# Get organized once and for all

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# Disorganization could be weighing down your business

Are you working hard to grow your business but feel like you're not getting anywhere? Do you often find yourself questioning your ability and wondering if the latest business success audiobook will magically solve all your problems—assuming you can find uninterrupted time to listen to it?

Before you start looking for the latest audiobook filled with outrageous promises—"Make millions of dollars overnight,"—or begin questioning your ability to run a successful business, the real question you should ask yourself is if you're running your business as efficiently as you could be.

## Clutter affects business success

Many times organization is often overlooked by business owners. Have you ever stopped to think about the clutter and inefficiencies that may be getting in your way and preventing your business from growing to its fullest potential?

Lack of organization not only results in measurable losses, like lost time and money, it negatively affects your business reputation, adds a significant amount of stress to your life, and makes it difficult for you to work efficiently. Researchers at Princeton University conducted a study and found that clutter can actually make it more difficult to focus on a particular task. Specifically, they found that the visual area can be overwhelmed by objects that are irrelevant to the task which gets in the way of completing it efficiently.

Organization isn't the first thing many business owners think about when they're frustrated with the lack of business growth. Or, maybe you're aware of some areas that could use some sprucing up, but making changes and decluttering takes time. The thought of it alone can be overwhelming for sure. In the moment, it's easier to tuck the thought away in the back of your mind in the "I'll get to it someday" corner and try to make the best with what you've got.

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But did you ever stop to think about the amount of time you'd save just by getting organized? A study conducted by Express Employment Professionals found that out of 18,000 business leaders, 57 percent said they lose six working hours per week as a result of disorganization.

Taking the time to get your business organized will not only help you save time in the long run, but it will also help you breathe easier, lower your stress levels, and play a significant role in growing your business.

So you may be wondering how you can get started. Read on to find out how you can get your business organized and start seeing the growth you've been working hard for (without having to work so hard for it).

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# What causes disorganization and how to fix it

Before you get your broom and dustpan out, the first thing you'll want to do is understand why you're disorganized. While we can't pinpoint the exact reason why your office is cluttered or why your business isn't producing the level of growth you're after, we can share some tips and point out some common behaviors among people with cluttered offices.

### People who view possessions as a type of security

For some, it boils down to a matter of scarcity. They view their "stuff" as a type of security against change. Even worthless items like way too many pens or a mountain of unopened junk mail stacked high on the corner of the desk creates a barrier against scarcity.

### People who hate making decisions

People who hate to make decisions would rather put off making a decision as long as they can. Of course, there are things they can't put off, like paying bills or filing taxes, but in areas they can fully control, like going through that pile of junk mail and making the decision to toss it, they prefer to put it off as long as they can.

### People who struggle with time management

These people want things like a clean, uncluttered space. They dream of it! The problem is, they struggle with managing their time and can never get around to those chores they know will help them get organized.

## Can you relate to any of these behaviors?

Are you a "pack rat"? Do you put off making decisions? Or, do you find yourself wishing for more hours in the day so you can get to everything you want to do? Not sure?

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Here are some questions you can ask yourself to determine what's causing disorganization and clutter in your business.

1.  How does my workspace make me feel?

2.  People with clean workspaces are ...?

3.  My workspace would be clean if I only had more (time/money/space)?

4.  Cluttered workspaces are OK when ...?

5.  How do I get most of my work done (paper or paperless)?

6.  What are some ways I can go from paper to paperless?

7.  How does throwing stuff away make me feel?

Clutter doesn't magically appear overnight. It's the result of an underlying reason. Answering these questions can help you identify the underlying cause of clutter and disorganization which may be preventing you from growing your business to its fullest potential.

OK, now it's time to get out the broom and dustpan and tackle a few simple things that'll go a long way in helping you save time, reduce stress, and increase your productivity. Don't worry, we'll start small so it's not overwhelming.

## Organization tips

### Tip 1: Clear your main workspace

This is a great place to start if you don't know where to begin. Clean off your main workspace.

•   Go through papers, mail, coffee mugs, whatever you have lying around in that space.

•   Give it a good wipe down with a cleaner, and start fresh.

When the surface is clean, it'll start to give you a sense of instant organization. Plus, it'll subconsciously allow you to think clearly.

**Bonus tip:** If you're feeling overambitious and want to organize your entire office, consider using vertical storage to maximize productivity throughout your day.

### Tip 2: Clean out your bag

If you use a laptop bag or a tote bag to meet with your clients, take a few minutes to give it a good cleaning.

Take everything out and give it a good shake to remove any crumpled gum wrappers or receipts. Go through all the items and get rid of anything you've been carrying around that you no longer need and then put anything you decide to keep back in the bag.

This will help you feel less stressed the next time you reach into it— say at your next meeting with a potential client—and make it easy for you to find what you need right away.

### Tip 3: Always store things in the same place

Do you often run around looking for your keys or your phone? If you're the type of person who tosses things aside without thinking where you're putting them, you're probably misplacing things all the time and wasting valuable time trying to find them. This is easy to fix.

