

# A Short Guide on Simple Organizing

# The goal for this presentation is to:

- spread my organizational skills to others who want to simplify their lives by de-cluttering
- demonstrate my expertise as a Professional Organizer
- gain recognition as a Professional Organizer

# The goal for this presentation is to:

- gain knowledge about different organizational techniques
- how to apply these techniques for individuals, homes and businesses in your area.

# What is a Professional Organizer?

- refers to anyone that aids individuals, homes and businesses create systems that use organizing techniques and skills.
- main objective is to help keep his/her environment, time, paper management under control by creating customized organizing plans of action; also to teach organizing skills.

# What is a Professional Organizer?

-professional organizers provide a variation of services, ranging from creating a functional closet to organizing a kitchen.

-some organizers specialize in residential spaces, such as kitchens, closets, and even garages; there are others who rather work in offices.

# Organizing Your Planning

Before you take on any task, regardless of what it is, there should always be some thought put into it prior to executing it. This is referred to as the planning process.

This planning process is also applies to the professional organizing industry. Here are a few valuable ideas:

- Focus on your most difficult task during the time you get the least interruptions. (Trust me this will prevent confusion and frustration).

# Organizing Your Planning

- Write an agenda for meetings and teleconferences or put these on an electronic device. This should be done prior to making phone calls; you will not forget important points.
- Create a checklist for frequent activities.
- Spend several minutes during the end of the day planning for the next day.

# Organizing Your Planning

- Keep a record or schedule follow-up calls of what you have planned so it does not interfere with other activities
- Be persistent about the response you need when sending a message to your fellow colleagues. They can really give a detailed response, even if they don't reach you from a direct perspective.



# Time Management

This is an area in which many people as well as businesses struggle with--managing their time.

In terms of time management, there are many things to consider:

- Get your priorities in order; in other words, focus on the most important things first.

# Time Management

- Set goals with your times and schedule activities in your planner, or in an electronic device.
- No one is perfect; as a result, do not focus too much time on activities that do not have that much priority.
- The last thing that you want to do is to procrastinate; break your tasks into smaller pieces--they will be much simpler to tackle.

# Time Management

- Use a planner to schedule appointments and projects. It can be anything from a typical spiral-coiled notebook to a computer software program, or even a mobile device.
- Spend at least a couple of hours of undivided time a day tackling tasks and action items.
- Allow twice as much time for a task as you think it will take. This reduces interruption and allows you to stay focused on the target project(s).

# Time Management

-Break down the larger projects into small, sequential steps. Make these steps become part of your day with your planner.

# Office Organizing Ideas

Having a huge problem with keeping papers under control in your office? You are not alone! In fact, many offices are facing this dilemma, due to their busy workday.

The first thing that you want to do in terms of organizing your office is to tackle the filing issue:

- Create a filing system for your electronic documents identical to your regular paper documents on a regular basis.

# Office Organizing Ideas

- Keep a file index, which is the main list of file names. Check the index prior to making a new file. This prevents you from creating duplicates. Use these when deciding where to place these new documents.
- Check your company's records retention plan for guidelines on the duration of holding on to the documents.

# Office Organizing Ideas

-Keep the most current papers in front of the files. When you are ready to open it, the current information will be in the front or on top.

## How to Organize File Cabinets

There are a few steps for file cabinet organization:

# Office Organizing Ideas

## Step#1: Mail Sorting

- Decide on a location for all mail to go to other people, whether in a house or an office. You can get an inbox, wall holder or a mail slot and divide it into different categories.
- Create a pile for recycling and garbage. Place them in their proper bins.



# Office Organizing Ideas

-Create a pile for every category, as in file, read, and respond. Assign a location to keep these categories. This will become your action files.

## Step#2: Which Files to Keep or to Toss Out?

Files to keep:

- birth/death certificates
- health records

# Office Organizing Ideas

- Insurance policies-keep the current year
- Mortgage loans-at least three year after paid off
- Passports
- Deeds
- Warranties
- Stock/Bond Certificates
- Tax records-keep up to seven years
- Will (Living will)

# Office Organizing Ideas

- Citizenship papers

- Investment statements-keep monthly, then toss out after yearly one

Files to Toss Out:

- ATM records-after posted for the month

- Bank/Credit card statements-after one year unless you itemize.

# Office Organizing Ideas

- Receipts for bills-after one month, discard unless needed for warranty.

Documents that Should Have a Safety Deposit Box:

- Birth, marriage, and death certificate
- Divorce certificate
- Custody papers
- Adoption papers

# Office Organizing Ideas

- Citizenship papers
- Military papers
- Trust, living will, power of attorney
- Savings bonds
- Photos/CD discs
- Valuables
- Stocks and bonds
- Videotapes of valuables

# Office Organizing Ideas

Should I File or Should I Toss?

-Decide on which papers you would keep in a standard file system and which papers would you place in a binder. If you are going to organize your file cabinet, there are some papers that would be suitable for a binder that can travel throughout the house or office.

What are action files/reference files?

# Office Organizing Ideas

As I mentioned earlier in the guide, action files refer to files that should be read and responded to immediately, such as bill and correspondences.

In contrast, reference files are files that are usually archived such as:

- Financials** (bank accounts, mortgage, credit card accounts, etc.)

