

# Operation Organization

### Don't wait for spring to make a clean sweep of your working environment!

If someone peered into your car, file cabinets, kitchen pantry, laundry room or closet, what would they assume about you? Would they guess that you are always in a hurry, loaded down with too much stuff and barely holding your act together in the public eye? Or would they think that you are organized, thoughtful about your life, unstressed and living unencumbered?

In the last column, we explored the idea of creating systems to make your life and work run more smoothly. For the personal trainer, wellness coach or facility manager, the task of creating systems can be divided into two general categories: practice management and client management. In this and the next issue, we will focus on practice management. Be ready to get your hands dirty and your brow sweaty this month—you will be cleaning out, throwing out and beginning the process of organizing!

### How Do I Start?

The ultimate goal is to get your office space cleaned out so it is ready for logical organization. But your entire physical space may need a ruthless hand, especially if you have an in-home office. Following is the smart way to sift through a room.

**Start With Three Containers.** Set out three big bags or boxes, and label them “Keep,” “Throw Away” and “Give Away”—and start getting rid of unnecessary items. You can live with much less than you think.

**Schedule Clean-Out Time.** Covering a whole room in one day can be very tiring.

If the prospect of spending an entire Saturday clearing out your office is depressing, set aside 30–60 minutes every day for a week. Write this time in your schedule. Once you get started, set a timer—when it goes off, you are done for the day.

**Sift Through Your Files.** Go through your client files and educational materials. I generally keep assessments and other data for inactive clients for 5–7 years before shredding everything. For active clients (those who train at least twice a year), I keep assessment data and workout logs as long as the clients continue training.

Since most educational materials can now be accessed online, I no longer pull and save articles unless I am currently implementing the advice in those articles. “Use it now or toss it” is my rule.

### What's the Next Step?

This is the fun part. You get to create a system that makes sense to you. Following are some basic organizing ideas to set you on your way to structuring a system that works effectively.

**Create a Functional Space.** How can you reorganize or divide your space so that it makes sense to you? I was sharing a home office with my husband until I grew mentally weary of the piles and boxes I could do nothing about. We both needed a space of our own. I carefully went through my files and articles and freed myself from the overwhelming paper burden. I bought a computer armoire and a new phone and moved my office—computer, printer, files and all—into the guest bedroom. I love my

office now. I can shut the door, conduct coaching sessions, create speeches or write articles in a space that works for me.

- ★ Make sure the things you need to get to (files, printer, copier, etc.) are in easy reach. Make everything flow.
- ★ Be sure you have proper lighting. Put your desk near a window where you can look out (though not right in front of or directly across from a window, where glare could be a problem), or get a great desk lamp.
- ★ Put music in your space. Music is inspiring. Enjoy it when you need the inspiration or calm.

**Evaluate Your Equipment.** When I moved my office to another room, I re-evaluated the equipment I had or needed. What would make *your* job easier and more organized?

- ★ Update your computer. Have your programs (Word, Adobe Acrobat®, Excel®, Publisher, etc.) been updated in the last 2–3 years so that you can share data with others?
- ★ Make sure your phone is “functional.” Is it cordless? Do you need a mute button, speed dialing, a speaker phone, voice mail or hands-free headset?
- ★ Get a reliable Internet service. I use Yahoo! to check my e-mail from anywhere—and store files too.
- ★ Buy a good printer. Great multifunction machines (color printers/scanners/copiers/faxers) are so inexpensive now (\$99–\$199)!
- ★ Make sure your desk works for you. Does it hold what it needs to? If not,

shop for a new or used one that fits your needs perfectly.

- \* Get a comfortable chair. You undoubtedly lecture clients about their posture and ergonomics. What about yours?
- \* Re-evaluate your filing system. Although I keep clients' files on my computer, I also like paper copies of their programs and assessments. Nevertheless, I was able to go from a huge four-drawer legal file to a two-drawer standard file cabinet, and I felt better immediately.

#### **Start Filing.**

- \* Divide your client/customer files into active and inactive. How many folders do you need? Choose a different-color folder or label for inactive clients. Keep only the things you need in your client files. (After a while, I had started getting rid of cards and notes I knew I could live without.)
- \* Create folders for several of the fol-

lowing areas: business goals, personal goals, business budget, client forms (a folder for each form you use), contacts/referrals, CEC information, information on upcoming conferences and training, etc.

- \* Organize your files in a way that makes sense to you; what you use most should be most accessible. Color coding can make things easy (making client files one color, business files another color, etc.).
- \* As you file, mark—on a business calendar or in your handheld computer—reminders for important dates: due dates for continuing education credits, client birthdays, training anniversaries, conferences, etc.

**Create a “Redo” Box or File.** As you go through your files, throw into your “Redo” box a copy of any form that needs to be overhauled or updated.

## **Mission Accomplished**

Cleaning out all your physical spaces and starting fresh requires a lot of physical energy and mental presence. It is often best tackled over 2–4 weeks. Breaking the job down into smaller chunks makes it less overwhelming and gives you a feeling of accomplishment every day. Although we have just begun the yearlong process of creating synergistic systems, you will be well on your way after accomplishing all the “homework” from this issue. Get this dirty work behind you before our next issue. And don't forget to celebrate when you are done!

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## **ORGANIZATION CHECKLIST AND SHOPPING GUIDE**

1. Make a list of every space you intend to clean out (office, car, closets, etc.).
2. Schedule a date (or dates) to clean out each space. Enter the date(s) on your calendar.
3. Get three boxes or bags and label them “Keep,” “Throw Away” and “Give Away.”
4. Get started. Complete one space at a time. After you have cleaned out your office, organize it before you move on to the next room. View each space as a separate project.
5. Sift ruthlessly through your files. Ask yourself, “Do I really need this?”
6. Create your “Redo” pile.
7. Enter reminders on your calendar or handheld computer.
8. Make an equipment wish list. Include money in your budget for the things you want.
9. Decide what needs to go where. Be sure the order is logical *to you*.
10. List folder headings, and then count the number of folders you'll need.
11. Go shopping for file folders, labels, dividers, etc.
12. Complete your filing.
13. Celebrate!