Reduce the Clutter & Organize Your Desk
Webinar with Stephanie Calahan
'On a Clear Day … I Can See The Top of My Desk'
March 1, 2012

Simply put, organization is 'finding what you need, when you need it, with little effort!' Being organized is not about being perfect. In fact, it's not easy for a lot of people. It's about how your environment functions, not how it looks. The esthetics are personal choice, but the organization is functional, and directly impacts your quality of life.

So today we're going to talk about:

- **Time**
- **Space**
- **Information**

So that you can get greater results with less effort! In my program, we have 6 solid strategies to help you unleash your freedom plan that allows you to do all those things that you haven't been able to do. Obviously, we can't cover all of them in detail today, but later I'll share how you can know more.

You see people often ask me 'what should I do?', but the real question to ask yourself is 'what WILL I do?' And that's what we want to explore today. So by the end of this session, you're going to walk away with strategies you can use right away and I'll also share with you how to move from where you are to where you want to be, and you'll have some great next steps outlined.

Does this desk look familiar? It does for a lot of people and this desk also represents all of the top 4 time stealers for both business owners and business professionals. So let's talk about those top 4 time stealers:

Lack of good systems & processes for all aspects of your business

Time/Priority management & interruption issues:
The feeling that you need to be able to respond to people immediately and difficulty saying 'no' to things that they shouldn't be involved with. What we encourage people to do is to think through how they can work most effectively in their day. Develop a process and strategy for how you will schedule your week, day, hour; and you'll have less stress worrying about getting things done.

Lack of email and social networking strategies
This is actually the number 2 reason that people come to us for help, because we are all inundated with email, Facebook, Twitter, etc., and it just keeps coming. Evaluate your electronic information and set realistic amount of time everyday where you'll deal with what is coming in, and where possible, use rules to help you manage all of that.

Problems structuring physical space
The physical set up of your office is important to the process flow of your day. Think of your space in varying forms of valuable real estate. Everything within your arms reach is your most valuable real estate. Do you keep paper work or reference material that you

use on a regular basis far from your work-space? Does it get put away? The most frequently accessed items should be placed in the easiest reach and work out from that. Be intentional with how you set up your space. You see, people waste an amazing amount of time looking for things and that is space issues -- whether it's paper things or supplies or even electronic documents. I have some clients that will even recreate a document because they feel it's faster than finding what they made the first time around. In fact, the National Association of Professional Organizers found that 80% of the papers that were filed were never referenced again largely because people could not find them.

Some people love computers because they can cut down on paper clutter. In fact, having a digital solution to storing your paper files can be a very viable option and that's something that we help our clients with. However research has shown that the amount of paper we have is only growing. Computers have made our world a much more information rich society, but they've also created so much information that it's sometimes harder to keep track of it all.

Offices like this one aren't really all that uncommon. So the first thing I want you to think about when you're looking at clearing up the clutter is not creating new clutter on top of what you already have. So when you get an email or a .pdf file or any other document in an electronic form, ask yourself if you REALLY do need it in physical form or if you can look at it online. Oftentimes, people will print things as part of a habit rather than thinking through, 'do I really need this in physical form?' Now of course, if you do (and I'll admit), I don't really like to read things that are really long on my screen, I need to print them out. Sometimes I'll use creative print strategies where I'm printing on both sides of the paper to conserve paper and conserve space, but there are still instances where I too want to print it out, but the first tip here is to really think about it before you click the print.

What are the costs of disorganization?

I cover this because a lot of times we just think it's the clutter all around us but there is more to it than that.

Lost time: Time stymied in productivity; time spent looking for lost objects; time spent fixing objects broken under piles of stuff; or time spent shopping for replacements of lost items. Remember I said that the average person wastes 150 hours looking for things. That's big!

Lost money: Money spent for replacements of lost items; late fees for bills lost in piles of clutter; etc.

Lost serenity/increased stress: Some things that can't even easily be quantified like lost serenity/increased stress, maybe damage to your credibility. You know, if you shutter when someone knocks on the door of your office, maybe it's time to be thinking about how clutter is impacting your emotional state as well.

Lack of confidence: Feelings of anxiety due to the clutter, diminished competence or maybe there is interpersonal tension or arguments among co-workers or family. No calm quiet place to breath and think so that you can grow your business.

