

KW FreeSkool
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“Organizing isn’t about being overly disciplined. It’s about being structured just enough so that you can find anything within three minutes.”

- Deb Allert

GET ORGANIZED

Week 4: Electronic Organization

Philosophy

- Organizing is about identifying what's important to you and making it more accessible. - Julie Morgenstern
- Not “one-size-fits-all” – there's no “right” system, just the right system for you.
 - “Outside in” vs “inside out”
- “Organize to the point where you bring serenity into your life. That's rarely achieved by perfectionism.” - Deb Allert

The Organizing Process

Julie Morgenstern

- Analyze
- Strategize
- Attack
 - Sort
 - Purge
 - Assign a home
 - Containerize
 - Equalize

Marilyn Bohn

- Searchlight
- Spotlight
- Green Light

Regina Leeds

- Eliminate
- Categorize
- Organize

Workshop Structure

- Review
- Analyze
 - ▣ Causes of clutter
 - ▣ Work time
- Strategize
 - ▣ Review process
 - ▣ Computer file management
 - ▣ Email management
 - ▣ Time management & other tools
- Attack
 - ▣ Work time

Free organizing help!

2 or more workshops = 2 hours of help

Details/Restrictions:

- Less than half an hour from my home on the GRT bus system.
- The hours can be consultation or hands-on, spent on either time, money, or stuff/space.
- Roommates can combine hours.

In return:

- Feedback, before/after shots, testimonial, permission to talk about the experience or use examples in my work.

So far...

- **Analyze**
 - ▣ What isn't working & why?
 - ▣ Common causes of clutter
- **Strategize**
 - ▣ Kindergarten model of organizing
 - ▣ Define zones, map out your space
- **Attack**
 - ▣ **S**ort
 - ▣ **P**urge
 - ▣ **A**ssign a home
 - ▣ **C**ontainerize
 - ▣ **E**qualize

Review: Causes of Clutter

Technical errors

- Items have no home
- Confusing system
- Inconvenient storage
- Out of sight, out of mind
- Organizing is boring

External realities

- Limited space
- Uncooperative partners
- In transition
- Unrealistic workload

Psychological Barriers

- Need for abundance
- Need for chaos to 'conquer'
- Unclear goals
- Need to retreat
- Need for distraction
- Dislike the space
- Sentimental attachment
- Need for perfection
- Fear of losing creativity

Analyze

1. What's working? (or partly working)
2. What's not working?
3. What items, areas, or activities are most essential / important to you?
4. Why do you want to get organized?
5. What's causing the problems?
What hasn't worked in the past?

Do it now: 10 minutes, then report back

Strategize

1. Review: Kindergarten Model
2. Review: the “attack” phase
3. Tips & techniques

Review: the model

Kindergarten model of organizing:

1. Room divided into activity zones.
2. Easy to focus on one activity at a time.
3. Items stored at their point of use.
4. Everything has a home & it's fun to put things away.
5. Visual menu of everything that's important.

My key points:

- Group like items.
- Put things where you use them.
- Make it appealing.

Review: the process



A. Define Zones

Activity Zones | Supplies | Storage Unit

B. Map out the space

1. Plan around your natural **habits**.
2. Think about the **relationship** between activities.
3. Categorize spaces: **premium** (daily use), **secondary** (weekly use), **semi-storage** (seasonal), and **hard-core storage**.

Review: Attack

1. **S**ort
2. **P**urge
3. **A**ssign a home
4. **C**ontainerize
5. **E**qualize

“Organize to the point where you bring serenity into your life. That’s rarely achieved by perfectionism.” - Deb Allert

Attack: Sort

Identifying what you have and placing it into categories.

The “keep” test – for each item, ask:

- ▣ Do I **use** this?
- ▣ Do I **love** this?
- ▣ Do I **need** this? (be very careful about answering this one!)
- ▣ What **category** does this belong in?

While sorting, focus on:

- Identifying what's important to you
 - ▣ Based on your analysis
 - ▣ What you currently use/love/need
- Grouping similar items
 - ▣ Place things together based on how *you* associate things
 - ▣ Fewer categories = easier to maintain

Attack: Purge (de-cluttering)

Make a decision about everything you've sorted. Be ruthless

- Review & “keep-test” everything you've sorted.
- Hesitant? Organize what you've got & pare down later.

Attack: Assign a home

Decide exactly where to keep everything.

- ▣ Make sure it will be *intuitive* for you to both find things and put them away.
- ▣ Choose one system for consistency.
- ▣ Don't mix categories in one storage unit.
- ▣ Premium, secondary, semi-storage, and hard-core storage spaces.

