

SEE IT. MAP IT. DO IT.®  
FOR THE ORGANIZER

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# PROFESSIONAL ORGANIZER FORMS



The Clear & Simple Way®  
to transform other people's lives.



## THE CLEAR & SIMPLE™ SELF STUDY FORMS OUTLINE

### SPECIAL INSTRUCTIONS

- 00.01 Forms Outline
- 01.01 Forms Instructions & Copyright Guidelines
- 01.02 Forms Instructions: Logo Change

### SEE IT: SEE THE CLIENT

- 02.01 Client Intake Form
- 02.02 Home Consultation Questionnaire
- 02.03 Space and Systems Checklist
- 02.04 Business Client Introduction Letter
- 02.05 Business Consultation Questionnaire
- 02.06 Left Brain-Right Brain Questionnaire

### MAP IT: MAP THE CLIENT

- 03.01 Top Three Priorities
- 03.02 Summary Action Map
- 03.02.01 Example
- 03.04 Multiple Areas Time Map
- 03.05 Proposal
- 03.06 Client Contract
- 03.07 Mind Mapping

### DO IT: S.T.A.C.K.S.©

- 04.01 Detailed Action Map
- 04.01.01 Example
- 04.02 Container Shopping List
- 04.03 Follow-Up Questionnaire
- 04.04 Single Session Action Map

### PAPER FLOW AND TIME MANAGEMENT

- 05.00 iRAFT Systems Guidelines
- 05.01 iRAFT Paper Flow Chart
- 05.02 Resource List for Paper and Office
- 05.03 Paper Retention Guidelines
- 05.03.01 Record Retention Guidelines
- 05.04 Filing System
- 05.05 Home File Guidelines
- 05.06 File Folders
- 05.08 Action Map 20xx
- 05.09 My Master Map 20xx
- 05.10 Entire Week Time Map

### BUILDING YOUR BUSINESS

- 06.01 Client Invoice
- 06.02 Client Detail Tracking
- 06.02.01 Client Tracking Example
- 06.03 Presentation Workshop Outline
- 06.04 Class Product Order Form - CC Authorization
- 06.06 Client Photo Release

### RESOURCES

- 07.01 Resource List for Books and Audios
- 07.02 Resource List for Containers and Storage
- 07.03 What Every Office Needs and Wants
- C&S Systems Handout



## Special Notice

### Regarding your FORMS Package:

The Clear & Simple logos and information in the header and footer are for visual and reference purposes only! You can remove them when customizing the form for your business.

The process is as follows:

- Open the form
- On the Menu select View
- Click on Header and Footer
- Double click on the item you wish to delete
- Hit the delete key on your keyboard
- Click close on the Header and Footer menu
- Save the document

The one exception to this allowance is the forms with SEE IT. MAP IT. DO IT.© or S.T.A.C.K.S.© on the form. These must keep the copyright at the bottom of the form.

- Summary Action Map
- Single Session Action Map
- Detailed Action Map

If you have any questions or problems, please call 801-463-9090 or email us at [info@clearsimple.com](mailto:info@clearsimple.com).

Thank you!  
The Clear & SIMPLE, LLC Team

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Insert your company name and logo here.



## CLIENT INTAKE FORM

### THINGS TO TELL THE CLIENT

- ☐ Describe your services.  
Enter your key selling points here.

- ☐ Explain your pricing.  
Enter your basic pricing structure here.

### QUESTIONS TO ASK THE CLIENT

- ☐ How can I help you?

- ☐ How did you find me?