I have a lot of people tell me that 'I find it eventually' and that's probably true for many, but again, the average person spends over 150 hours per year just looking for

information. And studies go on to say that the average executive and business owner, looks for information for over 6 weeks of their year.

Now I have a lot of people that tell me 'I don't have time to get good systems in place' but when you look at these statistics, I'd encourage you to ask yourself 'how do you have time NOT to put these systems in place?'

And lastly, let's look at the dollars and cents of it too. Your work is where you likely spend 33% of your time daily; and for many people, even more than that. And where you generate 100% of your income. If your business isn't effectively structure with good systems in place, it is costing you money!

If you've looked for something for 5 minutes, how much have you lost in revenue potential? How many times have you looked for something and it took you more than 30 seconds to find? Besides losing money, what could you have accomplished in that time?

So we've talked about some of the cost of disorganization, and why you might want to get organized, and we've even talked about one definition of organized, but I wanted to share two with you today. And this second is one that you may not be thinking of, but you see organization is an art. There are top time-stealers and physical space, like I said, is the number one reason that people contact us.

Another way to look at the systems and processes that you have in your business, whether you are looking at the paper, or any other system or process that you have as you are evaluating the functionality of how your business is operating is by asking yourself these questions:

- **Does it work?**
- **Do I like it?**
- **Does it work for others?**
- **How quickly can I recover?**

This last question is one that a lot of people do not know how to evaluate. Well, let me share a personal story to help illustrate that. This is a question that I had to ask myself in 2007. You see, I had just come back from a conference and I was fired up about my business and really excited. A few days later, my husband, who had just gotten a clean bill of health a month earlier, had a massive heart attack. We were in the hospital for 8 days, and then there was 8 weeks of recovery because of the amount of damage that he had.

As you can imagine, I went from being totally fired up about my business to that really took a 2nd priority. My husband's well-being and care for him became 1st priority. However as all that was happening in our life, the email did not stop, the phone calls did not stop, the regular mail and the paper did not stop. And when I came back to my office and we were back to fully functioning mode again, and we did kind of work our way into that over the 8 weeks, but as we were back into that mode, I had to ask myself 'how quickly can I recover from this backlog of information that has piled up because life happened to me?' I found that a good majority of my systems and processes flowed really well. I was able to work through the backlog and get right back into work. There were a couple of things that we needed to change and tweak and get a little bit more smoother goings so that the next time that life happened, we could recover even faster.

So think of those things as you're looking at the organizing systems and other business process systems that you have in place.

Clutter equals decisions that you are not making! Realize that and really absorb that. The piles of paper that you have on your desk, on the counters, on the floors, wherever those piles are, the emails that you have that are filling up your in-box, they are decisions you are not making.

Have you ever walked into your office, and say, 'ok, today is the day. I'm going to clean up this mess!' And you pick up a piece of paper and you think of a number of reasons why today is not a good day to work this and then you pick up the next piece of paper and your say, 'huh! What is this? I'm not sure and you put it down.' You pick up another piece of paper….'oh I'm not sure why I kept this. I'll have to figure that out.' And you put that down. Before you know it, everything that was on the left side of your desk is now over on the right side of your desk. Is that familiar to you?

You see, those postponed decisions can be found in 3 major areas because clutter is anything that you own, possess or do that does not enhance your life on a regular basis. Many people think of clutter as things that surround us like piles. That's certainly true, but we can also clutter up our schedules in our daily lives, and when your schedule is cluttered, you don't have time to be putting in place the systems and processes, or even just working your daily operations.

If decision-making is not your strength, accumulating things will be your weakness. So how do we put all of this into action?

Have you ever heard the phrase, 'only touch a piece of paper once'? Before you create an organizing plan for your organization, evaluate the necessity of removing the backlog. If you have a disaster of an office, you have to get it cleared out and start over fresh before you can make a difference.

Understand that my philosophy of only touch a piece of paper once, is that it is a myth! And that the only time that you should only touch a piece of paper once is with Kleenex and Charmin. You see, when you're working on a backlog of items, your brain is going to work faster if you work through things in a series of threes.

