

all things
ADMIN[®]
Book Series

The Organized ADMIN

Leverage Your **Unique Organizing Style** to Create Systems,
Reduce Overwhelm, and Increase Productivity



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Author of *The Innovative Admin*

The Organized ADMIN

Leverage Your Unique Organizing Style to Create Systems,
Reduce Overwhelm, and Increase Productivity

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A Julie Perrine International, LLC Company



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Cover Design: Chris George

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ISBN-13: 9780982943069

ISBN-10: 0982943067

Printed in the United States of America

10 9 8 7 6 5 4 3 2 1

First Paperback Edition

Dedication

*To Evelyn Nuehring –
One of the most positive, upbeat, and courageous women
I've ever known.*

*Your living example of perseverance and a positive attitude
in the face of adversity have encouraged me to have faith,
push forward, and be grateful for the people and lessons that
come from this journey of life.*

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Foreword

The phone call was routine. I asked my usual assessment questions:

“What is the primary goal?”

“I need to set up my office space so it is used efficiently.”

“What is the primary change that needs to take place?”

“I need to clear out all the excess papers and set up systems.”

“What are you most concerned about?”

“I need to calm down my workspace. When I try to look for things, I have to move other things.”

And that was the beginning of my relationship with Julie Perrine.

Julie is always looking for the most effective and efficient means of doing things. If there is a way to shorten the learning curve, she wants to find it. That is why Julie and I began working together. And that is why I have worked with her in her first office, second office, home office, and in other areas of her personal and professional life. Always open to my coaching, she was

a quick learner and willing to make changes to achieve her organizing goals.

Fast-forward 10 years, and Julie has written a book inspired by many of the organization principles I have taught her. And I am so proud of my dedicated and hard-working student.

I often tell my clients the best way to learn something new is to do it. This concept is called praxis. The beautiful thing about this book is that, through her writing, Julie guides you in a simple and straightforward way to use praxis to accomplish your organizing goals.

Each chapter is dedicated to an area of your work life that requires organization, whether it is the physical appearance of your workspace, your email, or the complicated travel schedule of your executive. Julie clearly describes the possible issues you may face and systematically provides clear and meaningful solutions to solve these challenges. Her plan of action at the end of each chapter reduces overwhelm by providing a step-by-step approach to improving organization in that particular area.

*“Being organized is not an end in itself – it is
a vehicle to take you
from where you are to where you want to be.”*

~ STEPHANIE WINSTON, AUTHOR OF
THE ORGANIZED EXECUTIVE

It is important to understand that improving your organization skills is mostly about behavior modification. You have to change your habits to change your environment. So I encourage you to recognize your natural strengths and use them in the organizing processes highlighted in this book.

I often ask my clients, “What is causing you the most discomfort right now?” The answer to that question helps me to determine our starting point. Ask yourself that question, then pick the chapter of this book that corresponds with your concern.

What impresses me most about this book is that Julie wrote it from her head and her heart. I have had the honor of coaching her throughout the writing process, and it is very clear that her drive to put these words on paper is to help as many people as she possibly can. I promise that if you take even one recommendation from this book, you will become a better administrative assistant.

Congratulations on taking the first step to a more organized life!

Maggie Jackson, CPO[®]
President and Owner
The Organized Life
Certified Professional Organizer[®]
NAPO Golden Circle Member[®]
ICD Level II Chronic Disorganization Specialist
ICD Level II Attention Deficit Disorder Specialist

Getting Started

Welcome to *The Organized Admin!* When I launched All Things Admin in 2009, I began asking assistants, “What are your top two challenges?” Over and over again, the answer has been, “Getting organized!” Admins want help organizing time, spaces, files, emails, meetings, events, travel, projects, their careers, and more!

In this book, I am going to address the key areas where organizing challenges arise for admins and explain:

- What it means to “be organized.”
- Why being organized is vital to your career success.
- How to become more organized in your career.
- Tools and systems that may help you stay organized.
- Tips and resources you can apply to your environment and work style.

Review the Roadmap and Chart Your Course

To get started using this book, scan through the table of contents to gain an overview of the topics covered in becoming The Organized Admin. As you scan it, flag or highlight the chapters you want to focus on first. Most chapters contain an action plan at the end to give you a roadmap for getting started and taking immediate action.

Once you have a good overview of the material, use this book as a guide to chart your course to organization. You may want to break the process down into weekly or monthly goals. Track your progress to help you stay the course.

The chapters of this book and areas of organization were inspired by survey responses and reader feedback from the past several years. However, if you have an organizing challenge in an area the book doesn't cover, please let me know! Send me a message through the Contact page at **TheOrganizedAdmin.com**, and tell me what you need help with. I love hearing from you, and I'd love to help you find a solution!

