



**EXPERT ORGANIZER**

# FOUNDATIONS

*Participant Edition*

## Expert Organizer Curriculum Overview

### Foundations (10 Hours):

- **Format:** Virtual Classroom with Workbook and Video
- **Duration:** 10 Subjects / 34 Lessons
- **Curriculum:** Provided by Order University™. Visit [OrderUniversity.com](http://OrderUniversity.com) for course details.
- **Synopsis:** This course provides an in-depth understanding of foundational organizing principles. Prerequisite for this course is someone who is naturally organized as this course helps individuals learn the principles behind what they do as an organized person. Upon completion of this course you should be able to instruct others in the process of getting organized as well as the benefits of maintaining organized spaces.

### The Me In Order Platform (3 Hours):

- **Format:** Virtual Classroom
- **Duration:** 1 Session - 3 Hours
- **Curriculum:** Provided by Order University™.
- **Synopsis:** This course provides an in-depth understanding of The Me In Order Platform. Prerequisite for this course is the successful completion of the Foundations course. Upon completion of this course you will have working knowledge of Me In Order processes, procedures, and methodology necessary to be successful in the field as a Me In Order Expert Organizer.

### Platform Setup (1 Hour):

- **Format:** Virtual Classroom
- **Duration:** 1 Session - 1 Hour
- **Curriculum:** Provided by Order University™.
- **Synopsis:** This course provides instruction and insights for setting up Me In Order platform tools on your smart device. Prerequisite for this course is the purchase of the Starter Package and system setup by Me In Order Central. Upon completion of this course you will have Me In Order platform tools setup on your device.

### Platform Tools (1 Hour):

- **Format:** Virtual Classroom
- **Duration:** 1 Session - 1 Hour
- **Curriculum:** Provided by Order University™.
- **Synopsis:** This course provides an in-depth understanding of the tools provided by Me In Order. Prerequisite for this course is the successful completion of the Foundations course. Upon completion of this course you will have working knowledge of the Me In Order platform tools necessary to be successful in the field as a Me In Order Expert Organizer.

## Field Experience (Up to 40 Hours):

- **Format:** Visiting current Me In Order clients with a Team Captain and working "live" with the client under the lead of your Team Captain.
- **Duration:** Until the Mentee and Mentors know that the Mentee is ready to work solo in the field as a Team Captain.
- **Curriculum:** Experience is often the best teacher. This portion of the Certification is made available so that the Mentee gains hands-on experience with the Me In Order platform as well as real world organizing experiences with real clients.
- **Synopsis:** This portion of the Certification provides the Mentee with real-world experience working in the field as a Me In Order Expert Organizer.

## Field Mentorship (Up to 8 Hours):

- **Format:** Post Field Experience session meeting with the Team Captain/Mentor either in person or via telephone/video calls.
- **Duration:** Up to 1 Hour after the session.
- **Curriculum:** Overview of the session with an emphasis on what improvements can be made by the Mentee.
- **Synopsis:** This is a critical portion of the Mentee's Field Experience as the Mentee uses their Field Experience to fine-tune their own abilities and confidence as a Me In Order Expert Organizer. This is where a Mentee's Classroom and Field Experience come together.

## Certified Expert Organizer Designation (CEO Level 1):

- **Format:** Working with clients as a Team Captain
- **Duration:** Begins after all classroom education has successfully been completed and the Mentee and Mentors are confident that the Mentee is ready to work solo in the field as a Team Captain.
- **Curriculum:** Begins with the successful completion of all classroom education with a passing grade on the final exam of 70% or more, along with sufficient Field Experience and Mentoring.
- **Continuing Education:** After initial certification, recertification is required every year. CEOs may re-certify by completing and submitting 30 or more Continuing Education Units (CEUs) by their CEO designation anniversary date. In addition, CEO designation is only available for Expert Organizers actively organizing with Me In Order. Therefore, in order to maintain your CEO designation, you must also complete the minimum number of billable hours per year with Me In Order (see your Independent Contractors Agreement).
- **Synopsis:** The CEO designation stands for excellence in the organizing industry. Those that gain and maintain the CEO designation are among the very best in the organizing industry.

# FOUNDATIONS

## Foundations Course Syllabus

### Section One

#### Introduction to Organizing (Subject 1)

- What is Clutter
  - What is Organizing
  - Macro and Micro Organizing
  - The 5 Steps of Organizing
  - Organizing Lingo
  - Subject Quiz
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### Section Two

#### Assessing Projects (Subject 2)

- Preparing for a Session
- Client Assessments
- Where to Start
- Asking the Right Questions
- Subject Quiz

#### Organizing Room by Room (Subject 3)

- Creating Zones in Home Spaces
- Kitchen
- Family Room
- Home Office
- Bathroom
- Bedroom
- Children's Room
- Garage
- Closet
- Maintenance Tips
- Nuggets of Organizing Truths
- Subject Quiz

## Section Three

### **Paperwork** (Subject 4)

- Difficulties of Paper
- Organizing Paper (Part 1)
- Organizing Paper (Part 2)
- Subject Quiz