Don't get me wrong. The rule of only touch a piece of paper once is a valid rule, but the rule is in place with the assumption that you already had systems and processes in place. That the space was already clear. And once your space is clear and you have systems and processes in place, absolutely only touch a piece of paper once and put it where it belongs rather than letting it pile on your desk. However, many people aren't there, and that's what we want to talk about.

If you want to clear the piles from your desk, and your life, I want you to think DART. DART stands for:

D = Decide to decide!

A = Act or Action Items

R = Reference Items

T = Toss: Delete/Recycle/Shred/Trash/Sell, etc.

On a high level, the most important thing is to decide to decide, because remember I said that clutter is postponed decisions. Clutter is decisions you've decided not to do. Clutter and that backlog is caused by postponed decisions.

It takes your thought and creativity to make it work. Everyone is going to process a little differently, and it's important that you filter the factors. **Decision makers break it down**, and that is what DART is all about.

~~~~~~~~~~~~~~~~~~~~~~~~~~~

> "Great decision makers aren't those who process the most information or spend the most ime deliberating, but those who filter the factors that matter from an overwhelming number of variables." from Blink by Malcolm Gladwell

~~~~~~~~~~~~~~~~~~~~~~~~~~~

For starters, there are a number of questions you can ask yourself when you're going through that backlog of papers; and remember we are going through the DART system:

1. **Does it require any action by me or us?** If it does, put it in the 'act' pile. That could be a phone call that needs to be made, something that needs to be written, anything where a verb is associated where you need to do something.
2. **Are there any tax or legal implications for the piece of paper?** Obviously if there are tax and/or legal implications, then it is something you need to keep. So this would be something you would put in your reference file, most likely, unless you're around the April timeframe when you're working on your taxes. It's generally something you're keeping for reference until you need it for a later date. So it is a reference item.
3. **Is it recent enough to be useful?** We all keep things because we might need it someday. That's one that I hear from every single client, but as you're looking at your backlog, maybe there are things that you have kept because you might need it someday, but ask yourself is it something that you can use today. Many of my clients find that the information that they've kept, they know that their industry has updated the information, and what they are holding in their hand is no longer useful to them. I

   I had a client once who had an administrative assistant who asked this question to him, and he was a lawyer. He had a 5 shelf bookcase system of phone books. They were all phone books that he kept because he might need them someday. When she asked him, 'why do you have these phone books?' and she could not get him to let all of them go. Even though he acknowledged that the contact information in the phone books were not recent enough to be useful, his original intent was to keep them so that he could look back to see who practiced law in a certain year and place. He couldn't quite bring himself to letting all of the phone books go, but we came pretty close. They took an Exacto knife and cut out the yellow pages for 'Lawyers' from everyone of those books and put that into one file folder and then recycled the rest of the books. It freed up an entire bookshelf worth of space, which was really critical for this law firm because they were

bursting at the seams and actually thinking that they would have to pay for a bigger space.

4. **Is it difficult to obtain again?** If it is difficult to obtain again, such as birth certificates, death certificates, marriage certificates, life event types of things, but you can also have things like your incorporation papers that would be difficult to obtain again. Or certifications that you've earned. If you have papers that are difficult to obtain again, it certainly makes sense to keep them if you have the space for it. These would be reference items.

A few more things that you can think about in the backlog of clutter:

5. **Is it beautiful, useful or loved?** I have a number of clients that have gift and reports and documents and things they've received from clients that they absolutely adored that don't serve a purpose for them at that time. It may be something that they don't necessarily find esthetically pleasing - a painting, a photo or something they received from a client. It is ok to let go of these things and make space for those things that are going to enhance your workspace. It really is ok to let them go to someone else who can find joy in them, and not stress.
6. **Can I identify a specific use for the item?** This is a great follow up question for the 'I might need it someday' because that is really a fear statement. We hold onto a lot of things because of fear, but if you can ask yourself these questions, it will help you get out of fear and into logical decision making for your situation. For some people, you may have two totally different offices with the exact same type of information and one person could identify how they would use it and another person couldn't. Your going to have different responses for that same type of information. It's ok. It's about your space and what is going to work for you. So if you can identify a specific use for the item, keep it. If not, go ahead and toss it.
7. **Does it reflect the person I am today?** I can't tell you the number of clients that I work with where this question is really helpful to them. You might have taken various training courses, delivered different projects or products, and they are things that you've done with your past history but maybe they are things that you don't do today.
8. This is my personal favorite question….**what is the worst thing that could happen if I let this go?** Again, oftentimes we keep things out of fear, so if we ask ourselves the follow up question, how bad would it be if I let go of this. A lot of my clients will say 'well, you know I could find it on the Internet really easily' or 'I have an electronic version of it anyway on my desktop.' You'll find that you can let go of a lot of things because that worst thing that could happen isn't all that bad. Now if that worst thing that could happen is really truly horrible, then keep it.

