



Creating Order  
from Chaos

# Professional Organiser Training

## Module 4 – Tools & Systems

## A Professional Organiser's Tools

Some of the things you may want to take to an on-site consultation are...

For Self-Care & Safety:

- Food & Water
- Sunscreen
- Hayfever medication
- First Aid Kit
- Dust mask
- Hand sanitiser
- Tissues/Wipes
- Bug spray
- Work gloves
- Disposable gloves
- Step ladder
- A sense of humour

For Admin & Assessment:

- Street directory/Sat. Nav.
- Agreement
- Payment details
- Business cards
- Diary
- Invoice book or app
- Camera
- Portfolio
- Supplier catalogues
- Product samples
- Notepad
- Tape measure
- Graph paper
- Ruler
- Pens
- Coloured Markers
- Highlighters
- Printed copies of your Code of Conduct
- Accurate information about identity theft
- Charity policies
- Helpful articles

For Hands on Work:

- Labelmaker
- Extra labelmaker tape
- Scissors
- Rubber bands
- Cable ties
- Garbage bags
- Packing tape
- Shelf supports
- Screwdrivers
- Hammer
- Sorting boxes/tubs
- Envelopes & Stamps
- Clock
- Cable identifiers
- Filing supplies
- Sorting signs
- Silicon "Sliders"

What else would you take?

## Know Your Stuff

There are many Organising theories and systems out there, from Julie Morgenstern's SPACE to David Allen's GTD to Marie Kondo's KonMari Method. To inform and educate your clients effectively, as well as customise solutions for your clients, you need to be well-informed and up-to-date with the latest ideas and products. Whether you choose to use them or not, whether you agree with them or not, it is essential to at least be aware of what's out there.

SPACE =

S \_\_\_\_\_

P \_\_\_\_\_

A \_\_\_\_\_

C \_\_\_\_\_

E \_\_\_\_\_

GTD =

G \_\_\_\_\_

T \_\_\_\_\_

D \_\_\_\_\_

Which system do you follow?

And what are the defining characteristics?

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## Getting the Job Done

There are challenges every Professional Organiser faces. Many of them are the same challenges our clients face. No matter what's on our to-do list, we have 4 options for tackling them.

### 1. Delete

- Anything that doesn't relate to your goals
- Anything that doesn't generate income (eventually)
- Test and measure every activity/product/marketing strategy to facilitate great decision making
- Learn to recognise distraction from 40 paces
- \_\_\_\_\_
- \_\_\_\_\_

### 2. Delegate

- Things outside your expertise
- To those who know their stuff
- Book-keeping
- Virtual assistants
- Web design & development
- Graphic design & branding
- Housework
- Copywriting
- \_\_\_\_\_
- \_\_\_\_\_

### 3. Automate

- Newsletters
- Product sales with auto-responders
- Google alerts & other Google services
- Copyscape plagiarism search
- Social media
- Client contact
- Marketing
- Client prep
- Media contact
- Enquiry template
- Email signatures & templates
- \_\_\_\_\_
- \_\_\_\_\_

### 4. Complete

- Set goals
- Be accountable
- Look inside and outside your industry for role models
- Ask yourself "Is this the best use of my time?"
- Ask "what's the easiest way to get this done?"
- \_\_\_\_\_
- \_\_\_\_\_

# Using Systems to Streamline Client Contact

## Sample Action Plan

Date: January 4<sup>th</sup>, 2010

- Arrange for xxx's boxes to be sent
- Return keyboard to xxx
- Sew name tags on xxx
- Contact xxx re filter
- Record xxx to CD for test
- Polish silver mirror
- Sort cosmetics
- Arrange transfer Videos to DVD
- Return CDs and tapes to cases and shelves
- Filing – 75% done
- Clear laundry – 75% done
- Forward family history items to xxx
- Arrange xxx party
- Redeem xxx voucher
- Try on pants & dry clean or donate
- 31/1/10 – Sort xxx box, following decision on xxx job

### Techie Jobs

- IBM laptop?
- iSight camera installation
- Bluetooth installation
- Panasonic/Engin
- Backup to Hard drive



## Sample Detailed Needs Assessment Report

Assessment Date: February 6<sup>th</sup>, 2010

Scope: to advise on decluttering and storage for identified “problem areas”

Suggestions:

### General

- Xxxxx, you have already created a lovely home, with useful and well-thought-out storage options. My feeling is that you will be able to achieve order and feel less stressed by doing just a small amount of work, a little at a time.
- xxxx

### Kitchen Pantry

- Start with the “desk” area. Clear everything off it, and bring all items out to the empty kitchen bench for sorting, purging, returning to its proper location.
- xxxx

### Boys' Rooms

- Store anything that's outgrown – toys, books or clothes, but which you still want to keep, in airtight clear stackable boxes.
- xxxx

### Hall Cupboard

- Review your gift needs. Assign one clear plastic box for all “standby” gifts.

## Sample Simple Needs Assessment Report

Assessment Date: February 12<sup>th</sup>, 2010

Client Goals: To make long-lasting improvements in routine to help with activities of daily living

Suggestions:

1. Home office, filing and household bills – create simple system and use space more effectively
2. Meal planning and preparation – create a simple routine with some easy to prepare healthy meal options; make better use of pantry
3. Garage – sort through garage contents to make space for the car and use storage space available
4. Clothes – sort and store clothes to make them accessible while making choice easy
5. Reorganise laundry to make better use of space and make things easier to find
6. Work on time management throughout, with simple routines that leave room for social and household activities

## Converting your Systems into Products

Anything you do successfully and routinely can be turned into a product which your clients will benefit from.

It's as easy as

1. Bright idea
2. Brainstorming
3. Great title
4. Test
5. Price
6. Measure
7. Tweak
8. Delivery

Ask yourself

- What pain is my ideal client experiencing?
- Does this product solve my ideal client's problem?
- Will they pay for this solution?
- How much will they pay?
- How will I deliver this product? Virtually or in person?  
Once or as part of an ongoing program?

## Using Systems to Help Clients

Never underestimate how much your clients need you. What may seem obvious to you can be a revelation to your client.

Some things which can transform a client's life with appropriate use, are...

- Lists
  - For accountability
  - Laminated or not
  - Custom or pro forma
  - Before, during or after the consultation
  - Text or pictorial
  - \_\_\_\_\_
  
- Labels
  - Labelmaker
  - Handwritten
  - Text or pictorial
  - 3D
  - \_\_\_\_\_
  
- Rules
  - Established (e.g. place for everything)
  - Health & safety (e.g. throw out food past use-by date)
  - Standard (e.g. only need 2 sets of sheets per bed)
  - Individual (e.g. only keep silver jewellery)
  - \_\_\_\_\_

- A clock
  - For keeping track during consultation
  - To signal moving on to the next activity
  - For setting rules (e.g. will leave for school by 8.30am to be on time)
  - Especially good for ADHD and CD clients
  - \_\_\_\_\_
  
- Simple binders
  - For loose recipes
  - Family information
  - School notices
  - Birthday list & cards
  - For “homework” and before & after photos
  - \_\_\_\_\_
  
- Timetables
  - To establish routines
  - To help with parenting
  - For project planning
  - For visual or creative clients
  - \_\_\_\_\_
  
- You can also help your clients to
  - Delete
  - Delegate
  - Automate
  - Complete

What is your favourite kind of organising tool, and why?

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