### **Time Management** (Subject 5)

- Time Management
  - Subject Quiz
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## Section Four

### **Chronic Disorganization** (Subject 6)

- Chronic Disorganization
- Subject Quiz

### **Hoarding** (Subject 7)

- Hoarding
- The Clutter-Hoarding Scale
- Clutter Image Rating Scale
- Subject Quiz

### **Learning Styles** (Subject 8)

- Learning Styles
  - What's My Personality Type?
  - Subject Quiz
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## Section Five

### **Relocations** (Subject 9)

- Packing Strategies
- Unpacking Strategies
- Downsizing Homes
- Subject Quiz

### **Wrapping Up A Session** (Subject 10)

- Wrapping Up A Session
- Subject Quiz

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### **Building Your Expertise** (Bonus Content)

- Beyond Foundations
- From The Web

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## Foundations Final Exam

# INTRODUCTION TO ORGANIZING

## What Is Clutter

### Clutter defined:

According to Merriam-Webster dictionary, clutter is to fill or cover with many things.

Clutter is anything that is not placed with the intention of future use or is not serving a purpose. Anything unwanted or in the way is clutter.

Clutter can also be distractions. Distractions keep us from living the life we want to live. It can be physical and mental, ranging from clothes scattered around a room to piles of paper all around. It could also be the many activities we and/or our family are involved in.

To keep it simple, we define clutter as \_\_\_\_\_ and actions.

Clutter accumulates slowly over time and it eventually becomes overwhelming and suffocating, preventing us from living a good life. Our clients didn't go to bed one night and wake up with a home full of clutter...it happened over time. It's our job to remind them that it will take some time to declutter as well. Yes, we like to think we are miracle workers but unfortunately we don't have any magic wands.

### There are three types of clutter:

- 1) \_\_\_\_\_ **Clutter** – stuff that accumulates over time from negligence.  
This is usually those delayed decisions and actions. Like the mail that comes into our homes...the clothes that we fail to wash and put away to the toys that our kids no longer play with.
- 2) \_\_\_\_\_ **Clutter** – which are the stored treasures that we feel remind us of someone or something special. Items that have some emotional value to them: kids artwork, travel mementos and even the clothes our parents used to wear.
- 3) \_\_\_\_\_ **Clutter** – Here we are referring to the packing materials from the things we purchased. We may feel guilty getting rid of it because it should be recycled or we can use it later.

### Clutter enters our homes in several ways:

- 1) **From** \_\_\_\_\_ – we purchase items to come into our homes

- 2) **From Other** \_\_\_\_\_ – someone is giving us items that come into our homes (gifts and hand me downs are great examples)
- 3) **From our** \_\_\_\_\_ – not always physical clutter, it could be time commitments and other types of communications

## Three causes of clutter:

We agree with Julie Morgenstern, author of Organizing from the Inside Out, that there are three causes of clutter:

- 1) \_\_\_\_\_ Errors
- 2) External \_\_\_\_\_
- 3) Psychological \_\_\_\_\_

\_\_\_\_\_ are simple, mechanical mistakes in ones organizing system that needs to be addressed. Most clutter occurs because of at least one technical error.

\_\_\_\_\_ are the environmental issues beyond our control that may be skewing your expectations.

\_\_\_\_\_ include hidden, internal forces that make us gravitate toward our disorganization, no matter how much we want to have control.

To start, let's discuss some Technical Errors that can cause clutter:

Examples of Technical Errors that can cause clutter:

- 1) **No Assigned** \_\_\_\_\_ – We would like to put things away, but we just don't know where.
- 2) **Inconvenient** \_\_\_\_\_ – Storing items too far away from where they are used. If it's too hard to put something away, we simply won't do it.
- 3) **Too Much** \_\_\_\_\_ – Drawers, cabinets and closets are packed full and you have more possessions than places to put them.
- 4) **Complex** \_\_\_\_\_ – The creation of an impossibly complicated system, over-categorizing items and ending up with too many places to look for things. You have a system you don't trust and stop putting things away because you are afraid that you'll never find them again.

- 5) **Out of \_\_\_\_\_, Out of \_\_\_\_\_** – Leaving things out as visual reminders of what you have to do but once the volume builds, everything begins to blend into the environment.
- 6) **Organizing is Not \_\_\_\_\_** – Not putting things away because cleanup is a chore and there are more interesting ways to spend your time. Let's face it, to most people organizing is a repetitive, sometimes tedious task. It's not fun unless we make it fun.

So, once again Technical errors are just simple mechanical errors that can be easily fixed.

Now, on to some examples of External Realities:

- 1) **Unrealistic \_\_\_\_\_** – Possibly the result of a company downsizing, dual-income families or home-based businesses. It is really hard to squeeze 80 hours of work into a 60 hour work week.
- 2) **Technology \_\_\_\_\_** – With the advances of technology moving at the speed of light, we feel we must work smarter, move faster and know more and we are struggling to keep up.
- 3) **\_\_\_\_\_** – Transitions equal major changes. When going through a new set of realities it takes time to process what is going on.
- 4) **\_\_\_\_\_ Partners** – Working with one individual who wants to change while another person in the home may not want to change.
- 5) **Limited \_\_\_\_\_** – Some homes just don't have the storage space needed to accommodate the family after all the pairing down that has taken place.

