



MAP of Professional Organizer Training Program

Welcome, all of you, to our Professional Organizer Core Training Program. Clear & SIMPLE is excited to fill your five days with fantastic information, passion for the work, and individualized attention. This is a detailed map of instructions, events and expectations to help you prepare for this 5 day adventure.

IN ADVANCE OF TRAINING

Materials to read: We encourage you to get them for your library!

- Julie Morgenstern - Organizing From the Inside Out
- Kathy Waddill - The Organizing Sourcebook
- Barbara Hemphill - Taming the Paper Tiger at Home
- Barbara Hemphill - Taming the Paper Tiger at Work, recommended if you will be working with businesses, including home based businesses
- Sharon Stasney - Feng Shui Your Work Spaces for those of you interested in Feng Shui,
- Please bring your favorite books/products to share with the group!

To Prepare:

- Please come prepared the first day to share with the group a 10 minute presentation on "who you are", why you are attending, your favorite organizing product, plus your goals and dreams for the next year. We always have inquires on the nature of this introductory presentation. This is your opportunity to share your story of "who you are as an organizer." This is FUN TIME. Choose from any of the following:
 - Utilize show & tell props such as your favorite product or tool
 - Tell stories from your life illustrating your passion for organizing (our favorite part)
 - Share your work history prior to now
 - Share your desires for being an organizer or for incorporating the skill
 - Share your goals for this next year
 - If you have begun your business, share you materials and creations
 - Anything else you want!
- Please complete the attached Student Evaluation Form and email or fax to Clear & SIMPLE, as soon as possible.
- Please write and bring your own definition of organizing.



GENERAL ITEMS:

- **TIME:** The training goes from 9 a.m. to 6 p.m. each day. Please arrive by 8:50 a.m. so we can be seated and ready to start at 9:00. THANKS!

- **DRESS:** Please dress in your style that is both professional and comfortable (no perfume please). For the “hands-on-work” day, bring clothes & shoes suitable for the work, yet professional. For example, the Clear & SIMPLE™ team uniform is khaki or black pants with a white, black, or green shirt. Also, bring an apron if you have one (a black, 2 pocket waitress apron is perfect), a tape measure and rubber bands. Bring clothes for evening fun.

- **BODY CARE:** Please take good care of your body before and during the training with rest and self care. We will do most of the work during the training but you will also have assignments.

- **TOOLS:** Please come prepared with tools for extensive note taking, your day timer system, a bag for items to take home (some will be gifts) and \$\$ if you want new items, plus any other tools you need.

- **LOCATION:** The SLC Trainings are held at the Clear & SIMPLE Office – 150 S. 600 E., Suite 5D, Salt Lake City UT 84102. The location of training in other states will be forwarded to you by the “Hostess” of the training in the area. You will be notified of the location when you enroll.

- **LUNCHES & DINNERS:** All dinners will be on your own; however, we recommend the group gather on the second evening and dine together to get to know one another better. The location can be chosen by the group. For lunch on day one, Clear & SIMPLE™ will take the entire group to lunch. Day two and three are on your own. There is a large variety within blocks of the training. You will get one hour, 15 minutes. Day Four (the hands on day at the clients) can be ordered as a team and brought to the client location or you can pack a lunch to take along. On Day Five, we will have lunch delivered to make it a “working” lunch. Please feel free to bring any drinks, snacks, and special dietary requirements to the training.

- **HOMEWORK:** There will be homework on day one and day two. Please be prepared to spend 1 hour of your evenings doing this.