- ☐ Client name:

- ☐ Mailing address:

- ☐ Physical address:

- ☐ E-mail address:

- ☐ Would you like to receive our bi-monthly Ezine? ☐ Y ☐ N

- ☐ Phone numbers:      Home:  
   Cell:  
   Other:

- ☐ Driving directions:

- ☐ Notes:



## SPACE AND SYSTEMS CHECKLIST

CLIENT CONTACT INFORMATION	
Name: _____	
SPACES I WOULD LIKE HELP WITH	SYSTEMS I WOULD LIKE HELP WITH
<p><b>Entry</b></p> <p><input type="checkbox"/> Entry table</p> <p><input type="checkbox"/> Mudroom (coats/hats/boots/purses)</p> <p><input type="checkbox"/> Staircase</p> <p><b>Kitchen</b></p> <p><input type="checkbox"/> Pantry</p> <p><input type="checkbox"/> Junk drawer</p> <p><input type="checkbox"/> General cupboards and drawers</p> <p><input type="checkbox"/> Other _____</p> <p><b>Dining room/living room</b></p> <p><input type="checkbox"/> Dining room table</p> <p><input type="checkbox"/> Buffets, china cabinets, other storage areas</p> <p><input type="checkbox"/> Items on the floor</p> <p><input type="checkbox"/> Horizontal surfaces (coffee table, shelves, speakers, entertainment center, fireplace mantel)</p> <p><input type="checkbox"/> Collections (CDs, videos, books, art objects)</p> <p><input type="checkbox"/> Other _____</p> <p><b>Home office</b></p> <p><input type="checkbox"/> Files</p> <p><input type="checkbox"/> Desk top</p> <p><input type="checkbox"/> Storage closets</p> <p><input type="checkbox"/> "To do" box or "In" box</p> <p><input type="checkbox"/> Phone message center</p> <p><input type="checkbox"/> Online organization (computer files, bookkeeping systems)</p> <p><b>Garage/outdoor spaces</b></p> <p><input type="checkbox"/> Gardening area</p> <p><input type="checkbox"/> Tools</p> <p><input type="checkbox"/> Seasonal items</p> <p><input type="checkbox"/> Long-term storage</p> <p><b>Children's spaces</b></p> <p><input type="checkbox"/> Bedroom</p> <p><input type="checkbox"/> Toy/play area</p> <p><input type="checkbox"/> Closet</p> <p><b>Master bedroom/bath</b></p> <p><input type="checkbox"/> Closets</p> <p><input type="checkbox"/> General upkeep</p> <p><input type="checkbox"/> Bath</p> <p><input type="checkbox"/> Underneath the bed</p> <p><input type="checkbox"/> Altar space</p> <p><b>Storage spaces</b></p> <p><input type="checkbox"/> Hallway closets</p> <p><input type="checkbox"/> Basement</p> <p><input type="checkbox"/> Attic</p> <p><input type="checkbox"/> Other storage areas</p>	<p><b>Important paper systems</b></p> <p><input type="checkbox"/> I need a system for dealing with the daily mail.</p> <p><input type="checkbox"/> I need a system for storing tax record information.</p> <p><input type="checkbox"/> I need a system for family medical history.</p> <p><input type="checkbox"/> I need a system for family genealogy and record keeping.</p> <p><input type="checkbox"/> I need a current filing system.</p> <p><input type="checkbox"/> I need a system for children's papers.</p> <p><input type="checkbox"/> I need a system for memorabilia and photos.</p> <p><input type="checkbox"/> I need a system for reading material.</p> <p><b>Family calendar system</b></p> <p><input type="checkbox"/> I need a way to track my family's comings and goings.</p> <p><input type="checkbox"/> I need a way to mesh calendars with family members.</p> <p><input type="checkbox"/> My children need a way to organize their household chores.</p> <p><b>Financial systems</b></p> <p><input type="checkbox"/> I need a system for paying my bills.</p> <p><input type="checkbox"/> I need a system for tracking my finances in general.</p> <p><input type="checkbox"/> I need a budget that works for me.</p> <p><input type="checkbox"/> Other _____</p> <p><b>Clothing system</b></p> <p><input type="checkbox"/> I need a place to put my clothes when I take them off at the end of the day.</p> <p><input type="checkbox"/> I need a system for my children's dirty clothes.</p> <p><input type="checkbox"/> I need a system for getting laundry folded and put away after it's cleaned.</p> <p><input type="checkbox"/> I need a system for organizing what's in my clothes closet.</p> <p><b>Pickup system</b></p> <p><input type="checkbox"/> I need a daily pickup system.</p> <p><input type="checkbox"/> My children need a system for putting things away at the end of the day.</p> <p><input type="checkbox"/> My children need a system for organizing their backpacks and school work.</p> <p><input type="checkbox"/> I need and/or my husband/wife needs a system for putting daily use items away, such as shoes, toiletries, purses, bags, briefcases, gym bags, magazines, books, dishes, etc.</p> <p><input type="checkbox"/> Weekly pick up system.</p> <p><b>General systems</b></p> <p><input type="checkbox"/> I need a household cleaning system.</p> <p><input type="checkbox"/> I need a yard care system.</p> <p><input type="checkbox"/> I need a home projects system.</p> <p><input type="checkbox"/> Other _____</p> <p><input type="checkbox"/> Other _____</p>