External Realities make things a little bit more challenging but as an Expert Organizer you have the knowledge and experience to guide the clients.

Finally, Psychological Obstacles:

Psychological Obstacles are the most challenging causes because there is more at play than just physical elements. These are the hidden, internal forces that cause clutter.

Some Examples of Psychological Obstacles:

- 1) **Need for \_\_\_\_\_** – Some people get a feeling of safety because of the stuff around them.
- 2) **Need for \_\_\_\_\_** – They feel in control amidst the craziness.
  - a. They love responding to crises

- b. Their organizational systems are always a work in progress, never completely done
- c. And they get bored with maintenance

- 3) **Not Having Clear \_\_\_\_\_ and \_\_\_\_\_**
- 4) \_\_\_\_\_ **of Success/\_\_\_\_\_ of Failure** – Organization will allow one to achieve their goals. If one has a fear of success, then they may be sabotaging their efforts.
- 5) **Need to \_\_\_\_\_** – For some, clutter is their way of hiding from the world. It's their safety net.
- 6) **Fear of Losing \_\_\_\_\_** – Many creative people believe this. However, the thought that organization thwarts creativity is far from the truth.
- 7) **Need for \_\_\_\_\_** – Being disorganized can keep one distracted from bigger issues in their life. Think about it, what in your life do you allow to distract you to avoid important things on your "to-do" list.
- 8) **Disliking the \_\_\_\_\_** is another psychological obstacle, some spaces just aren't ideal.
- 9) \_\_\_\_\_ **Attachment** – Some items have a tremendous meaning to us because we have given them meaning.
- 10) **Need for \_\_\_\_\_** – Some of us won't move forward because of perfection. But in reality, perfection doesn't exist, nor does the perfect organization system.

## What is Organizing

### Organizing defined:

According to Merriam-Webster dictionary, organizing is to arrange or order things so that they can be found or used easily and quickly, it is to put things into a particular arrangement or order.

Organizing is about \_\_\_\_\_ and \_\_\_\_\_. Not just about making it look neat or tidy. Yes, it does include a space that is easy to look at, but more importantly it needs to function properly and one must be able to move around in the space.

Remember, order is whatever helps one \_\_\_\_\_ effectively!

Julie Morgenstern, author of *Organizing from the Inside Out*, proposes a new definition of organizing:

“Organizing is the process by which we create \_\_\_\_\_ that enable us to live, work, and relax exactly as we want to. When we are organized, our homes, offices, and schedules reflect and encourage who we are, what we want and where we are going.”

Organizing is not just about removing the clutter from the space. It is about designing the space, so it works for the client logically and efficiently so that staying organized will be easier for them. Many people who try to help others get organized focus on what works for them and not the person they are organizing.

Organizing is also about knowing what is important to you so you can focus on things more effectively.

It is a skill that can be learned but for some it can be a difficult lesson. However, it's great people like you and me who help them master the skills.

It is important to remember that organization must be \_\_\_\_\_. It is not a one and done deal.

Julie Morgenstern goes on to say, “Organizing from the inside out is a method that accommodates your personality, needs, situation and goals rather than forces you to change.” And in order to do this, we must learn to ask the right questions. Which is a topic that we will discuss in a later lesson.

### 3 Steps to Organizing:

Julie Morgenstern states that there are three important steps that should be followed to be successful:

- 1) \_\_\_\_\_ – this is where one takes a look at their current situation and asks themselves where they are, where they want to go, what's holding them back and why they want to get organized.

- 2) \_\_\_\_\_ – Creating a plan of action for the transformation including a timeline and whether assistance is recommended or not.
- 3) \_\_\_\_\_ – Sorting and arranging items to reflect the way one thinks, making sure they see visible results as work continues.

In our last lesson, we learned about the different causes of clutter. Now let's review those causes and offer solutions from an organizational standpoint:

Remember, technical errors are those simple mechanical mistakes in our systems that need to be tweaked. Here are the errors once again with their solutions

## Technical Error Solutions:

### 1) No Assigned Home

- a. The solution is to \_\_\_\_\_ what one has, and \_\_\_\_\_ each item a single, consistent home. We need to determine where the item is used, who uses it, and where the best location is for convenient access.

### 2) Inconvenient Storage

- a. The solution is to design a space based on \_\_\_\_\_, i.e. storing items at their point of use, having the appropriate organizing tool including a cabinet, container, a shelf or drawer.

### 3) Too Much Stuff

- a. Ideally, the solution is to \_\_\_\_\_ the number of \_\_\_\_\_. However, if that is not what the client wants then the solution would be to: 1. Add storage units to accommodate the volume, or 2. Create storage space by making better use of unused space. One could also use a combination of both if needed.

