- Set a time limit for finishing the tasks – use a timer
- Group all the tasks you don't want to do and finish them all at once

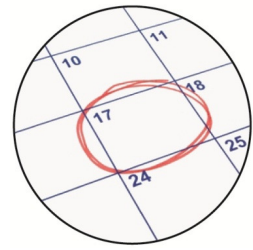
Write your own procrastination-busting techniques below. When you feel yourself procrastinating, revisit this list and implement one or more of the strategies to get you moving again.

-
-
-
-
-

Maintenance: Maintenance quick tips

Planning

- Keep a running list of future organizing and productivity projects
- Review future projects monthly to determine when they can be scheduled



Space

- Putting things away right away
- Set aside 15 minutes a day to clean up clutter
- Prune your belongings every 6 months

Paper

- Create files immediately as needed
- Keep filing supplies close to your desk
- Schedule paper processing time
- Prune your documents every 6 months

Technology

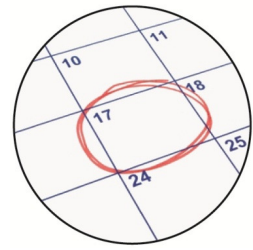
- Back up your documents regularly
- Perform system updates regularly
- Review computer-based contact list quarterly
- Prune electronic files and emails every 6 months

Time

- Keep your master to-do list close by
- Review schedules daily and adjust as needed
- Look for an ever-increasing number of tasks to delegate

Maintenance: Tailoring systems to you - ideas

There are many ways to tailor systems to meet your needs. Here are a few ideas:



Planning

- Adjust the scheduling of your projects when you get busy
- Shift the priority order of your projects as your needs change

Space

- Move the location of items in your storage
- Add/remove storage as needed

Paper

- Recategorize/rename files
- Change the physical location of files
- Use horizontal paper management tools instead of vertical ones – or vice versa

Technology

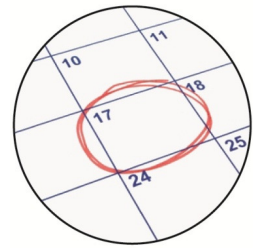
- Adjust your unread email threshold
- Increase or decrease the amount of time spent on e-filing or email
- Revisit scanning (whether a service or a product)

Time

- Evaluate your time estimating skills
- Adjust time blocks or shift them on your schedule
- Revisit and adjust priorities

Maintenance: Tailoring systems to you – your choices

What systems would you like to modify, and how?



Planning

-
-
-

Space

-
-
-

Paper

-
-
-

Technology

-
-
-

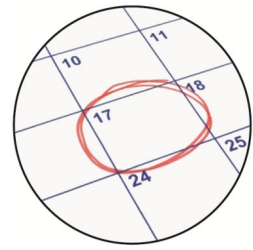
Time

-
-
-

Maintenance: Productivity success strategies

Organizing buddy

Having another person to partner with on the organizing and productivity process can really help you get motivated and stay on track. Who can be your organizing buddy? Name three people below:



1.

2.

3.

Scheduling organizing time

When are you going to block out time to get organized? Remember, when you actually schedule time to work on your organizing projects and your ongoing maintenance, you're much more likely to actually make real progress.

My regular organizing and productivity success time block is at:

•

And if I don't get to it at that time, I'll do it instead during my back-up time, which is at:

•

Action Plan

This first page of the Action Plan lists your major projects, in the order in which you plan on accomplishing them.

List of Projects/Rooms

☐ 1.

☐ 2.

☐ 3.

☐ 4.

☐ 5.

☐ 6.

☐ 7.

☐ 8.

☐ 9.

☐ 10.

Notes:

Action Plan - Details

This second page of the Action Plan lists the details for each of the projects, rooms, or systems that you've identified on the first page of the Action Plan. You should create a copy of the Action Plan – Details page for each of the rooms/projects/systems that you are going to organize, and fill out each of the sections below accordingly.

Project/Room:

To Prune (items to weed through):

<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

To Sort (items to group into categories):

<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

To Buy (supplies to purchase):

<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

To Move (items to move to specific places):

<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

To Do (sub-projects, things to create, research, etc.):

<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Notes:

About the author

Joshua Zerkel is a Certified Professional Organizer® and is the President of the San Francisco Bay Area Chapter of the National Association of Professional Organizers. He is also the founder of Custom Living Solutions, a productivity and organizing consulting firm based in San Francisco. Josh specializes in helping entrepreneurs and small businesses find easy ways to get control of their information, time, technology, and clutter so they can reduce stress and make more money. He also specializes in working with men. Although he doesn't consider himself freakishly organized, Josh does admit to spending his free time alphabetizing his comic books and fixing the tags on his MP3 collection.



Josh has been featured in various media, including CBS News, ABC News, the LiveWell HD Network, The San Francisco Chronicle and Examiner, Organize Magazine, OnlineOrganizing.com, and many others. He's also a columnist on the FranklinCovey website and co-hosts the "Thrive Solutions" radio show on Thrive in Balance radio. Josh is a popular organizing instructor in the San Francisco business and entrepreneurial community, speaking at companies large and small about the different techniques they can use to optimize efficiency and productivity in their work environments so they can serve more clients and boost their bottom line.

You can learn more about Josh and Custom Living Solutions at www.customlivingsolutions.com.

Member

National Association of Professional Organizers (NAPO)
President, San Francisco Bay Area Chapter (NAPO-SFBA) - 2009-2010

Subscriber

National Study Group on Chronic Disorganization (NSGCD)

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Notes: