The Simplified Life Organizing System

Joshua Zerkel, Certified Professional Organizer®

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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
- Reduce clutter
- Eliminate overwhelm
- Find things when you need them
- Enjoy your home more
- Create better storage

What is prompting you to get organized now, instead of at some point in the past or the future? What benefit will you get from getting your home organized?

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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? How will a space feel differently to you than it does now?

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Planning: What are your biggest organizing and productivity challenges?

Consider the various modules in the Simplified Life Organizing System: Planning, Editing, Space, Paper, Time, Technology, and Maintenance.

My top organizing challenges are:

1.

2.

3.

4.

5.

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For each of these challenges, please describe how they are affecting you. For instance, a challenge could be affecting your level of stress, could result in lost money due to paying bills late, or fights in your household.

1. How is challenge #1 affecting you?

2. How is challenge #2 affecting you?

3. How is challenge #3 affecting you?

4. How is challenge #2 affecting you?

5. How is challenge #3 affecting you?

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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 family or friends that can help you with your projects and/or implementing and maintaining systems?

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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

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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

☐

☐

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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 Edit (items to weed through):

☐　　　　　☐　　　　　☐

☐　　　　　☐　　　　　☐

To Sort (items to group into categories):

☐　　　　　☐　　　　　☐

☐　　　　　☐　　　　　☐

To Buy (supplies to purchase):

☐　　　　　☐　　　　　☐

☐　　　　　☐　　　　　☐

To Move (items to move to specific places):

☐　　　　　☐　　　　　☐

☐　　　　　☐　　　　　☐

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

☐　　　　　☐　　　　　☐

☐　　　　　☐　　　　　☐

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Editing: Keeping what's useful or important

Helpful questions to ask during the editing 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?

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Editing: 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

- Freecycle.org

- Goodwill.org

- Salvationarmy.org

- Earth911.com

- EcoHaul.com

- Local schools, hospitals, libraries and non-profits

- Donation parties or swap events

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Editing: Donation and disposal list

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

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Editing: Paper

IRS Retention Guidelines

- Publication 552 – Recordkeeping for Individuals
  http://www.irs.gov/publications/p552/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
Finances	3-7 years
Household Info	Keep title/mortgage info for 10 years after sale of property
Insurance	Keep current policy
Memberships	Keep current membership policies
Services	Keep current services; keep contact list of old services no longer used

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Editing: Computer files

Duplicate File Finders

Auslogics (PC)

easyDuplicateFinder (Mac)

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Editing: Purgatory

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

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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
Books		
Briefcase, Purse, or Backpack		
Clothes		
Electronics		
Food, Snacks, and Water		
Games and Toys		
Paper and Files		
Tax Records		

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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	

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Space: Sample storage map

Living Room Cabinet

Shelf 1	Blanket	Pillows for Guests
Shelf 2	Audio/Video Tapes (in containers)	
Shelf 3	DVDs	
Shelf 4	DVDs	
Shelf 5	Video Games	
Shelf 6	Video Games	
Lower Drawer 1	Video Game Controllers	
Lower Drawer 2	Extra Remote Controls Extra Cables	

Coffee Table

Left Drawer	Magazines
Middle Drawer	Remote Controls
Right Drawer	TV Guide

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

What are the items that you use every single day?

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Where can these be stored in your prime real estate?

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

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

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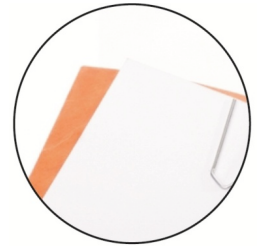
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Paper: The life cycle of paper

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.

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Paper: Hot Files categories

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

Sample Hot Files Categories   **Your Hot Files Categories**

- 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
- School
- Sign
- Take to Office
- To File
- Upcoming Trips/Vacations

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Paper: Archive categories

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

Sample Personal Archive Categories

Art
Auto
       Loan/Lease Agreement
       Monthly Stubs
       Registration & Title
       Repair & Maintenance
Bank & Credit Card Account Info
Children
Church/Temple
Computer Info
Credit Reports
Death Info (for others)
Diet/Health
Education
Employment History
Entertainment/Fun
Family Records
Favorite Quotes
Gift Ideas
Hobbies
Holiday Decorating Ideas & Info
Home
       Design/Décor
       HOA
       Home Inventory
       Lease/Title
       Maintenance
       Mortgage
       Purchase Info
       Property Taxes
Ideas
Insurance
       Auto
       Disability
       Homeowners/Renters
       Life

Investments
Jury Duty
Legal
Maps
Medical History
Memberships
Pay Stubs
Personal
       Birth Certificate
       PIN Numbers & Passwords
       Passport
       Social Security Info
Pets
Product Manuals & Warranties
Property (other than Home)
Reading File
Recipes
Resumes
Retirement Info/Possibilities
Safe Deposit Box Inventory
Sentimental
Services/Consultants
Student Loans
Subscriptions
Tax Returns (Past Years)
Travel Ideas & Info
Utilities – General Info
       Cable/Satellite
       Cell
       Garbage
       Landline
       Power
       Water
Wedding
Will/Trust

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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
    - o Checking
    - o Credit Cards
    - o Savings
- Donations
- Investment Statements
- Mortgage Interest/Payments
- Property Taxes
- Purchases (Major)
- Travel
- Utilities – Bills

Your Financial Categories

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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.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

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Technology

You can always access the most current list of tech tools, apps and services by going to www.customlivingsolutions.com and clicking on "Productivity Toolbox."