These questions are simply meant to help you filter through what truly needs to stay versus what things you can let go of. So we've went through the questions and you have this pile of information that is 'action' files and a pile of information that's 'reference' and a pile of information that's 'toss.'

I want to talk a bit about 'toss'. To say that toss does not mean throw away. It could, but doesn't necessarily have to. It could mean that it doesn't belong in this room. It could mean recycle, shred, donate, sell. It's just toss - not in this room.

So let's look at that 'action' pile. The action pile should have things in it when the ball is in your court. It could be things in your 'inbox', your 'outbox', or your 'to file box'. Some people use the inbox and outbox effectively, but others use them to just put stuff.

Inbox means I haven't looked at it yet. I haven't processed it. It is not a place to hold your 'to-do's'.

Your outbox is information that needs to go out of the office, whether it's to another person within your office or to the mailbox and so on.

Your To File box is information that has already been processed that you need to get into file folders, that you don't have the time right at the moment to do it. The trick is to not have those in, out and file boxes too deep so that it doesn't create a backlog right there.

Another action item is your calendar, planner, palm, PDA, Smart Phone, iPhone, and all the other ways that you can hold your information.

Now if you're interested in a video or checklist of how to create a fabulous action system, I encourage you to send us an email at support@calahansolutions.com and we'll send you that information.

Now let's talk about the 'reference' pile. Your reference information is information that you want to keep, your contact manager, your reference files. I strongly recommend Paper Tiger. It's your address book if you don't have a contact manager. It's all those places that you would go to, could be binders, books, hanging file folders or file folders such as what you would see in a doctors office. Physical make up isn't where I want you to focus here. It's the information that you need to access, but you don't need to access it necessarily on a daily basis.

We learned way back in pre-school that putting a square peg in a round hole just doesn't work, but yet we try to do the same thing all of the time by putting systems in place that don't match our personal or our organizational styles. So by being really realistic about your lifestyle and your personal style, and focusing on the way you live, it will help you get the right things in place for you.

- Be realistic about your lifestyle
- Be realistic about your personal style
- Understand your style so that you can build the systems around it
- Make your system fit your life

Just like there are different thinking, working, communication and learning styles, there are different organizing styles and productivity styles. They have different rates that they can absorb information.

~~~~~~~~~~~~~~~~~~~~~~~~~~

> "To be yourself in a world that is constantly trying to make you something else is the greatest accomplishment."
>
> Ralph Waldo Emerson

~~~~~~~~~~~~~~~~~~~~~~~~~~

There are some that think that one system should work for everybody. That would be great, but the world is not that simple. The science of systems and organizing is the tip or the tool, but the art is knowing which tips and tools are going to work for you.

Understanding your style and developing systems that fit with who you are, sets you up for success. So I want to ask you 'are you an innie or are you an outtie?'

I'm talking about processing styles in the way that you think. You see an 'Innie' is someone that functions better when the space is clear of clutter. An example of an innie type tool is a regular file cabinet. It's a tool because it holds things and you can work with it, and it's an innie system because when the doors are closed, you can't see what's in it.

The reverse side of that is an 'outtie' who is someone who would hold the adage of 'out of sight, out of mind.' They need to see 'it' in order to know it exists or to take action on it. An example for an outtie system that does the exact same thing is a rolling file cart. For people that are outties, the biggest challenge is not remembering that the files are even there. It's just a different way of thinking. So the files are still structured and organized in files, but they are in a tool that keeps it out where it can be seen and top of mind.