### 4) Complex and Confusing Systems

- a. "Keep it Simple" is a great motto we like to use. The solution is to design a \_\_\_\_\_, logical system that offers visual cues for quick, easy retrieval. This is usually the best idea but not always, because we also need to consider the client's preferences.

### 5) Out of Sight, Out of Mind

- a. For individuals who feel this way, the solution is to create a less obtrusive system for reminding them of things that are important and developing a simple \_\_\_\_\_ system.

## 6) Organizing is Boring

- a. The solution is to design a more \_\_\_\_\_ system, one that grabs their attention.

Now let's look at those external realities. These are things beyond our control that may be skewing our expectations. Here are some solutions on how to combat external realities.

### External Realities Solutions:

#### 1) Unrealistic \_\_\_\_\_

- a. For those trying to cram 80 hours of work into a 60-hour work week the solution may include discussing their responsibilities with their employer or their family, hiring additional help and/or delegating responsibilities to lighten the workload.

#### 2) Technology \_\_\_\_\_

- a. Technology will always be changing. So the solution here is to remember that technology is a tool and each new tool costs you time and money to learn and maintain. The key is to resist the constant changes, and prevent burnout from always having to learn a new "tool." Learn to say no. You don't need 10 versions of "to-do" lists.

#### 3) \_\_\_\_\_ – usually a major change = breakdowns in organizational systems

- a. The solution is to wait until you have a clearer picture of your new priorities and needs before starting a new organizing system.

#### 4) Uncooperative \_\_\_\_\_

- a. When working with families, not everyone will be interested in changing. The solution is to have the family members communicate with each other about their individual desires and then see how you as an expert can facilitate those desires. Designing an organizing system that is easy to understand and simple to maintain for all parties is key to maintaining order.

#### 5) Limited \_\_\_\_\_ – not to be confused with having "More stuff than storage"

- a. When one has pared down their belongings as much as they can, and have maximized your space, then there may be a need for an off-site storage or move to a large space.

Lastly, how do we help those with Psychological Obstacles? Those hidden, internal forces that make us gravitate towards disorganization. Often time these obstacles may need the guidance of a counselor or therapist, but we can provide some solutions as well.

### Psychological Obstacles Solutions:

#### 1) Need for Abundance

- a. If there is a need for abundance, organize what you \_\_\_\_\_ instead of trying to get rid of stuff. Sometimes seeing what you have and how much you have allows you to part with some.

## 2) Need for Chaos

- a. The solution here is to remember that our organizational systems are always being \_\_\_\_\_. There is always tweaking needed and we don't need to start from scratch every time. There are probably other issues going on and this may be one of those obstacles that need additional support.

## 3) Unclear Goals and Priorities

- a. Sometimes their goals and priorities are unclear because they have not taken the time to think about them. Helping them learn their \_\_\_\_\_ for the need of organization and developing action steps may be just what they need.

## 4) Fear of Success/Fear of Failure

- a. Helping them walk through the \_\_\_\_\_ may help them realize getting organized really isn't bad. What's the worst thing that could happen, what's the best thing that could happen?

## 5) Need to Retreat

- a. Another one of those obstacles that may need additional support from another professional. The solution we may be able to provide is creating a space that is \_\_\_\_\_ for the client.

## 6) Fear of Losing Creativity

- a. The solution is to acknowledge the truth that organization doesn't negatively affect their creativity; it actually helps it. Organization allows them to have access to their materials more easily than not. The key is to \_\_\_\_\_ an organizational system that feeds their creativity.

## 7) Need for Distraction

- a. Another obstacle for another professional. We may be able to help by reducing the number of distractions and perhaps even breaking down what they are \_\_\_\_\_ to more manageable tasks.

## 8) Dislike The Space

- a. If they don't like the space, they won't take the time to create \_\_\_\_\_. If they can change spaces, they should do it. But, if that is not possible, think about how you can help change the space to make it more enjoyable for them.

## 9) Sentimental Attachment

- a. Some items have the attachment because we have given them \_\_\_\_\_. In reality, one can still have the memories of the past without holding onto the actual items. A solution to help us realize this is placing these items in a more remote location, which may help build the ability to let go.

## 10) Need for Perfection

- a. Help them realize that they need to implement a \_\_\_\_\_ before they can determine if it will work or not. There must be a system in place in order to perfect it.

So, there you have it, some general solutions to combat the causes of clutter. Organization is needed in everything to be successful in life. The degree of organization just varies based on the individual.

Before we end this lesson, I want to discuss the various types of organizing available. This is not an all-inclusive list, rather the most common types of organizing.

### Types of Organizing:

- \_\_\_\_\_ **Organizing** – focuses on clutter control, general space organizing, kitchen organizing, garages, collections and photo organizing
- **Paper/Informational Organizing** – reducing paper, filing systems, records retention, computer consulting
- \_\_\_\_\_ **Organizing** – general productivity, policies and procedures, project management, event/meeting planning
- **Office Organizing** – workplace organizing which may include aspects of workflow.
- \_\_\_\_\_ **Disorganization/Hoarding**
- \_\_\_\_\_ **Organizing** – moving, downsizing, estate organizing, dealing with transitions.