Start designating a place where you'll be placing an item all the time. For example, if you're always looking for your keys as you're rushing out the door to a client appointment, designate a place where you'll put your keys, like a desk drawer or key hanger located in a spot that's conveniently located on your way out the door. Just imagine, you'll never have to waste time looking for things.

### Tip 4: Organize your time

Do you feel like your days fly by, and you barely got anything done? You're probably spending a lot of time on things that draw you in and suck up a couple of hours without you even realizing how quickly the time has gone by.

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- Start by getting a clear idea of where you're spending your time. Use a time tracking app to record what you're doing for a week.

- At the end of the week, review your records, see how you're spending most of your time and pinpoint the "time-sucking culprits." (Social media and YouTube videos are some of the biggest culprits.)

Start scheduling your days to keep you on track. If you have multiple calendars, merge them all into one to reduce confusion and missed appointments.

### Tip 5: Plan ahead for the next day

As a small business owner, you're most likely running from one thing to the next daily. The best way to avoid getting bogged down with distractions is to plan ahead.

- At the end of your workday take a couple minutes to jot down (on paper or in a free reminder app, whatever works best for you) the most important things you want to complete the next day.

- The next morning, take a look at your plan for the day and stay focused on getting those things done.

- Don't forget to plan for Monday at the end of your day on Friday so you can start on track and never have to try to remember what you were working on last Friday.

Yes, distractions are the norm, but when you have a list to go back to throughout the day, it helps you stay focused even after you've been derailed with a fire drill.

**Bonus tip:** Plan out other tasks to save time during the most stressful times of your day—pick out your outfit for the next day and pack your lunch the night before. This will help you feel in control and more organized. Plus, you'll be a lot less likely to be late for an early morning appointment with a client.

Beyond organizing your physical space and your day, there are more aspects of your business which can be organized to make your business operation productive from start to finish.

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# 5 reasons your small business is in a rut

Disorganization slows down business growth, but other reasons could also be getting in your way.

Getting organized is rewarding in so many ways. Once you start feeling the emotional toll of clutter fading away, it's hard to stop.

After you've kicked your organization and decluttering efforts into full swing, you'll want to get into the weeds and organize the rest of your business —from generating leads to providing after-sales service—so you can successfully grow your business.

As a small business owner you know there's a lot of information that gets collected, used, and stored when running a business. You probably also know that keeping track of all that information is a full-time job if it's not organized. And if that's not enough, there's also the possibility of putting your business at risk by violating strict privacy and data security rules without even realizing you're doing it.

The good news is there are many things you can do to get your business information organized. Here are a few more tips.

## Organization tips

### Tip 1: Organize your computer

Just like we talked about cleaning up your physical workspace, your digital workspace should be clean so you can work efficiently.

- First things first, give your physical computer a good cleaning. Dust off your keyboard, disinfect your mouse, and wipe off all the smudges on your screen with a microfiber cloth.
- Clean your desktop:

  - Remove old files and folders you no longer need.

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- Go through your trash (Mac) or recycle bin (PC) and delete files you're sure you'll never need to save storage space.

- Organize your desktop in a way that works best for you. (Right-click on your desktop to see all the filtering options available, including auto arrange.)

- Choose a desktop that puts a smile on your face or keeps you motivated throughout the day.

- Go through folders on your desktop, other drives, and your downloads folder on your computer and clean those out. You'll be surprised how much stuff you've collected over time that can go to the trash bin. Get rid of any duplicate files and don't forget to back into your trash or recycle bin and permanently delete the files from there, too.

- Get rid of outdated or unused programs on your computer. If you use a Mac, go through all your installed programs from your applications folder. Just drag them into your trash or right-click and select the "move to trash" option. If you're on a PC, go to your settings and into the apps and features section and uninstall the programs you no longer need by selecting "uninstall" for each program.

- Clean up your photos. If you have a lot, consider a cloud storage service like Google Photos or iCloud to free up storage space on your computer.

### Tip 2: Take control of your email inbox

Like most people these days, your email inbox is probably full of unread emails which can be a stressful time waster if you go through a full inbox every few days. Follow these steps to clean up your inbox and keep it under control:

- Build a filing system by creating folders for each "big" category (e.g., customer service, accounts payable, vendors, etc.). You can create sub-folders if you need to narrow down the categories.

- Go through your inbox and start filing email into their appropriate folder and deleting emails you don't need.

  - **Deleting emails:** A good rule of thumb to follow is to get rid of an email if you haven't touched it in more than 30 days, and

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it isn't something you need to keep a record of like a contract or receipt. Once you have your filing system in place, go into your folders every couple months to prevent your folders from getting stuffed with emails that are no longer relevant.

- **Filing emails:** If an email needs your attention (e.g., follow up with a client, pay a bill, etc.), make sure you take care of it before you file it. If you file it too soon, you may forget about it.

Unsubscribe from emails you no longer wish to receive. If you have a lot of subscriptions, don't waste time unsubscribing manually from each one. Use unroll.me, a free tool that lets you unsubscribe from all your subscriptions at once. You can also use it to choose the subscriptions you want to cancel.