In determining whether you are an innie or are you an outtie, just because you have piles of paper all over the place does not make you an outtie. I'm talking about systems that work differently for different people in how you think and work.

Here is another example of an innie system versus an outtie system. One that has things closed behind closed doors and one that has things on open shelving.

A lot of people that struggle with Attention Deficit (ADD or ADHD), are outtie style but you would want to test that as well. Also recognize that when you have an outtie style, you've got to be really careful and guard against the stacking and spreading that can occur when you have multiple horizontal surfaces.

Another example of an innie or outtie system, one with an armoire where your computer system is all closed up when you're not using it versus a system where it is all out in the open at all times.

Now I'll tell you, I am personally an innie with a little bit of outtie tendencies. Here is how I evaluated that personally. I know that I can get easily distracted with things that are on either side of my peripheral vision, so if I had a lot of piles of papers all over the place or if I had projects out all over the place, I'd be focused on one thing in front of me and my peripheral vision would say, 'oh right, I've got to do this…'oh right, I've got to do that' and I could get distracted. I'd waste time. By having things behind closed doors, I focus on the thing that is important to me at the time whether it's my computer screen or whether it's a document on my desk and then I move on to the next thing.

For people that are outties, that doesn't occur. If it's behind closed doors, they might even forget that the project exists. So those are some different tips and strategies you can think through of how do I really work best. where do I find that I am at my best in terms of really thinking through things, and then set up the systems that work for you in that way.

I talked earlier about action filing, and there's a lot ways to process those to-do's and those things you can work on; and once you've figured out your physical space and furniture, it's time to look at more detailed tools. Of course, some are more effective than others. We talked about those Act, Reference, and Toss files, so let's look at that action file again, but this time I want to encourage you to consider building an action filing system. One that has monthly and date tickler file system as well as one that is by action needed or verbs. This is where you would put all that paper that needs you to do something with it until you can take the action. Kind of like a parking lot for your paper. I don't have time today to go into the specifics of how to create that action system, but if you write an email to support@calahansolutions.com, we will make sure to send you information for how you can pull your own action system together.

Now for reference paper, there are three different overall strategies that you can look at to putting a good reference system in place.

1. Traditional alphabetical
2. Pre-developed systems
3. Paper Tiger Filing System Software (one of my favorites)

Alphabetical systems typically look very easy and structured and well cared for when they are first created. It's the files and information that is added over time, that has the tendency to clutter up the system. In this example, you'll see that there are 3 or 4 alphabetical filing systems. If you'll look at the very back of this system, there are a couple of tabbed labels, and if you'll look at the middle, it's those Smead easy view filing tabs as well. So there is multiple filing systems within this one file cabinet. That's probably the cause user originally created one system, and it didn't work quite well so let's try another, and they've just kind of all merged together. But bottom line, they couldn't find anything. That is one of the challenges with a traditional alphabetical system.

The next is pre-developed filing systems. These are some examples of a couple of them and they can be really fantastic for you or a nightmare. I mentioned earlier that everyone has a different way of thinking and processing and working through information. So these pre-defined systems can work great for some people if you happen to have the same thinking style as the people who made the pre-designed system. But if you don't think the same, you spend a tremendous amount of time trying to remember what the system wants you to remember, rather than having a system that works for the way that you think.

So you've got to think through whether that pre-designed system is going to work for the way that you think. Think through the drawback versus the benefits of setting it up.

Lastly I'd encourage you to consider Paper Tiger. You see you can find anything in five seconds or less, and it can be developed for how you think.

One of my degrees is in Computer Science and when I was first introduced to the concept of Paper Tiger, I honestly didn't buy into it. I didn't think there was a way to create a software program that could be flexible enough for the needs of my clients. I don't believe in a one-size-fits-all solution, and I didn't think that a software could meet the needs of the variety of clients that I work with, but I was pleasantly surprised and wrong. When I took the time to learn about Paper Tiger, a number of years ago, I was

really excited. I have helped loads of clients implement Paper Tiger, but what is amazing is that we have not implemented it the same yet, because every business is different and every business has different ways of needing to look for information and process information. So the cool thing about Paper Tiger is that you can find anything if five seconds or less, and it's easy to learn. It even preserves your confidentiality, but it can be implemented for how you and your organization think and work.