What are the types of organizing that Me In Order performs?

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## Macro Vs. Micro Organizing

As you learn more about the world of organizing you will hear references to Macro-Organizing and Micro-Organizing. Today we are going to be digging into those two terms. So, let's find out what Macro-Organizing and Micro-Organizing is.

Organizing projects can be small and they can be big, extremely big. We need to know the \_\_\_\_\_ of our clients project and the \_\_\_\_\_ of their project in order to help us decide if we need Macro-Organizing or Micro-Organizing. Macro-Organizing is defined as organizing on a \_\_\_\_\_ scale. An example would be taking a garage full of items, sorting through them and generally grouping like items together. Micro-Organizing is defined as organizing on a \_\_\_\_\_, more detailed scale. This would be taking the boxes of ribbon from that same garage and now grouping them by color, texture and size. Micro-Organizing refers to the really \_\_\_\_\_ type of organizing and is usually tackled once the Macro-Organizing has been completed.

The majority of most people's organizing projects start with focusing on the bigger picture, the macro, and then moving into the micro. If we are trying to make a \_\_\_\_\_ difference in the space in a \_\_\_\_\_ amount of time then our goal should focus on using the techniques of Macro-Organizing. During this stage, you can make note of the areas in which you want to get more detailed but don't let that derail you from making progress in the bigger picture. More detailed organizing is easy to accomplish when the broader organizing is \_\_\_\_\_. Think about it, it's easier to organize the photos when you know where all of them are, right?

So, how do we \_\_\_\_\_ what to focus on?

If our clients have not organized a space in a long period of time, or ever for that matter, then you will want to begin with \_\_\_\_\_ organizing. With this approach you look at the space as a whole and not the individual parts. This is not a deep dive but a snorkel excursion. When we Macro-Organize we are not concerned with the \_\_\_\_\_ of the project, but with the space as a whole. Take the garage for example. If you have never organized your garage you will want to begin with a Macro approach — begin at the door and work your way around clockwise — making decisions on the items — what to keep, toss, donate and sell and then grouping like items \_\_\_\_\_ within the space. The trick here is not to worry about the contents of the containers at this point, just the items as a whole. In other words, with Macro-Organizing you are not worried about the contents of the box — just the box itself.

When it comes to \_\_\_\_\_ organizing, the approach is concerned with all the dirty details! Remember with Macro organizing you focused on the box as a whole. With Micro organizing we are focusing on what's in the box.

Let's take another look at the box of ribbons from the garage. It is this type of organizing that you would empty the box of ribbons while making decisions on what to keep and toss. Then once you have decided what to keep - you group like items together. When grouping ribbons together you would group them by color, texture, size or however helps you \_\_\_\_\_ and work with the ribbons best.

Most people attempt to Macro and Micro organize at the \_\_\_\_\_ time. While we often do this as Expert Organizers, we do not recommended it for when it's time to assign your clients with organizing work to do on their own. More often than not we have found that this is when organizing projects become overwhelming for our clients. As a general rule, even for you as an Expert Organizer, we recommend tackling any large space in \_\_\_\_\_ stages. The first stage being the Macro stage, and then going back over the space once again with a Micro approach. This way your client doesn't lose focus when you open the box and reveal their cherished high school photo album. We've seen it all too often, the client will want to reminisce through the album and if left alone they would spend the rest of your time together going through the album. If they do this, you'll have to reel them back in and keep them \_\_\_\_\_ on the organizing project. If you leave the clients to their own devices you see them open the album and next thing you know an hour has gone by and no organizing has been accomplished! More often then not, the key to a successful Micro-Organizing session with a client will be keeping them on \_\_\_\_\_.

We have also found that Macro-Organizing makes the biggest \_\_\_\_\_ while Micro-Organizing provides the best \_\_\_\_\_. Typically Micro-Organizing takes longer than Macro-Organizing. So you will want to leave the Micro-Organizing projects for after you have already made the biggest impact with your client through your Macro-Organizing efforts.

This means that if you have two hours left with your client and she announces that her Aunt Jody is coming over for the weekend and will be staying in the guestroom but the guestroom has been used as a catch-all room, then you will probably want to focus the rest of your session on \_\_\_\_\_ organizing the guestroom for her arrival. Then, on the next session – after Aunt Jody has gone home, you can set aside some time to go back through the space and \_\_\_\_\_ organize it for your client.

The last thing you will want to consider when choosing between Macro and Micro-Organizing projects is the amount of time your client is \_\_\_\_\_ providing for the project. If the client is not willing, or does not have the budget to do a deep dive Micro-Organizing session, then don't try to force a Micro-Organizing project into the allotted time. This will make the client feel that you took too long to do the project and in the end you will not have met their expectations.

Finally, a word about \_\_\_\_\_; It is often easy for our clients to become discouraged when they look at the totality of the organizing project. When a client gets discouraged about all the work ahead, remind them that it is important to focus only on what is being worked on right now. Keep them focused on what you have in your \_\_\_\_\_. Sometimes we have even used a paper towel roll to assist us with this point. Have the client look through a paper towel roll to demonstrate to them what they should be focused on – a very narrow portion of the project. This quirky exercise often helps us illustrate the point and sometimes even gets a chuckle from the client – which can be just as important.

