

# ORGANIZE YOUR LIFE!



## IN THIS ISSUE, WE WILL DISCUSS:

FULFILL YOUR NEW YEAR'S RESOLUTIONS

FILING - SOLUTIONS TO STOP DESPISING THIS COMMON TASK

CHOOSING A PROFESSIONAL ORGANIZER



## FULFILL YOUR NEW YEAR'S RESOLUTIONS

What do you want to get done and who are you going to get it done with?

You have promised yourself for the year of 2005 that you are going to organize your basement once and for all. Yet, you find every single time you go downstairs to get started you feel overwhelmed and hopeless. You pick up your old prom dress or tux and think, "That was such a great night, I can't get rid of this, I will just put it over here on the maybe pile." Then you find a box full of old papers from school and start looking through it. An hour later you have reread your essay on existentialism and have accomplished nothing in the basement. All of sudden you have an urge to make popcorn and discover you are thirsty for a Coke, which you have to go get at the store immediately. You go upstairs pick up your coat and cannot find your keys. A half hour later you are on your way to get popcorn (you realized you have none) and Coke. The basement remains a disorganized mess, with a new pile of maybes that get mixed up with the rest of the disorganization. You obviously need some assistance creating a plan of action and a buddy to keep you focused.

An outside viewpoint is the key. The fresh perspective on things can help you shake out of your rut and help you get your project moving. Do you have someone that can come and help you put together a plan of action? If not, can they help you actually do the moving of objects and reorganizing? Maybe all you need is a Professional Organizer to come and do a

consultation with you and give you a plan of action, but you can do the work yourself. My company offers this for free, and most professional organizers have something similar—a few hundred dollars for an estimate and some pointers to get you moving in the right direction.

A good way to determine this is to write up a simple plan of action yourself, consisting of exactly what you need to do, step-by-step. Go down right now and try this. If you find yourself distracted and tormented about throwing the papers away, you need more than a plan of action, you may need a professional organizer's guidance and counseling along the way. Does that mean they will do the work for you? That's up to you: some organizers are full-service-only, but most are delighted to consult with you for a smaller number of hours. You do the work, while they help keep you focused and on track. This is a great way to save on cost while still getting the project done successfully.

Personally, I leave all of my quarterly taxes to my accountant. I don't want her help or her guidance, I just want her to do them! That's because I loath doing my taxes, and get overwhelmed by the process. If that's you, then absolutely hire your professional organizer to just do the whole thing for you.



# FILING - SOLUTIONS TO STOP DESPISING THIS COMMON TASK

I was beginning a project with a new client. As I started digging in to the piles of paper, my client muttered, “I hate filing!” Now, this is a common sentiment among my clients. However, I find that the reasons for this are often different, and I can help people better if I understand their concerns. So I asked her, “Is it the act of physically putting files into their correct folders that you hate?” She told me that it wasn’t the physical act of filing she hated. What she hated was determining:

1. Where should I put the paper?
2. Should I keep the paper?
3. Is it ok to file a single piece of paper in a file folder, or should each folder hold multiple papers?
4. Will I find it again if I put it away?
5. What do I do with things I need to work on right now?
6. What should I name the file folder?

This was great news. All these problems can be solved with a good filing system, and they only need to be solved once! Once she had these questions answered, she would be able to keep this system up with no stress since the miserable part was out of the way. The important point here was that if she just started organizing, she would be miserable. If she had an organizational system designed before she started, she would be happy and successful.

If you don’t have a professional organizer to help you design your organizing system, these six questions are a great place to start. I’ll go through each one. Please note that I have as many organizational systems as I have clients, so for this exercise, I’m going to have to make some assumptions. The system that works best for you may be very different!

## **1. Where should I put the paper?**

There are just three questions you need to ask yourself when determining where to put a piece of paper:

1. What is this for?
2. Is there something you need to do with this paper, or do you just need to keep it for reference?
3. Do you have to keep it for legal reasons, or can you throw it away?

Let’s say it is a page from your will. First, establish which category it fits in to. You may call it “legal” or “family”, for example, depending on the categories you picked. Don’t sweat it if it fits into multiple categories—just file it where you think it fits best. Now, where does it go? If there’s something you need to do with this paper, such as review it, it needs to go in a “to-do” area. This can be a special file, a box on your desk, or any number of other short-term storage places. Your short-term file doesn’t need to have folders for every category; you can just put things there that need attention.

If you are holding on to it for reference, for example if you are waiting for your spouse to finish editing it before you send it back to the lawyer, then you file it in a “middle place”—a convenient file cabinet in a closet, for example. This will have files from every category in it.

If you are holding on to it for a long time for legal reasons, then it should go in an archive space. This might be anything from a fireproof safe in a closet to a safety deposit box.

Finally, if it’s an outdated draft, there’s no reason to keep it. Keep a good shredder around and use it to dispose of files like this. Remember, shredded paper is usually recyclable, so there’s no reason not to shred!



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## **2. Should I keep the paper?**

This is a hard question for many people. The paper might be sentimental. You may have a deep-seated fear of throwing things away. You may be concerned that you'll need the paper again. You may be unsure if the government requires you to keep the paper or not.

The last question is easiest. Your local Secretary of State's office probably has a detailed document answering exactly this question. For example, in Washington state, you can visit:

<http://www.secstate.wa.gov/archives/gs.aspx> to find out what needs to be kept.

For sentimental papers, dedicate one moderately-sized container. Use this for things like your child's certificate for graduating kindergarten. Once it fills up, you have to toss something before you put something else in.