Attack: Containerize



Put items in appropriate containers to improve retrieval and return.

Attack: Equalize

- Make regular maintenance routine.
 - ▣ Tidying won't take as long now that things have a place to go.
- Evaluate regularly until you're happy with things.
- Adjust when needs, possessions, or priorities change.

Electronic Organizing

1. Overall functionality
2. File management
3. Email management
4. Time management tools
5. Other helpful tools/software

Overall functionality

- Experiment and explore!
- Learn your way around your computer, especially:
 - Your dock/taskbar/start menu
 - Window sidebar shortcuts/favourites
 - Different ways of launching applications/files
 - [Keyboard shortcuts](#)
 - Different window/folder views
- Check out software to enhance your computer

File Management

- Piles happen for two main reasons:
 - ▣ You don't have the right files set up.
 - ▣ You have the files but don't put things away.

Filing Systems – key points:

- ▣ Three steps: Inbox, Active files, Archived files
- ▣ Categorize/title files based on retrieval – where will you look for it?
- ▣ Don't over-categorize or have conflicting categories.
- ▣ One category per unit (file).
- ▣ Prepare for emergencies.

Computer file management

- Treat your 'downloads' folder and desktop as an inbox.
- File as you go.

Folder structure

- Have one central location for all your documents, with folders/subfolders.
- But also separate ongoing work from completed
 - ▣ "Not in use" or "old" archive folders.
 - ▣ Consider a 'current' or 'active' folder for stuff you use most.
 - ▣ Or use shortcuts/favourites so you still maintain your overall file structure.

Categorizing / naming

- Unique and accurately descriptive
- Avoid overfilling folders
- Use abbreviations
- Macs: use colour labels to categorize or highlight priority files
- Force priority files to the top of the list with prefixes

- Choose an 'active files' location
- Come up with some categories

Purging: questions to ask

- ▣ Do I want it? Do I need it?
- ▣ Will it add something new?
- ▣ Is it significant for my purposes?
- ▣ Do I foresee a use for it?
- ▣ Is it timely? Is it quality?
- ▣ Is it accurate and reliable?
- ▣ Is it easy to understand?
- ▣ Can I obtain it elsewhere? (e.g. online)

Email management

- You don't have to respond right away
 - ▣ But you do need to remember to respond later
- Use labels/folders and set up filters
 - ▣ Try a 'mailing list' label/filter

Gmail

- Compact view
- Priority inbox(es)
- Priority inbox combined with labels
- Labs: 'Send & archive', 'Message sneak peek'
- Use Tasks to create to-do items connected to specific messages
- Hide/show labels

- **Set up a priority inbox.**
- **Plan/set up some labels.**
- **List addresses for mailing list filter.**
- **Enable some labs.**

Time Management

- Make use of 'create task' or 'create event' functions in applications
- Apply concepts from Week 1 to your electronic/online calendars
- Colour-coding!
- Try [time-tracking applications](#)
- iPhone: "Week Cal" app

- Learn how to use 'create task/event' functions
- Create/apply categories

Helpful tools

- Clipboard enhancement: [Jumpcut](#) or [Ditto](#)
- Google Docs
- Evernote
 - ▣ For syncing notes/info AND for saving things to [read offline](#)
- Password storage: [1Password](#) or [Moxier Wallet](#)
- iTunes, iPhoto, etc
 - ▣ [TuneUp](#) to fill in missing song info
- Library software: [Delicious Library](#) or [Billmonk.com](#)

Work time

If you brought your computer:

- Work on a filing system
- Create email filters/labels
- Play with Google Docs, Evernote, Moxier...

Alternate activities

- Work on **Analyze** or **Strategize** phase
 - Brainstorm folders/categories
- Make a **plan of attack**

Prep for next session

Bring:

- Laptop, if you can
- Bank/credit card online banking info
- Spending data you've been collecting

Resources

www.OnlineOrganizing.com | www.unclutterer.com

[Organizing Your Electronic Files](#)

[Online Organizing newsletter: Overcoming Information Overload](#)

[OO newsletter: Advanced Paper And Electronic Management Systems](#)

[OO newsletter: Information Organization](#)

[15-Minute Organizing Ideas -- Techie Tasks](#)

Email

<http://unclutterer.com/2010/03/06/using-a-three-folder-system-to-keep-e-mail-under-control/>

<http://unclutterer.com/2012/03/16/ask-unclutterer-to-check-or-not-check-email-first-thing-at-work/>

<http://mashable.com/2012/02/09/boomerang-email-infographic/>

<http://unclutterer.com/2009/12/15/cure-your-e-mail-addiction/>