Regardless of what filing system you create, I also encourage you to have an index. A file index helps you or anyone else quickly find what's needed. An example of an index that most everyone should be able to relate to is your high school yearbook. Within your high school yearbook, you can go to the back of the book and you can look up the name that you had in high school, and it will show you that you're on pages 5, 7 and 53. So rather than having to flip through every single page of that yearbook, you can go 5, 7 and 53 and show your children the crazy hairdo you had back when you were in school. This is an example of the file index in Paper Tiger.

Once you have the decisions made around the papers you have, and you have physical processes, tools, and furniture in place that works for the way you think and work, then you've got to put it all into action.

Kathy Waddill wrote a book entitled "The Organizing Source Book" a number of years ago, but it is still a very good read when it comes to organizing systems and processes around organizing. She researched to find the 9 strategies of reasonably organized people. Here's what she found:

Decide to decide! We've talked about that a lot today. It's important to make a decision.

Sort everything by how you use it. Now this is a little different because we mostly are told to put like things with like things. Put all your scissors together, etc., but what Kathy found is that people sorted by how they used it. For example, let's assume that you are working out of your home, if you put all of your scissors together, then the scissors you use for preparing food, the scissors you use for the gardening, and the scissors you use to cut paper in your office would all be in the same drawer. Clearly the uses for those things are very different. So rather than having all your scissors together in one space, it makes a lot more sense to have the kitchen scissors in the kitchen, the gardening scissors near all the other gardening tools, and the office scissors in your office. You're probably saying, 'who would do that?' Of course this is a really simplistic example, but I like to give examples that most people can relate to so that you can then think through how does that apply to your office as well.

Weed constantly. The rate in which you weed through things directly correlates to how quickly those things come into your environment. So if you have a busy office environment where you're getting inundated with information and paper on a regular and very fast pace, then how often you weed through things should be much more frequent than offices that have a slower pace of information coming in. But when you go through that information, asking the questions that I taught you today, weeding constantly will be much less painful than what you've experienced in the past.

Use the right containers and tools. I have a lot of clients that have gone out and bought the tools before they have figured out what they want to use them for. Notice that I've listed the sorting and weeding in this list first. Figure out what you really need to

organize before you go buy the tools. Oftentimes, people have bought so many organizing tools, that the tools themselves have become clutter. Don’t let that happen to you!

Keep it simple! Build your systems with the fewest steps possible. The more steps it takes to do something, the less likely you are to actually do it.

The next step in Kathy's system is to **label everything!** I've talked to a lot of people who believe that labeling is not a good use of time, but I will tell you that labeling is your memory and brain replacement. Now what do I mean by that? If you don't have a good memory, then labeling can save you on a daily basis. If you do have a good memory, what I find working with my clients especially those with really good memories is that when the heat gets turned up, when things get really stressful, all of a sudden they forget things that they would normally remember on a day to day basis. By having labels in place, it does two things. It helps you remember those things when the heat gets turned up; and it allows you to delegate a lot better too.

Get help when needed. That could mean working with someone like me that does business transformation coaching or it could mean working with someone in your office who happens to be very skilled in that area you need. It could be a neighbor, co-worker, someone in your Mastermind group -- there's a lot of different options, but when you get stuck, be ok with asking for help. That's going to move you forward a lot faster.

Evaluate continuously because life happens! There are things that we do when we first start our business that completely change as our business evolves over time. So evaluate the systems and processes that you've placed around the paper in your office, and all the other processes that you have that you need to make your business run. You'll be able to keep things on a cool, calm flowing basis.

Identify where and how to get started. Some people have more backlog than others and you need to work through that backlog before you can get the systems and processes in place that are going to work for you.

I shared with you previously that the average person wastes 150 hours looking for things, and the average executive wastes 6 weeks every year just looking for things. The truth is every performance gap, every little inefficiency, every lack of organization or productivity, not only reduces the effectiveness of your business, it also steals time from your personal life. This is true for all business owners. The purpose for an organized ad productive environment is to enable you to accomplish your goals and enjoy your life.

So what would that mean to you? What is your freedom plan? You have to take action to change your situation. The best way for you to move forward and take action is to have a solid plan for you situation.