

## Organizing to Succeed

03/27/06

This week's question comes from an entrepreneur who's taking her work experience and turning that into her own business. She writes, I'm exploring my passion for business, and am very excited about it. I've been working for other people for 10 years, and think it's time I go out on my own. One big problem concerns me. I'm not very organized. It seems like things get scattered very easily, and I can lose track of where I am. What do you suggest I do to deal with this problem?

You're not alone, by any means. Keeping a handle on everything that is going on in the business can be tough for a business owner at any stage. Lots of owners have gained valuable experience, as they worked through losing, and recovering control over what's happening in the business.

There are some things you can do to make things easier for yourself. Let's look at the roles of space, schedule, systems and routines, priorities, and reasonable promises. Each of these can make a big difference as you work through your day.

Sometimes days fly by effortlessly, and other days it can feel like you're walking through a minefield. How you handle the challenges of the day will make a difference in how you feel at the end of the day. If you're like most business owners, you will often be dealing with things that can

drive your plans off track. Keeping your perspective, putting a smile on your face, and remembering that only so much can get done in one day, can help you get through almost anything.

Let's start by looking at work space. Set up your office with an eye to function. If you can, have multiple work spaces. Set up separate cabinets, or areas within cabinets for filing different functions, such as finance records, sales folders, operational and database items, marketing projects, and personnel documents. Do the same with files on your computer. It will be easier to flip through folders, later on, if you're looking for specific information.

Clear off desk space as much as possible. Many people try to keep folders in sight on their desks, fearing that if they put them into a drawer, they will lose track. Clearing space to work and reducing clutter will help you to stay focused, and probably cut down on the feeling that you've lost something somewhere on your desk.

Plan out when you expect to work on things, then put them away until you need them. As you are filing things away, log "to-do's" into your calendar, with a note on where you filed the information you'll need. Many organizers recommend you try color coding your files, to help your eyes keep track of what goes where.

At the end of each day, take 15 minutes to wrap up. Clear off everything that's on your desk, again putting ticklers and "to-do's" in your calendar, as you file things away. Make a list of what you'll have to deal the next morning. Leave that list right on top of your desk, where it will be the first thing you see when you return to the office.

Take a look at how you best function during the day. Is it easier for you to sit quietly when you first get in, or do you need to be up and walking around, checking on things? When do you do best on the phone? When do you find you get your best results from prospecting calls? When do you do your best writing?

Most owners have to do lots of things during the day. The challenge is trying to do each one of them well. Your best bet is to split things up, with breaks in-between, and extra time to allow for the stuff that just pops up. Leave some time in the day for thinking, reflecting and planning.

Much of what you do can be planned out in a routine. You have to send and return emails, make calls to customers and vendors, do some follow up, deal with bookkeeping and other financial issues, handle questions, give direction to employees, and work on marketing efforts, to name a few. Organize daily, weekly and

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monthly blocks of time which you can devote to specific functions.

Go to your calendar and block out your time. That can help you see the demands you have to deal with. Reserve a portion of the same day each week to handle specific activities, such as new business, bill paying and customer invoicing. Work on big activities in longer timeframes, such as marketing campaigns, and product development. Plan meetings with employees and vendors, and keep a list of what you want to talk about, so that you use your time well. Make sure your employees know when you are available, and how to get a-hold of you. It is also helpful if you let people know what you consider to be an emergency – and what sorts of things can wait for later.

Build as many systems and routine practices into the business as possible. If you and everyone who supports you know how things are done, it is much easier to get in the groove and “just do it”. Have a routine for handling customer service requests, and another for bringing on new customers, for example.

Be specific about where things go: from pens, hole punches and copy paper, to incoming and outgoing mail. Teach yourself and your employees the discipline of finishing up and putting things away. Show new employees where things go. You’d be

amazed how much time in the day you can recover, if you can eliminate the need to look for things.

Be clear about your priorities. Know the difference between something that is important and something that is just noise. Focus on progress. Make a list of your top 10 priorities, and measure each activity demand against that list. If something doesn’t rank on the priority list, you probably don’t want to spend much time and effort on it. Top 10 priorities should include contributions such as sales, cash flow, improving products or services, managing and training, and building brand equity.

Be careful about the demands on your time and energy. You can’t do everything, so be realistic. Only promise to do what you really can. It is often tempting to tell someone that you will be getting back to them shortly, or that you’ll look into something, when the reality is, it is so far down on the priority list, that it won’t be happening anytime soon.

When asking others to follow up with you, be specific as to when, and how, you want them to follow up. Try to communicate with employees and vendors more by email, and ask your people to do the same with you. It is a great medium to use to organize thoughts, communicate when you have time available, and allow

others to do the same. It also provides a good trail, which you can follow up on.

Take a look at how your work week is going. Do you have enough 1, 2, and 3 priority activities – sales, cash flow and product or service quality - scheduled every day? Is every day a blur? If so, how can you delegate some of the activities that are taking up your time, so that you have more time to focus on your top items. Do you have enough down time, and spare time to handle the variety of things that come up?

If things feel out of whack, don’t be afraid to stop what you’re doing and call a time out. Sometimes it just takes a half hour of re-organizing your desk, or going for a walk around the block, to help you get back in control. Remember, it isn’t healthy to function at a high adrenaline rate all day long.

Finally, you need to be able to give your brain and your body time to relax and enjoy the fruits of all that you are accomplishing. Keep a log of accomplishments with you, and add to it throughout the day. Review it before you go home. Print out your to-do list and check off what’s done, to reflect on how the day was spent. When you feel like you’re getting behind, ask yourself what you need to change around on your schedule, or what you can delegate to others, in order to get



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though the list in a reasonable amount of time. Give yourself credit for keeping things moving and for everything that you are getting done. Reflect on what those accomplishments are worth to the business long term.

Looking for a good book? Try *Organizing From the Inside Out*, by Julie Morganstern.

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