Insert your company name and logo here.



## CLIENT CONTRACT

The parties of this agreement are:

**Consultant:** \_\_\_\_\_  
\_\_\_\_\_

**Client:** \_\_\_\_\_

Thank you for the opportunity to be of service! We at (insert your business name) hope to create freedom, order, and clarity in your environment through our organizing services. This letter is to confirm the details of our agreement, including the systems and services to be provided by our professional organizing company.

### SYSTEMS AND SERVICES TO BE PROVIDED BY CONSULTANT


### FEES AND EXPENSES

- The consultant's fee for the above services is \$\_\_\_\_/hr.
- This amount is to be paid by cash, check, or credit card (separate form) on the date of service.
- Additional services for\_\_\_\_\_ will be billed at \$\_\_\_\_/hr.
- All materials needed to implement particular systems will be purchased at the expense of the client with client's authorization.

### CANCELLATION AND HONORS POLICY

- ☐ Client agrees to provide 48 hours notice before cancellation. If client cancels a consultation with less than 48 hours notice, client agrees to pay for two hours of consulting time.
- ☐ Client agrees by signing below that he/she is authorized to sign for this organizing job.

### CONFIDENTIALITY

All information seen, heard, or discussed with the client will be held in the strictest confidence.

### ETHICS AND LICENSURE

The consultant promises that she is licensed. The consultant honors a professional code of ethics - please see the following page.

Client signature \_\_\_\_\_ Date \_\_\_\_\_

Consultant signature \_\_\_\_\_ Date \_\_\_\_\_





Insert your company name and logo here.



NOTE: Attach your NAPO or Company's Code of Ethics on this second page



National Association of

**PROFESSIONAL ORGANIZERS NAPO Code of Ethics | [www.napo.net](http://www.napo.net)**

This Code of Ethics is a set of principles to provide guidelines in our professional conduct with our clients, colleagues and community. As a member of the National Association of Professional Organizers, I pledge to exercise judgment, self-restraint and conscience in my conduct in order to establish and maintain public confidence in the integrity of NAPO members and to preserve and encourage fair and equitable practices among all who are engaged in the profession of organizing.

## Clients

### *Working Relationships*

- I will serve my clients with integrity, competence, and objectivity, and will treat them with respect and courtesy.
- I will offer services in those areas in which I am qualified and will accurately represent those qualifications in both verbal and written communications.
- When unable or unqualified to fulfill requests for services, I will make every effort to recommend the services of other qualified organizers and/or other qualified professionals.
- I will advertise my services in an honest manner and will represent the organizing profession accurately.

### *Confidentiality*

- I will keep confidential all client information, both business and personal, including that which may be revealed by other organizers.
- I will use proprietary client information only with the client's permission.
- I will keep client information confidential and not use it to benefit myself or my firm or reveal this information to others.

### *Fees*

- I will decide independently and communicate to my client in advance my fees and expenses and will charge fees and expenses which I deem reasonable, legitimate, and commensurate with my experience, the services I deliver, and the responsibility I accept.
- I will make recommendations for products and services with my client's best interests in mind.

## Colleagues

- I will seek and maintain an equitable, honorable and cooperative association with other NAPO members and will treat them with respect and courtesy.
- I will respect the intellectual property rights (materials, titles, and thematic creations) of my colleagues, and other firms and individuals, and will not use proprietary information or methodologies without permission.
- I will act and speak on a high professional level so as to not bring discredit to the organizing profession.