AGENDA: DAY ONE

- Book of the Day: "Growing Your Business", Mark LeBlanc www.markleblanc.com
- C & S Product of Day – Favorite Containers – CD of our Favorites \$19.95
- Time Management Tool of the Day – Levenger Circa Binders
- Container of the Day – Mesh Envelopes

Morning - Your Presentations:

- 9:00 – 9:30 Opening
Welcome and General Business
- 9:30 - 10:30 Presentations from the Group (10 minutes each). This is our time to get to know each other and experience all the different identities that exist as organizing specialists. The idea is to talk about who you are now and where you want to go. This is the beginning of your identity as an organizer and giving this gift to the world. Give this time your best.
- 10:30 - 10:45 Break
- 10:45 – 11:45 Continue group presentations followed by Marla and Lisa sharing about their journey as Professional Organizers
- 11:45 - 12:00 Group Picture
- 12:00- 1:15 Lunch as a group, courtesy of Clear & SIMPLE

Afternoon – Your Identity as an Organizer:

- 1:15 – 2:45 Elements of Your Business Foundation
- Your Defining Statement – "Growing Your Business" by Marc LeBlanc
 - S.W.O.T. Analysis on yourself and/or your business
 - S.A.P. for your perfect client and/or perfect business
- 2:45 – 3:00 Break
- 3:00 – 4:30 Elements of the Industry
- Entrepreneur or Corporate Career
 - NAPO and other organizations
 - Code of Ethics
- 4:30 – 4:45 Questions & Answers / Home Work
- 4:45 – 5:45 Front of Binder creation
- 5:45 – 6:00 Closing, Share Binder creation with group

Homework: **Work on your foundation map, new defining statement, and 60 second intro. Initial client consultation tomorrow – bring camera, portfolio, forms binder, measuring tape, see Client Consultation checklist in Day 2.**



DAY TWO

- Product of Day – Organizing, the Clear & SIMPLE Way – 8 CD series \$29.95
- Time Management Tool of the Day – Planner Pad & Franklin Covey
- Container of the Day – File tubs and totes

Morning - SEE IT, MAP IT, DO IT and SEEING the Client

- 9:00 – 9:30 Opening
 Welcome – Product and tool of the day
- 9:30 – 9:45 60 Second Introductions
- 9:45 – 10:30 POWER OF THE SYSTEM – SEE IT, MAP IT, DO IT
- 10:30 - 10:45 Break
- 10:45 – 11:45 The Five Levels of Client Consultations
- 11:45 - 12:00 SEEING the Client using the forms and questionnaires
- 12:00 – 1:15 Lunch

Afternoon – The Client

- 1:15 - 3:15 How to apply the five levels to a real client
- 3:15 – 3:45 Review hands-on client folders, prepare for initial consultation
- 3:45 – 4:00 Break
- 4:00 – 4:15 Travel to client location with team
- 4:15 – 5:00 Initial Consultation
- 5:00 – 5:10 Travel to location for initial mapping of hands on job with your team leader
- 5:10 – 6:00 Closing
 Lead by team leader, map hands on job

SUGGEST DINNER as a group to socialize!

Homework: Review S.T.A.C.K.S and review Information for Day 3



DAY THREE

- **Book of the Day – “The Simple Life” Marla Dee**
- **Product of Day – Organize Your Vital Documents \$29.95**
- **Time Management Tool of the Day – Filofax**
- **Container of the Day – Paper Containers of all kinds**

Morning – PAPER

- 9:00 – 9:15 Opening
 Welcome – Product and tool of the day
- 9:15 – 9:30 60 Seconds
- 9:30 – 10:00 Review of Day 2 – Mind Map Hands on Client Job
- 10:00 – 10:45 PAPER Systems: Foundation
- 10:45 – 11:00 Break
- 11:00 – 12:00 Simple Action System
- 12:00 – 1:15 Lunch

Afternoon - PAPER

- 1:15 – 2:00 Detailed Action System
- 2:00 – 3:00 Making Files and File Systems: FreedomFiler, Paper Tiger
- 3:00 – 3:15 Break
- 3:15 – 3:45 Memorabilia and Photo Ideas: PhotoMax
- 3:45 – 4:55 Power Point Presentations of real clients and products
- 4:55 – 5:00 Closing

No homework – get a good night’s rest for tomorrow!



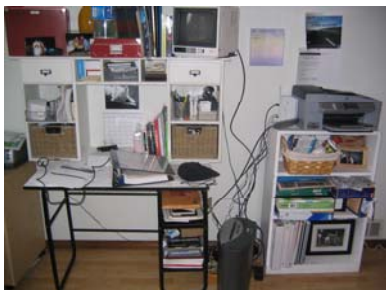
DAY FOUR

This entire day will be spent with your team at your client location!