Your Implementation Plan

For your convenience, all of the action plans in this book (plus a binder cover) are available in an electronic download at **TheOrganizedAdmin.com**. I did this so you can easily download the action plans, put them in a three-ring binder (The Organized Admin binder!), and use them to track your personal progress and transformation as you implement what you learn.

I also recommend you start a journal or insert blank sheets of lined paper in your binder so you can record things as you work through each chapter. You'll need something to take notes on and capture thoughts in as you're inspired by the various examples and ideas in this book. Having your action plans and writing paper in the same binder will keep you organized.

Additionally, I encourage you to take before-and-after pictures of your workspace or screenshots of your digital file folders to include in your binder so you can see the progress you make along the way. You may not want to remember how awful it looked when you first began, but it's a key motivator when you look at it later and see how far you've come. I even encourage taking pictures at various stages of the process to track your journey visually. It's a very powerful way to view your progress from start to finish.

Resources, Files, and What I Use

Throughout this book, you'll find these three icons indicating additional resources, files, or ideas for that chapter. Since organizing products and technologies often change, I didn't want to list the specific product brands or names in print. Instead, I've posted links and pictures on our website, **TheOrganizedAdmin.com**, so you can always find the latest tools I use and recommend.



The file folder icon indicates a **File Download**.



The mouse icon indicates a **Resource Alert**.



The push pin icon indicates **What I Use**.

My Writing Style

I tend to write in a conversational style. While I do believe in good grammar, correct punctuation, and complete sentences, there may be places where I stray a bit for emphasis. But fear not – my editing team usually keeps me in line. I share this because I know how particular admins, myself included, can be. It is, after all, part of what we do for a living – proofing other people’s documents. That said, if you find an error that I should correct in future editions, please visit the Contact page at **TheOrganizedAdmin.com** and let me know.

Throughout the book, the terms “admin,” “assistant,” and “administrative professional” are used to represent the hundreds of titles that comprise the administrative profession. No matter what your specific title may be, I’ve written this book for you. I also use the terms “manager,” “executive,” “boss,” “supervisor,” and “team” when referring to those you work with or report to – no matter what their titles may be.

Let’s Get Organized

A lot of what I’m going to share and recommend may require making changes to how you currently work. It will require establishing new habits and eliminating old ones that are not supporting you. There are no shortcuts. You have to do the work to experience the results of change and transformation that you are looking for in your life and career.

At times, my approach is direct and to the point. But if you have heard me speak, participated in my training programs, or follow my writing online, you know I always tackle issues with a positive, proactive attitude. This book is no exception.

If you’re ready to finally get organized, let’s get started!



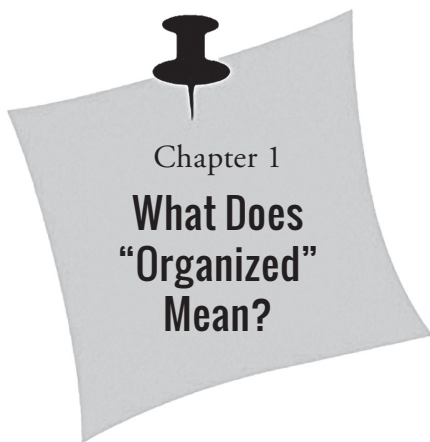
Part 1: Organization Basics

Before we can dive into specific ways to help you organize things, we need to cover a few basics that will set you up for long-term organizing success!

- What Does “Organized” Mean?
- The Cost of Disorganization
- Discover Your Unique Organizing Style
- Principles of Organization
- Create Systems for Organization







Chapter 1

What Does “Organized” Mean?

“Organization is neither entirely genetic nor environmental; it’s learned. This is reassuring because no one is perfectly organized.”

~ LAURA STACK, THE PRODUCTIVITY PRO®,
BEST-SELLING AUTHOR, AND SPEAKER

Being organized means something different to everyone. Yet as administrative professionals, getting and staying organized are essential to being effective and efficient in our professional roles...and maintaining our sanity.

When people walk up to our desks, they expect us to know the answers, find the information they need, or connect them to the right people or resources. The ability to put our hands on that information and deliver it as quickly as possible builds credibility, trust, and confidence in those we support. Conversely, when we can’t find what we need, miss important details, or don’t have a

good system in place, we look incompetent and create a level of distrust that can be difficult to overcome.

The problem with getting organized is that people often think of it as a destination or a project, when it's actually an ongoing practice. It's not a place you arrive at and then quit. It's a habit you develop. It's a skill you learn. You have to continually exercise discipline and practice organizing your time, work, and things.