Shared Calendars

- www.google.com/calendar

- www.calendar.yahoo.com

- www.jibidee.com

Document Sharing

- www.dropbox.com

- www.google.com/docs

- www.officelive.com

Media Sharing

- http://iomega.com/nas/home-network-storage.html

- http://www.apple.com/appletv/

- http://www.sonos.com/

Cable Management

- www.bluelounge.com

- www.cable-safe.com

- http://www.cocooninnovations.com/grid.php

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 services:

OfficeDrop (for documents)
www.officedrop.com

Shoeboxed (for receipts and business cards)
www.bit.ly/cls-shoeboxed

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Technology: Data backup

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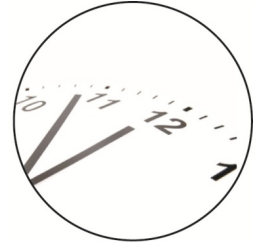
Online backup services:

CrashPlan
http://www.crashplan.com/

MozyHome
www.bit.ly/cls-mozy

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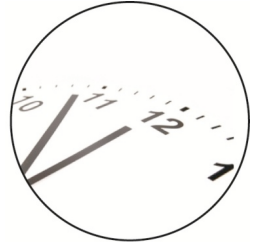
Time: Your time container

The 1-2-3-S System

Priority (1, 2, 3)	Share? (S)	Task Name/Type	Estimated Duration

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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

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.

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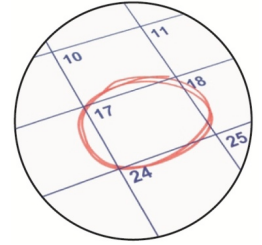
Maintenance: Maintenance quick tips

Planning

- Keep a running list of future organizing projects
- Review future projects monthly to determine when they can be scheduled
- Create new Action Plans as new projects come up

Editing

- Regular editing every month/quarter/6 months
- Central donation bin
- One in / two out rule

Space

- Get your family in the habit of putting things away immediately after use
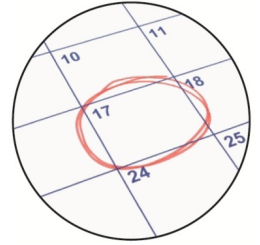- Set aside 15 minutes a day to clean up clutter

Paper

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

Technology

- Back up your documents regularly
- Perform system updates regularly
- Edit electronic files and emails every 6 months

Time

- Review your 123S list and move items to your calendar as needed
- Review shared calendars
- Look for an ever-increasing number of tasks to share

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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
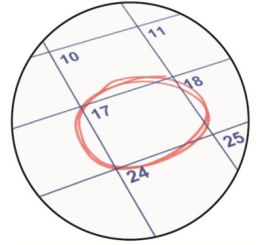- Move frequently used items to the front of your file drawers
- Add color coding if it's helpful

Technology

- Do a regular "tech review" and dispose of outdated or unneeded tech
- Look for apps and services to solve problems that you're having

Time

- Choose different calendaring tools
- Schedule new or regular blocks of time to continue your organizing process

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Maintenance: Tailoring systems to you – your choices

What systems would you like to modify, and how?

Planning

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-

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Space

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Paper
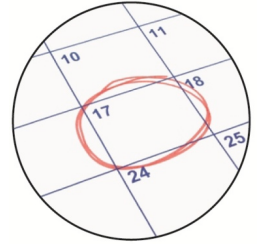
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Technology

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Time

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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 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:
-

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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.

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Action Plan - Details

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Project/Room:

To Edit (items to weed through):

☐   ☐   ☐

☐   ☐   ☐

To Sort (items to group into categories):

☐   ☐   ☐

☐   ☐   ☐

To Buy (supplies to purchase):

☐   ☐   ☐

☐   ☐   ☐

To Move (items to move to specific places):

☐   ☐   ☐

☐   ☐   ☐

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

☐   ☐   ☐

☐   ☐   ☐

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About the author

Joshua Zerkel is a Certified Professional Organizer ® and was the 2008-2010 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.

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

Subscriber
National Study Group on Chronic Disorganization (NSGCD)

Organizer of the Month
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Organize Magazine

Featured Blogger and Columnist
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OrganizingConnection.com
OnlineOrganizing.com
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