# Office Organizing Ideas

- Insurance** (auto, homeowners/renters insurance, etc.)
- Property** (home improvement repairs, etc.)
- Furniture** (appliances, office items, etc.)
- Certificates** (birth, marriage, etc.)
- Utilities** (gas, water, telephone, cable/satellite, cell phones, etc.)
- Medical information** (medical history, insurance forms, etc.)
- Tax records** (income tax stubs, interest/dividend statements, etc.)



# Declutter the Workstation

Here are ways to declutter that lovely workstation to make it functional:

- Keep only supplies you need everyday on your desk.
- Get rid of the sticky notes that are stuck on your monitor and paper printouts or attached to your desk. If these include important information, have them either digitally or put into a binder.

# Declutter the Workstation

- If you have a bulletin board that resembles a shrine, get rid of everything and only place a couple of items on it.
- Go digital if that is possible. This will lessen the paper clutter that is plaguing your life.
- Get rid of catalogs, phone books, papers and other items you no longer need or use. You want to ask yourself: who else own this? Is this available in digital form?

# Declutter the Workstation

- Instead of having a few photo frames, just invest in a single digital frame where it displays a slideshow.
- If you don't use supplies, as in tape or staple, then put them away in your desk drawer.
- Have just one pencil cup on your desk for a few pens and markers. Extra writing supplies should be placed in your desk drawer or in the supply storage room.

# Declutter the Workstation

- Prevent stashing things under your desk. Leg room is essential. Holding items under your desk collects dust and vermin is a possibility.
- Put everything in its proper location at the end of the day.

# Ideas for Organizing Your Email

When we think about our emails, we just think about opening them, reading them, and deleting them--that's it! Of course, it has to have some type of an organizational system, just like the traditional mail--sorting it.

As with traditional mail, the same rules apply for email. The following are some helpful tips for organizing those cumbersome, yet important emails:

# Ideas for Organizing Your Email

- Arrange a specific time during the day to check and monitor your email.
- Set aside at least a couple of hours of non-email time during the workday (or any off day).
- File the email that is of importance to keep in folders. Do not leave it in the inbox if you have already responded to them.

# Ideas for Organizing Your Email

- Make use of a subject line which represents what the email is about. It makes it much simpler to file.
- Avoid printing email unless it is really necessary.

# Miscellaneous Organizing Tips

## What's in Your Kitchen?

Planning to prepare a dinner tonight for your 30 hungry guests? There is one problem: the entire kitchen is big mess--the pots are everywhere, the utensils are in the cupboard; there are kitchen utensils in the most unusual locations! What do you do in a situation like that? Become more confused, right? Right! There is some good news: your kitchen can be helped with decluttering. You can organize and declutter with these wonderful and useful ideas:



# Miscellaneous Organizing Tips

- Keep the countertops clear as humanly possible.
- Use a portable island, hinged counter on the wall or a huge cutting board across the sink. This makes more space.
- It is best to hang up pots and pans from grids on walls, or even from the ceiling.

# Miscellaneous Organizing Tips

- Separate items in bulk packaging for much simpler storage.
- Consider putting things in drawers that you had normally placed on shelves and vice versa, as in plastic food storage containers.
- Keep the items that you use the most within a reasonable reach.

# Miscellaneous Organizing Tips

## Is There is a Jungle in Your Purse?

Most of us, women, carry a purse with us when we are going from point A to point B. It is often said that our purses reflect on who we are--inside and out.

Unfortunately, the inside of many of our purses reveal the ugly truth--disorganization. Makeup is everywhere, having a hard time getting those keys from the bottom of the purse and also getting that ringing cell phone from under your Kleenex in the purse. Ladies, there is hope for this claustrophobic feeling inside your purse:

# Miscellaneous Organizing Tips

- Your purse is not nearly as big as a luggage. Carry only the daily necessities.
- Group like-materials and put them in containers and ziploc bags, such as makeup or put them in the zippered pockets in your purse.
- Keep items as in keys, business cards, and work ID in an accessible location in your purse.

# Miscellaneous Organizing Tips

## Kick The Clutter!

Did you know that clutter brings about all types of confusion? Of course, it can! It can cause everything from stress to just a plain headache! Here's a cure for those clutter blues:

- Pick one area that really causing you much headache and begin organizing it first.

# Miscellaneous Organizing Tips

- Choose a designated location for every item you want to store. If you cannot find a place for it, then maybe it is time to toss it out.
- Store the items you use on a regular basis in the most easily accessible location(s).
- Put things back where they belong immediately. Don't "set it there for the time being." We know what that can lead to!

# Miscellaneous Organizing Tips

-If you have not used something in a while, chances are that you should discard it.

# Summary

According to NAPO, or National Association of Professional Organizers, the organizing industry is in very high demand. As individuals are packing on more items and work more hours, they are having less time to cope with their possessions.

The professional organizer's job is to increase space, reduce clutter and stress, boost more productivity for their client. However, it is the client's responsibility to stay on top of things in terms of their newly organized life.



# Summary

This is where these simple organizing tips comes in, regardless of your organizational needs and desires.

The bottom line: organize your paperwork (or anything else that needs organizing) on a daily basis and prevent it from turning into a trail from the start. If you are consistent with these simple organizing tips, then you will be on your way to declutter heaven!

# Recommended Readings

There are many reading resources on professional organizing and its tips surfacing on the Internet, these are my top picks to check out (these are mainly blogs on professional organizing):

[Org Junkie](#)

[Organized Bloggers](#)

[Organized by Tina Rochelle](#) (my professional organizing website)