We all have an area or two where we need to improve. There may be people who appear to have it all together in one area, but I guarantee there are other places in their lives that are disorganized. I'm a good example of this. I've had several people tell me I'm the most organized person they know. And I do a pretty good job in most areas, but I have organizing challenges just like everyone else. Each time I advanced to a new level of responsibility or executive support, I had to adjust my organization strategies for the new situation. While I've always kept my work office organized, I struggled with my home office when I started my business. Advances in technology and software force me to reevaluate my organization systems more frequently.

Thankfully, I met Maggie Jackson, a Certified Professional Organizer. With Maggie's assistance, I came to understand the immense value of a professional organizer – even for the most organized admins. She helped me identify my organizing problem spots, create a plan for resolving them, and develop new habits that made it easier to maintain an organized space in my new environment moving forward.

Maggie also taught me that getting organized means letting go of one major myth: organized doesn't mean neat. And she's right. If your organizing style is to put everything away and my

style is to keep everything out, our desks are going to look very different. Neither style is wrong. But one style will look neater, even though both are organized and effective for our respective work styles. As you'll learn in this book, being organized doesn't necessarily mean your desk is perfectly arranged – it means you can find what you need when you need it.

So, as you start thinking about organization, try to let go of the perfectionist mindset. Realize it's OK to ask for help. Understand that the principles of organization are the same no matter where you go, but you might need to adjust how you apply them. And most importantly, accept that getting organized is an ongoing and evolutionary process.

Organization Defined

I define organization as the systems we use to find, do, or complete things. Whether you're looking for a file at the office or gloves in your coat closet, the system you use to help you store and locate things is key.

As I've worked with professional organizers throughout my career, it always comes down to one question: “Where does this item live?” If it doesn't have a permanent home or system for quick retrieval, then you need to create one. That's one secret to eliminating clutter, getting organized, and maintaining a healthy level of organization that will support you moving forward.

This is why I love creating office procedures and developing forms, templates, and checklists to help me stay on top of each project, task, or assignment. This is also why I keep a few simple tools at the ready so I can quickly sort, contain, and label items and create a home for them. (We'll talk more about those things later in this book.)

When you approach organization with the understanding that it's a skill you can learn and a habit you can develop regardless of your tendencies, and you create effective systems to support an organized environment moving forward, it creates a new perspective that will help you get and stay organized.

If you're ready, let's get started!



PLAN OF ACTION:

- Make a list of the organizing problem spots you have today.
- Jot down some notes about why they are a challenge, and what keeps you from getting or maintaining organization in your problem spots.
- Note your answers to the above questions in your journal or organization binder.
- Share your challenges with us at **TheOrganizedAdmin.com**.

Appendix



RECOMMENDED READING

Best Practices for Administrative Professionals

- *Administrative Excellence* by Erin O'Hara Meyer
- *Be the Ultimate Assistant* by Bonnie Low-Kramen
- *Become An Inner Circle Assistant* by Joan Burge
- *Executive Secretary Magazine* published by Marcham Publishing, Lucy Brazier, CEO
- *Not "Just An Admin!"* by Peggy Vasquez
- *The Definitive Personal Assistant & Secretarial Handbook* by Sue France

Communication, Career Planning, and Success

- *Crucial Conversations* by Patterson, Grenny, McMillan and Switzler
- *Eat, Drink & Succeed* by Laura Schwartz
- *Guerilla Marketing for Job Hunters 3.0* by Jay Conrad Levinson
- *The 7 Habits of Highly Effective People* by Stephen R. Covey
- *The 8th Habit: From Effectiveness to Greatness* by Stephen R. Covey

Email Management

- *Brilliant Email* by Dr. Monica Seeley
- *Inbox Detox* by Marsha Egan
- *The Executive Secretary Guide to Taking Control of Your Inbox* by Dr. Monica Seeley

Developing New Habits and Navigating Change

- *Better Than Before* by Gretchen Rubin
- *Change Anything: The New Science of Personal Success* by Patterson, Grenny, Maxfield, McMillan, and Switzler
- *The First 30 Days* by Ariane de Bonvoisin

Organizing Tips and Ideas

- *2 Minute Organizing Miracles* by Becky Esker
- *Clutter Control!* by Susan Wright
- *Confessions of an Organized Homemaker* by Deniece Schofield
- *Keeping Work Simple* by Carol Cartaino and Don Aslett
- *The One-Minute Organizer Plain & Simple* by Donna Smallin
- *The TSSI Style Guide: A Professional's Resource* by Cena Block

Productivity and Time Management

- *Doing the Right Things Right* by Laura Stack
- *Leave the Office Earlier* by Laura Stack
- *No Excuses!* by Brian Tracy
- *SuperCompetent* by Laura Stack
- *What To Do When There's Too Much To Do* by Laura Stack