If you have a fear you may need it again, go through all of the reasons you may need it again. If you come up with some rational explanations, like "I am planning on teaching a course on interviewing. I will create a file for all documents related to interviewing so that when I teach this course again I can pull this file." If you come up with a reason like, "I may teach a course on this again, but probably not." Toss it! You can always find the information again later. Chances are the information you are keeping is outdated anyway. Don't keep things "just in case". If you have a real reason for keeping something do so. If not, get rid of it!

Finally, if you are afraid of getting rid of things but can't quite explain to yourself why, you should do some soul-searching. I've had clients who collect old papers, office supplies, tinfoil—just about everything. If your "keep-arounds" are getting in the way of your life, working with a professional organizer can work wonders. If the problem is severe, many psychologists can help to address the root causes. But many people just get stuck in a rut of "keeping", and only need a little help to get them out of the bad habit.

## **3. Is it ok to file a single piece of paper in a file folder, or should it be put with other papers?**

If you are a visual person, there is nothing wrong with keeping one piece of paper in a file folder. The only problem with this course of action is that you may find you have so many file folders that you have run out of

space. If this occurs, you may be keeping too much and may need to do a re-purging, or you may want to merge some categories together so you have more papers per folder.

## **4. Will I find it again if I put it away?**

This is a common fear and an understandable one. If you are making up your organizational system as you go along, there's a good chance you'll forget it and your papers will be lost! This is why it's so important to lay out your organizational system before you start. Another great way to reassure yourself that you can find a file folder again is to create a document which lists all of your files and their locations. There is also software called Paper Tiger (<http://www.thepapertiger.com>) that tracks it in a database, but it requires a lot of time and expertise to set up—consider working with a professional organizer if you're interested in using it.

## **5. What do I do with things I need to work on right now?**

When I talked about the question where do I put the paper, I briefly mentioned storing action items in a special place. There are a variety of ways to organize tasks that need your attention right away. Below are links where you can purchase such tools:

Color coded files for tracking urgent items:

<http://tinyurl.com/3ttdn>

If you want to get really fancy, you can put your "immediate attention" tasks under red, "in process" files under yellow, "bills to pay" under green and "personal letters" under blue.

Daily and monthly "tickler" system:

<http://tinyurl.com/47rgb>

To create an active folder system that can be on your desk top or under your desk:

<http://tinyurl.com/67fw5>

Be sure to purchase hanging file folders and manila folders that fit in this unit.

## **6. What should I name the file folder?**

It's easy to get in a kerfluffle and make this very difficult on yourself. Don't think too hard about it. When you are making files, remember you are making them for you to use. If you use the first title that pops into your head, it's likely that you'll think of it easily again later. If you create a document that records all of your files be sure to put a short description of the file in parentheses, and you'll have no trouble figuring out what it's for.

# CHOOSING A PROFESSIONAL ORGANIZER

Choosing a professional organizer is difficult, and it doesn't always work out. Roughly one in four Personworks customers come to us after having used another professional organizer and being unsatisfied with the results. How can you choose a professional organizer that will work well with you? Here is a simple checklist that may help you narrow down the field.

## **Get a consultation in person.**

It's very difficult to judge a project over the phone. If the project winds up being more difficult than expected, your organizer may have to do a "rush job" to finish it all, or you may wind up paying more than you expected to have it done right. If the project is less difficult than expected, you'll pay more than you needed to.

Also, it's very important that you get along well with your organizer. This is difficult to judge over the phone. If someone makes you feel defensive, embarrassed, or just plain uncomfortable, your project probably won't work out.

Some professional organizers will come to your home or office in person, at no charge, to give you a quote. If they won't do that, spend the extra money and pay them for a short consultation session. It's cheaper than hiring the wrong person!

## **Find out who's doing the work.**

You may have the company president take your call, a full time professional organizer do the evaluation, and a part-time contractor do the actual work. Make sure you know what you're getting, and make sure that you meet them in person before you sign any checks.

## **Go with NAPO** ( <http://www.napo.net> ).

The National Organization of Professional Organizers has been around for 20 years. They're not out to make a profit; they exist only to advance the organizing profession. Most reputable organizers are members.

## **Check references.**

Call at least three references and ask them:

- Did everything get done on time, the way you expected?
- Has the system continued to work for you?
- How long ago was the work done?

An active professional organizer should be able to give you references from clients they just finished working with, as well as satisfied clients who have been benefiting from their work for years.

## **Get the cost in writing.**

Memories have a strange tendency to fail when checkbooks are involved. Was that a down payment or the total payment? Does the work end after four hours, or after the project is done? Make sure that you have a signed agreement that describes what you're getting and how much you're paying for it.

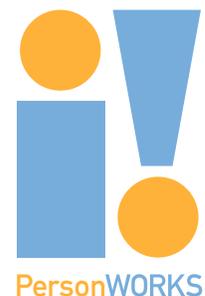
## **Work with a company that is bonded and insured.**

Disasters do happen, and you don't want to be the one left holding the bill when it's over. Personworks has seen moving trucks get stolen--and worse. Make sure your organizer can take care of you if something goes wrong.

## **Check their web site.**

You can learn a lot from a company's web site. Look for answers to these questions:

- How long have they been in business?
- Are they a full-time professional organizer, or do they do other work as well?
- Does their website look professional?
- Do they offer newsletters, weblogs, or mailing lists that you can read to get an idea of their methods and techniques?



**LESLIE STRAKA**  
Cell: 425-922-3760  
Fax: 928-223-8938  
[leslie@personworks.com](mailto:leslie@personworks.com)