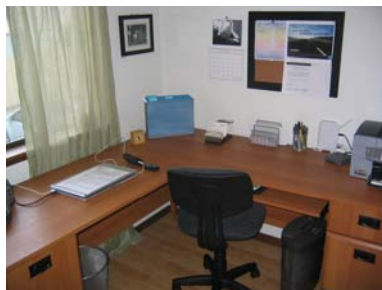
Depending on your client location – you will be given specific instructions on when and where to meet. We usually begin at 8:45 a.m., complete the job in full, and leave by 5:30 p.m.

- Each team is led by Marla Dee, Lisa Parsons, or a Clear & SIMPLE™ Certified Professional Organizer. You will be guided in all the aspects of your work throughout the day.
- Please dress appropriately for the job. Clear & SIMPLE™ team members dress in black, tan, or khaki pants with a white, black, or green shirt and black apron. See the client consultation checklist for a suggested list of items to bring.
- **Please remember to bring your own water and snacks to keep your energy up.** For lunch the group will select a location. A Clear & SIMPLE assistant will take your order, collect your money/cash, and deliver lunch back to the site. We will eat on site during the lunch hour.
- We meet with the client in a formal opening at the beginning of the day. You will be completing every stage of DO IT and S.T.A.C.K.S. including creating a “Keep It Up System” for the client to be reviewed in the closing.
- **We stay until we get the job done.** Because of scope creep and unforeseen circumstances, we may go past the 5:30 projected end time. Please do not make other plans for the evening, as you will be exhausted. Remember, every effort is made to map and track the job so that we end on time – 5:30 p.m.
- This is an energy intensive day where you will be utilizing all your learning, gifts, skills, and teamwork. Come prepared to give it your all and you will step away transformed in your self confidence to make a difference in a client’s space.
- Upon completion, you will be given a form to take home with you about what worked and what didn’t work. We have found that this is an excellent tool to be able to release all the energy around the job that you carry home with you. We will have a discussion around your thoughts and feelings at the beginning of tomorrow.

BEFORE



AFTER



HAPPY ORGANIZERS





Quote of the day:

*Do what you love – Have strong, clear MAPS
Work hard & joyfully - Take care of yourself first
Get a strong circle of support
Then the money will follow!*

Marla Dee

DAY FIVE

Morning – Becoming a Successful Entrepreneur

- 9:00 – 10:00 Opening
Welcome – Hands on Assessment Exercise
- How did you grow yesterday?
 - What did you learn about yourself?
 - What did you overcome?
 - What did you discover about this work?
- 10:00 - 10:15 60 Seconds
- 10:15 – 10:30 Break
- 10:30 – 11:15 Clear & SIMPLE Business
- Graduation
 - Advanced Training Program
 - Other Training Programs
 - Affiliation Program
 - Trademark
- 11:15 – 12:15 Time to organize yourself, your office, and your business. Together we map out your strategy for the next year.
- FIRST YEAR CHECKLIST, including:
Before You Open Your Doors
The First Three Months
- Office Set-up and Supplies
 - Business Development
 - One Page Business Plan
 - Best Year Yet
 - Vision
- 12:15 – 1:30 Lunch brought in –
Special Presentation – Organizing for Kids by Kelly Pratt
Complete product orders



DAY FIVE

Afternoon – Building a Business

- 1:30 - 2:30 Financial Aspects – Simple Financial Plan
- Setting fees
 - Billing and contracts
 - Actual operating chart
 - Financial plan and monthly budget
- 2:30 - 3:45 Marketing
- Effective Presentations
 - Top 25 Believers - Evangelists
 - Personal Testimonials
 - Networking Functions
- 3:45 – 4:00 Break
- 4:00 – 4:30 Completion of Foundation MAP, Questions, etc.
- 4:30 - 6:00 Closing the Circle

Thank you for joining us on this GRAND ADVENTURE!