You can also illustrate it by asking them that old but wise question.

“How do you eat an elephant? That's right, one bite at a time.”

It's the same thing with an organizing project — just one item at a time. Do that over and over again and before you know it the project will be \_\_\_\_\_.

So there you have it Macro and Micro-Organizing. Once you understand these two fundamental types of organizing, deciding which type to focus on is not challenging. Just remember to think about the goals of the project and the amount of time you have been given for the project to help you determine if you have time for Macro-Organizing or Micro-Organizing.

## The 5 Steps of Organizing

### Introduction:

Arriving at a new client's home and facing a new set of challenges can be overwhelming, even for the seasoned Expert Organizer. The five steps of organizing is a great tool that provides a proven and systemized approach that gives us confidence to successfully tackle any pile!

Once you have discussed the \_\_\_\_\_ of the session with the client you will want to dive right into the 5 steps of organizing.

They Are:

SORT  
DECIDE  
CONTAIN  
LABEL  
MAINTAIN

### **SORT:**

So, let's begin with Sorting. Sorting can be simply defined as "separating into \_\_\_\_\_ of like items."

We accomplish this by separating the client's belongings into categories of \_\_\_\_\_ so that the next steps in the organizing process will be much easier.

Before you can sort though, you will need to create categories to sort into.

If the client is with you, a great way to have them \_\_\_\_\_ is to help you identify the groups that need to be created. If the client is not present, we do our best to create groups for the client to review.

For large projects we will often write the category names on pieces of paper or post-it notes and place them in the area where the sorted items will be categorized. For very large projects you can even use \_\_\_\_\_ with the words "Donate, Sell, Toss, Keep."

Once the categories have been agreed upon, we begin to sort – or – group like items together.

Generally we begin to group like items together by types of use – size – color – and function.

\_\_\_\_\_ can be sorted categorically, alphabetically, numerically and or chronologically.

\_\_\_\_\_ can be sorted by color, size or type.

\_\_\_\_\_ by type, usage, and of course, old ones & new ones.

During this time, we can also separate what we believe may be tossed or shredded, But remember, the client must give the okay for the things that are \_\_\_\_\_ from the home.

Sorting items like this sets the stage for the process of decision-making, by clarifying categories and quantities so the client will have a clearer picture of what they truly have before they move forward to the next step.

Sometimes, when we are sorting into the identified categories we may need more information to properly place the item in the best category. If it is not evident which category an item should be placed into we can ask the client the following questions to help identify the best category:

How is this \_\_\_\_\_?

Does this still work?

Are we \_\_\_\_\_ this?

What group can this be placed in?

This step of the organizing process reveals to the client the obvious groups:

- Items that need to be \_\_\_\_\_ (items that the client believes are rubbish or does not want going to anyone else)
- Items that can be **Donated/Sold** or given away – of course these are items that the client does not want, but are in such good condition that they may be valuable to someone else.
- Items that need to \_\_\_\_\_, whether to a store or a friend or family member.
- Items that **Require Attention**, whether it be repairs or a follow up of some kind.
- Items that hold real value to our clients and will be \_\_\_\_\_ in the home.

You will want to go through this process over and over again with each item until the space that is to be completed that day has been completely sorted. Once this step is complete you can move on to the next step in our 5 steps of organizing.

Remember, sorting is the \_\_\_\_\_ point for our clients. There is much more to be done but if we don't break the project down to simple tasks then the client may still struggle moving forward.

In the next lesson we'll look at the 2<sup>nd</sup> step in organizing which is "decide."

## DECIDE:

Remember, we need to help our clients' sort through their spaces and group like items together so that we can \_\_\_\_\_ them for the next step in Organizing – Decision Making.

The most valuable step the client will take is \_\_\_\_\_ about the items that are being organized to reach the goals that they have established.

Without decisions we may only be \_\_\_\_\_ or \_\_\_\_\_ items. The process of making decisions may be difficult for the client and their inclination may be to have us keep everything and only relocate or rearrange them. This is where our \_\_\_\_\_ comes in as an Expert Organizer. We are decision \_\_\_\_\_ and one of our key roles is to help our clients make decisions. It is our duty to help them make those tough decisions rather than take the high road and just keep everything.

This decision making step may be revisited several times during the organizing project. Typically, as the space begins to get organized and the client sees the progress being made they will begin to second-guess their first decision to keep something. This is a \_\_\_\_\_ step for our client that shows us they are engaged in the process and are beginning to see their future organized self. You will want to encourage this when it becomes present and allow it to happen over and over again throughout the process.

The purpose of this step is to create \_\_\_\_\_ within the space and in the clients mind by identifying and then executing the client's clear directives. The process helps our clients find and sometimes rediscover their favorite items while putting aside the ones that may be questionable and not important or essential.

One of the ways that we facilitate this is to ask specific questions such as:

Will this be used again?

