

# ORGANIZE TO OPTIMIZE

## Part 2 Implementation Exercise

### Let's Put Processes Into Place!

Now that you've organized an area and made it fully functional, we are going to work on putting processes into place to make staying organized a part of your everyday.



### Before You Start!

If you are feeling overwhelmed, stuck, or looking for some guidance, send us a note at [info@itssimplyplaced.com](mailto:info@itssimplyplaced.com). We are here to help you find the solutions that work best for you!

**Now, let's get intentional about process setting!**



# PUTTING PROCESS INTO PLACE



## 1. MAKE 1 OF 5 DECISIONS CARDS

Print/Create a Make 1 of 5 Decisions reminder card (these are part of the Task Master Library resources, or you can create your own using the details from the video). Post it prominently where you process mail, paperwork, email, etc.



## 2. MAKE THE COMMITMENT

Commit to processing, not checking current items in your physical inbox, email inbox, mailbox, desktop, counters or surfaces. If there's a backlog that you need to process and "catch up" on, schedule some blocks of time for processing.



## 3. CREATE OR REFINE YOUR REFERENCE FILING SYSTEM

- Clean out your current system (use the SPACE process we learned in Part 1).
- Brainstorm categories or files needed and set up your system based on the recommendations in the course video. Define large categories, sub categories, and your naming convention.
- File papers, emails or items for reference that don't need action but that you want to maintain for future reference.



## 4. CREATE OR REFINE YOUR ACTION MANAGEMENT SYSTEM

- Set up a a tickler system, a categorical system, an app, software or cloud-based system. Or, use your calendar with a corresponding electronic and physical file to hold the paper, records or items the calendar entry represents.
- Capture current to-dos in your new action management system.
- File electronic or paper items that represent "tasks" into your action management system and ensure you'll be triggered by the system to act at the appropriate time. Set calendar reminders, app reminders, establish habits to review a tickler system daily, etc.



# TAKE SOME NOTES

Use this sheet to jot down your thoughts from steps 3 & 4. Revisit these notes and write down any additional follow up tasks.

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