After you've invested time into cleaning and organizing your inbox, keep it under control by filing and deleting emails regularly.

### Tip 3: Go paperless

Paper can easily take over your business and become a major source of disorganization. It piles up, overflows in filing cabinets, and gets lost. Plus, managing a paper trail takes up a lot of time. To go paperless:

- Start by scanning your documents and uploading them to your computer or a secure cloud-based storage service like Dropbox. Whatever you choose, you can create a virtual filing cabinet with folders that'll keep your documents organized and out of your way.

- Stop using paper for things like invoices and proposals. Instead, start creating electronic documents.

Going paperless means you'll have access to your documents directly from your laptop anytime, anywhere. Whether it's a meeting with a client or finishing up some work from the comfort of your sofa, everything you need is stored in one place so you can stay organized and have the flexibility you need to run your business efficiently.

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80% of filed papers never get looked at again.

### Tip 4: Streamline your entire business with a client management software

Using a hodgepodge of different tools and systems that don't work together to run your business, can really hurt your business.

Fortunately, client management software, like Keap, can set your business up for success. Here are some things you can do with a client management software to organize (and revolutionize) your business:

- **Store and manage information in one place**, so you don't have to jump back and forth between tools or enter information more than once. You can also automatically track interaction and activity history with all your leads and clients.

- **Organize and manage your sales cycle from start to finish** with a sales pipeline that'll free up your time so you can focus on converting and closing sales in less time.

- **Automate various tasks and workflows**, so you don't have to spend time completing them. Instead, you can focus your valuable time on more important responsibilities like providing clients with personalized service and win more sales (a.k.a. make money).

- **Get paid faster** (without the headache that comes with old-school bookkeeping) by using an electronic payment system that makes it easy for you to send an invoice, set up recurring payments, and even send auto reminders on past due invoices.

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# Organization leads to a lot of win-wins

Up until now, we've been talking about how getting organized will help you save time, reduce stress, and set your business up for success. But there's one more key thing to consider. The effect it will have on your clients.

We live in a world where clients demand more, and if business owners don't meet increasing demands, clients will voice their opinion on social media and take their business elsewhere in the blink of an eye because they know they have a plethora of choices and getting personalized service is a must.

At Keap, we genuinely care about our clients. It's actually one of our core values. In fact, we care so much that we spent the last two years talking to small business owners like yourself to get to the bottom of what's preventing small businesses from achieving success. We found out that **70 percent of small businesses think clients are more demanding today than in the past**, and **80 percent say clients expect small businesses to be available around the clock**, online and by phone.

## So what does this have to do with getting organized?

A lot. When you organize your entire business, the positive effects trickle down to your clients because you're able to provide the personalized client experience they demand from you.

### Get it to them by yesterday

You know how we said getting organized will save you tons of time? It'll also save your clients time and gives them the information they want from you on their—"I need it yesterday!"—schedule.

For example, say you run a service-based business, and meet with a prospective client. If you're using a client management software, like Keap, which comes with ready-to-use templates, you can pull

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together a quote and email it to them right away—even before you've shaken their hand and said goodbye.

How do you think that makes them feel? Pretty good. They don't have to wait a few days to hear back from you and they quickly get the information they're looking for, which means they can get back to you with their decision a lot sooner. It's a win-win.

Now take that same example and imagine if you weren't so organized, and you're dealing with a demanding client. They need to wait for you to get back to your office, put the quote together, send it off in an email or snail mail (if their contact information didn't get misplaced by accident) before they finally find out the answer to their big question, "How much is it going to cost?" By then, they may have moved on to a competitor, received a price right away, and put down a payment.

### You won't forget (or annoy) them

Once you have everything in order and are no longer keeping track of everything in your head, you won't have to worry about things like forgetting to follow up with a prospective client or accidentally sending a client the same email twice.

Guess what? Your clients will enjoy the same stress relief thanks to you. They won't feel stressed or frustrated because you forgot to follow up with them when you told them you would. They won't get annoyed when you fill their inbox with emails, especially emails about things they don't care about. Look at that. Another win-win!

### They'll gladly pay you

When it comes time to pay, make sure you're super-organized and offering clients convenient options. Remember the demanding clients? Yep, those. They demand a lot of convenience, and this is where getting organized will really pay off for your business. Literally.

By convenience, we mean giving them a variety of payment methods and allowing them to pay you anytime, anywhere. More and more people are moving away from cash and checks and using credit cards, debit cards, digital wallets, and mobile payments instead. Software

tools like Keap make it easy and affordable for you to manage and collect payments and easy for your clients to pay you. Dare we say? Another win-win!

# From chaos to organizational bliss

Keeping track of clients and responding to them in a timely, accurate, and delightful way can be overwhelming. Luckily, there are tools to help you master the art of customer service.

Gleason Tax has been using Infusionsoft by Keap to organize and grow their business. In fact, it's become the center hub of their business.

See how Gleason Tax went from chaos to organizational bliss and doubled their sales and revenue in their first year of using Infusionsoft by Keap.

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