Is it \_\_\_\_\_ the space it takes?

Does it add \_\_\_\_\_ to your life?

...And our favorite

Does it \_\_\_\_\_ the life you want to live?

The things we buy, the items we value, the possessions we hold on to are all reflections of our career, our dreams and ourselves. They may all be great things, but are all the VERY best? We must limit these items so we can actually have time to enjoy and experience them. The items we manage should be \_\_\_\_\_ to achieve dreams, not \_\_\_\_\_ that impede our progress and drain our lives.

We should keep items because of their value to our current situation, not the past, not the financial value they have or have once had, not because they are new or unused. The items we keep should

have \_\_\_\_\_ value or \_\_\_\_\_ value; with all things having good memories. The functional items should be easily accessible and sentimental items, such as keepsakes or memorabilia can be honored by being displayed and preserved.

Remember, clutter stops us from living in the \_\_\_\_\_ and prevents us from moving towards the \_\_\_\_\_.

During the decision making process we want to help the client \_\_\_\_\_ their priorities so we can help them make \_\_\_\_\_ based on those priorities. We do this by getting them to look at and think about their belongings in a new light. Most of the time, we accomplish this just by asking the right questions.

It's important to also bring \_\_\_\_\_ of the cost of keeping items "just in case." We don't generally agree with keeping items "just in case" because clutter costs us in stress, health, relationships, and many other ways and "just in case" is not a good enough reason to allow clutter to dictate our future. You'll want to remind the client that the costs will continue to \_\_\_\_\_ if they don't make decisions on it now.

As we help the client make decisions we can guide them to see ways they can contribute through letting go. Here are some examples:

- Donating – Donating helps charities that could benefit from these items
- Gifting – Giving to those we care about so they can enjoy the item
- Selling – Selling items can help us make money. We can sell the items by taking them to a consignment store, listing them on Craigslist, EBay, Amazon and others, or even selling them in a Garage sale or on the OfferUp app.
- Recycling – Recycling is a great way to reuse the materials and help the environment
- Disposing – Disposing helps us create space by removing items that no longer have value.

It is important to remind our clients that the more \_\_\_\_\_ we have, the more \_\_\_\_\_ it becomes to manage it all. And the more stuff we have to manage the less life we leave for relationships.

Clutter is primarily delayed \_\_\_\_\_. Being a decision facilitator is a critical role that we play as Expert Organizers. To help with our role it is important to understand what keeps our clients from making decisions. Our clients become indecisive because either (1) they don't have enough \_\_\_\_\_ to decide or (2) they don't know \_\_\_\_\_ to decide. By asking questions that help our clients make logical decisions on what to do with their items we are fulfilling our role as decision facilitators. When our clients are indecisive, clutter ensues so we want to help them make the decisions they have had trouble making and also teach them the \_\_\_\_\_ of not having made those decisions.

So, as you can see this step in the organizing process is truly one of the most important in the overall process. And even though it is the second step in the process it may be revisited time and time again during the rest of the organizing process.

## **CONTAIN:**

Contain: to put items away organized

Containing: to keep (something) from \_\_\_\_\_; to keep (something) within limits

This is where we help the items find homes and limits. We ask the client questions like:

- Where would you like to use this?
- Where would you think is a logical place for this?
- \_\_\_\_\_ will be using this?
- How \_\_\_\_\_ do you need this?

The new home/container/system must be both effective & efficient.

Effective: best possible solution for the situation

Efficient: requires a minimum amount of time and effort to maintain

Sometimes containment will be a \_\_\_\_\_ or tool and other times it may be a \_\_\_\_\_ or specific space.

This step may reveal some more items that need decisions due to the \_\_\_\_\_ that have now become evident.

Since there are a wide variety of options within a home and market, it is important that we are continually abreast of \_\_\_\_\_ and \_\_\_\_\_ to suggest to the client. We always try to use what is available in the space before suggesting more accumulation.

## **LABEL:**

Label: to communicate, inform, and teach through \_\_\_\_\_.

The step of Labeling is many times overlooked when items are obvious. However, the value of identification of an item's location can serve several purposes:

- Inform of a new \_\_\_\_\_.
- Create a \_\_\_\_\_ for other items to not end up in this location.
- Reserve a home for an item that needs to be put back after \_\_\_\_\_.

- Make it possible for others to be \_\_\_\_\_ in the putting away process.

Using \_\_\_\_\_ labels will ensure that you don't damage valuable irreplaceable finishes. If you are unsure, use a post-it note.

Permanent labels are used once the systems have been \_\_\_\_\_ and have \_\_\_\_\_ to be right for the client. You will want to ensure that you have client buy-in and approval before you adhere permanent labels during your session. You will also want to be mindful of the appearance and usefulness of the label.

\_\_\_\_\_ and \_\_\_\_\_ is key!! You want to make sure that the client knows what it is and where it is and also that it is easy to get to. Using clear bins and/or labeling are key. If you need to create a master list of where things are you can do that as well.