Strengths, Personality Type, and Work Styles

- *Fascinate* by Sally Hogshead
- *StandOut* by Marcus Buckingham
- *StrengthsFinder 2.0* by Tom Rath
- *Type Talk* by Otto Kroeger
- *Type Talk at Work* by Otto Kroeger
- *The Art of SpeedReading People* by Paul D. Tieger
- *The Birth Order Book* by Dr. Kevin Leman

Travel Planning

- *Kiss, Bow, or Shake Hands* by Terri Morrison and Wayne A. Conaway

Technology Training

- *100 Tips Using MacOS X & Office 2011* (Spiral-bound Guide) by Vickie Sokol Evans, MCT
- *100 Tips Using Windows 8.1 & Office 2013* (Spiral-bound Guide) by Vickie Sokol Evans, MCT



RESOURCES FOR THE ORGANIZED ADMIN

Certifications

- Certified Administrative Professional – IAAP-HQ.org
- World Class Assistant Certification – OfficeDynamics.com
- Microsoft Office Certifications – Microsoft.com/en-us/learning/office-certification.aspx
- Advanced Certificate for the Executive Personal Assistant – BMTG.org
- Certified Professional Organizer – NAPO.net
- The Institute for Challenging Disorganization provides five levels of certificates and certification. ChallengingDisorganization.org
- Project Management Professional – PMI.org
- Certified Associate in Project Management – PMI.org
- Certified Meeting Professional – ConventionIndustry.org

Organizing and Productivity Websites

- ABowlFullofLemons.net
- ChallengingDisorganization.org
- GetOrganizedNow.com
- GetOrganizedWizard.com

- GettingThingsDone.com
- InnovativelyOrganized.com
- JulieMorgenstern.com
- NAPO.net
- OrganizingHomeLife.com
- OrgJunkie.com
- PeterWalshDesign.com
- SaneSpaces.com
- TheOrganizedAdmin.com
- TheProductivityPro.com

Visit **TheOrganizedAdmin.com** to see our most current list of resources for apps, software, organizing supplies, and more.



OTHER BOOKS BY JULIE PERRINE

The Innovative Admin: Unleash the Power of Innovation In Your Administrative Career



TheInnovativeAdmin.com



5 Simple Steps to Creating Your Administrative Procedures Binder (e-book)

Your Career Edge: Create a Powerful Professional Portfolio (e-book)

Your Career Edge: Create a Professional Online Portfolio (e-book)

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Strategic Career Planning

Template Packages

Travel Planning

Training On Demand

Visit **AllThingsAdmin.com** for information on these products and many more.

About the Author

Julie Perrine

Certified Administrative Professional® – Organizational Management

Certified Myers-Briggs Type Indicator® Administrator

Certified Productivity Pro® Consultant

Julie Perrine, CAP-OM, is an administrative expert, trainer, motivational speaker, and author. She is the founder and CEO of All Things Admin, a company dedicated to developing and providing innovative products, training, mentoring, and resources for administrative professionals.

Julie has more than 20 years of experience in the administrative profession spanning several industries and serving in corporate and startup settings. Her mission is to guide, encourage, and connect administrative professionals to the technologies, ideas, resources, and people they need to achieve professional success. Her upbeat, straightforward approach to handling opportunities and challenges gives admins proactive strategies for developing a plan, making progress, and achieving results.

Julie has created several innovative tools and programs for administrative professionals, including the Administrative Procedures Toolkit, Kick-Start Creating Your Administrative Procedures Binder Course, Professional Portfolio Builder, and ePortfolio Builder. Julie's first book, *The Innovative Admin: Unleash the Power of Innovation In Your Administrative Career*, was released in 2012. She is also the author of the eBooks: *5 Simple Steps to Creating Your Administrative Procedures Binder*, *Your Career Edge: Create a Powerful Professional Portfolio*, and *Your Career Edge: Create a Professional Online Portfolio*.

Julie transformed a career as an administrative professional into several successful enterprises and shares her knowledge, expertise, and resources with individuals, corporations, and organizations as an online business model consultant, personality type strategist, and productivity expert.

Julie writes regularly for the Executive Secretary Magazine and All Things Admin, and her articles have been published in professional publications worldwide. She has been active in local and international organizations, including the International Association of Administrative Professionals and the National Association of Professional Organizers.

To inquire about having Julie Perrine speak at your next meeting, contact us through our website at **AllThingsAdmin.com**.



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Twitter.com/ProceduresPro

LinkedIn

LinkedIn.com/company/All-Things-Admin

LinkedIn.com/in/JuliePerrine

For downloadable resources mentioned in this book, visit
TheOrganizedAdmin.com.

To inquire about having Julie Perrine speak at your next meeting, contact us through our website at AllThingsAdmin.com.

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