## **MAINTAIN:**

Maintain: to keep the systems functioning over time

For this step to be taken by the client we must determine with them:

- When to organize – triggers and \_\_\_\_\_
- When to rework the system – Monthly, annually, during the next transition
- How to stay on track – Backsliding
- How to keep track of projects – future master and \_\_\_\_\_ lists

Most clients often need ongoing \_\_\_\_\_, evaluation, follow-up and \_\_\_\_\_ to cement the process of organizing.

We aim to transfer skills by \_\_\_\_\_ the clients to sustain the order we have created by:

- \_\_\_\_\_ organizing practices and methods – showing the clients the steps taken during the project.
- Discussing the client's current/future \_\_\_\_\_ and ways to overcome them.
- Giving solutions based on the client learning style.
- Collaborating with the client by providing \_\_\_\_\_ through progress reports and/or photos sent to you as they complete tasks.

## Organizing Terms and Principles

### Assessment

- Evaluation of a person's situation and plan for a solution.

### Assigning a Home

- The location an item has. It should be based on the right size, function, logical location, accessibility and frequency of use.

### Clutter

- Confused or disordered state
- A lack of order or regular arrangement
- Delayed decisions

### Confidentiality

- Keeping the identity of the client, the work & anything the client says or does a secret unless the client consents to allow disclosure.

### Consultation

- Evaluation of a person's needs and circumstances surrounding those needs.

### Deciding / Decision Making

- The cognitive process of making decisions

### Document Retention Policy

- How long documents are kept

### Effectiveness

- A measure of how well something works

### Efficiency

- Accomplishing something the best way possible, usually with a minimum expenditure of time and effort

### Endowment Effect

- In behavioral finance, the **endowment effect** describes a circumstance in which an individual values an item they already own more than an item that they do not yet own.

## Executive Dysfunction

- A learning difference inhibiting cognitive processes that are used to perform tasks. Some of the indications are difficulty with sequencing, setting goals and priorities, managing time, self-regulating & beginning/completing tasks.

## Function

- To perform a specified action or activity
- We as EO's become function & usability experts since all of our solutions hinge upon whether our recommendations work.

## Learning Styles

- Visual – they need demonstrations, descriptions, use lists, labels, pictures, colors
- Auditory – verbal instructions, learns by listening and discussing. Uses timers, alarms, music, voice messages
- Kinesthetic (aka Tactile) – they want to be involved, rather than listen. They need to perform the actions to reinforce the concept. They write down, draw or touch what they need to learn.

## Left Brain Characteristics

- Needs detail first to understand
- Makes lists
- Processes math & language symbolically
- Uses logic to find answers
- Expresses self in words
- Follows rules
- Deals with the way things are

## Right Brain Characteristics

- Needs whole picture first to understand how details work together
- Uses color to learn sequence
- Needs to feel, touch or see to visualize it
- May know answer by gut feeling and work backward
- Nonverbal expression, has trouble expressing what they mean
- Changes the ways things are; breaks rules

## Letting Go

- Parting with items
- The emotional release clients experience after items are purged

- EO's ask pointed questions about the meaning, value & purpose of kept items, encouraging them to change how they relate to the objects.

## **Liability Insurance**

- Protects an individual or company if sued by a 3<sup>rd</sup> party for any named reason.

## **Organizing Obstacles**

- Technical errors – simple, mechanical mistakes that can be easily fixed
- External realities – circumstances beyond the client's control
- Psychological obstacles – the thoughts and beliefs that keep them from getting organized.

## **Pareto Principle**

- 80/20 rule
- 20% of your efforts produce 80% of your results
- 20% of the people you know provide you with 80% of nurturing support
- 20% of our clothes we wear 80% of the time.
- 80% of the papers in our files are only accessed 20% of the time

## **Parkinson's Law**

- Work expands to fill the time available for its completion. Tasks with end dates rarely finish early because we expand work to finish approximately at the end date.
- No matter how much time, space or money people have, they will expand their needs to use it up.

## **Prioritizing**

- Putting things in order of importance

## **Purging/Editing**

- The removal of items from a space or activities from a calendar

## **Peter Principle**

- People tend to take on more activities, more responsibility & more work until they are no longer effective

## **Service Aptitude**

- A person's ability to recognize opportunities to exceed a customer's expectations, regardless of the circumstances. We learn service aptitude from

- 1) Previous life experiences
- 2) Previous work experiences
- 3) Current work experiences

## **SMART Goals**

- Specific
- Measureable
- Attainable
- Realistic
- Time dimensional

## **Sorting**

- Arranging anything to a class, kind, type or size
- Grouping like items together

## **Space Design**

- Preparing plans for the best use of the space
- Purpose = Why
- Layout = Where
- Function = How
- Form = What
- Style is personal preferences

## **Sunk Cost Fallacy**

- When a person continues a behavior or endeavor as a result of previously invested resources (time, money or effort).

## **Transfer of Skills**

- When clients, students, class attendees and others apply what they have learned.
- Methods include: lectures, photo examples, guided discussions, case studies, role playing, demonstration, simulation, apprenticeship and training.

### Notes:

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