

# ***So You Think You Are Organized...***

**Jean Storms, MPM®**

## **❖ Take a few moments to fill in the answers these questions**

1. What is the reason you are attending this workshop today?
2. Circle one - your ability to organize  
(Very organized) (Somewhat organized) (Unorganized - need help)
3. What problems do you have with organization/time management?
4. List two organizational goals:
  - a.
  - b.
5. List one recurring problem or “fire” that occurs in your office

## **❖ Definitions - to organize**

- Definition - To systematize; example - to organize the files of an office
- Thesaurus:
  - establish, form, shape, unify, consolidate, bring together, arrange, classify, **systematize**, arrange, put in order, manage, coordinate, control, fix, run, assemble
- Interesting thought...

The antonym to organize is “to destroy or create chaos”

## **❖ FOUR KEYS AREAS OF ORGANIZATION**

1. Organization Assessment
2. 4 Basic Rules of Organization
3. Organization & Time Management
4. Organized Systems for Property Management

## **❖ First Key Area - Organization Assessment**

- Ask these important questions
  1. Is organization a priority for you and/or your business and personal life?
  2. Is there calm or chaos in the rest of your life
  3. Is there a cohesive environment?
  4. Do you have the right tools?
  5. Do you have good systems?

7. If you have personnel, do they like their jobs?
8. Do you take vacation time?
9. Can you take a true vacation?
10. Can you take a vacation without a nervous breakdown?

➤ **Can you organize or not organize**

1. Circle one (Yes) or (No)
2. What are your strengths regarding organization?
3. What are your weaknesses regarding organization?

➤ **Why bother with organization?**

- 1.
- 2.
- 3.
- 4.

➤ **What defeats organization**

- 1.
- 2.
- 3.

➤ **Avoid key self-defeating behaviors**

- Do not plan or do too much
- Reduce or even eliminate multi-tasking
- Limit constant checking of cell phone/email
- Avoid the “I can do it all” syndrome

➤ **Add these behaviors – they all increase organization**

- Exercise, eat well, and get adequate sleep
- Have fun, take a vacation, and have enjoyable pastimes
- Observe and enjoy nature – you can learn a lot
- DO NOTHING!

## ❖ Second Key Area - Practice four basic rules of organization

### 1. UNCLUTTER! - Reduce/eliminate - clear away the rubble!

Free up space, free your mind, relieve stress, and create room for organization; the amount of clutter in your life (and your brain) makes a difference in your process of reorganization

- Tackle every area in your life
  - ✓ Desk, desktop, computer files
  - ✓ Office layout, paper files, storage areas
  - ✓ Car, garage, home
- Unclutter with the following methods
  - ✓ Toss - use the round can system
  - ✓ Shred – *unclutter responsibly*; always follow the Federal shredding laws to reduce your liability.

**TIP** -Review the disposal rule, <http://www.ftc.gov/opa/2004/11/factadisposal.shtm>

- ✓ Recycle – when appropriate, practice green
- ✓ Delete - there is a trash can in your computer; when it is appropriate, use it.

**TIP** -You can also retrieve from the “Recycle Bin” as long as you do not “empty” it.

**TIP** - If concerned you about deleting a document, create your own “recycle” folder where you store old documents. Name the file something logical, like “Z Past” or “Z Documents.” By putting a Z at the beginning of the name, it will store at the bottom of your computer file folders - you can see this if you open up the Windows Explorer (symbols is yellow file folder)

**IMPORTANT** - be sure to have a good backup system!

### 2. HANDLE IT

- Prevent clutter before it happens
- When possible -DO a task RIGHT AWAY – avoid the clutter
- Do this when practical
- Do not use as an avoidance tactic unless to “jumpstart” action

### 3. PUT IT AWAY - Create an efficient filing system - this is a must

**Important:** Differentiate between what should remain within view or filed. If something does not need immediate action, file it. The key is to establish filing systems where you can easily retrieve the information when you need it.

- File every day action items that “could become clutter”

- Analyze and establish a logical filing system/ create a similar system for all files.

Most offices have more than one type of filing - normally, there are computer files, email files, office paper files, and storage files. When you open your desktop, it can be helpful to see a similar system/layout in your computer as you see in your paper files/storage files.

- Paper
- Electronic
  - ✓ Drag and drop computer documents; scan paper and drop in computer files
  - ✓ Eliminate paper
  - ✓ Scan and drop, then destroy or shred; **TIP** - *be sure to have backup system*

#### 4. DELEGATE IT

- Do you hate to do something? ... get someone else to do it
- Not going to do it, - admit it and move on after handling responsibly
- Choose carefully who you will delegate to
- Decide if you want it back; if so, when and how

#### ❖ Third Key Area - Organization and time management work hand in hand

##### ➤ Remember 2 important premises

1. There is not enough time to do everything
2. There IS enough time to do everything that truly matters to you

##### ➤ Practice the four basic organization rules

##### ➤ Monitor your inbox

- Go through each morning for priority
- If not handled in 48 hours, address what to do
- Limit the number of items in your inbox to 10

##### ➤ Avoid too many sticky notes creating chaos

**TIP** -Put them all in a notebook or on a large pad; when you finish, toss them; or, put them all on one big list and then toss them

##### ➤ Clean your briefcase, car, desk, and desktop daily - disorganization lurks

- this takes less time than having to devote a huge block of time or even a whole day

##### ➤ Use an effective To-Do-List daily

- Do it fast and - make it simple
- Limit your to-do's

*Don't create a monster you cannot finish - this has a negative effect*

- Work in blocks of time when possible
- Many ways to do a to-do-list
  - ~ Paper
  - ~ Electronic
- At the end of the day
  - ✓ Clean up your desk, prepare for the next day
  - ✓ Create your to-do list for the next day

**Tip** - once a day or at least once a week, do a “completed or done” list.

- USE your computer(s) effectively
  - Implement a reliable backup program
  - Avoid the password nightmare
  - Learn your computer programs

✓ **See handout - Computer Time Savers**

#### ❖ **Fourth Key Area - Property management systems = professional organization**

- Systems increase productivity by
  - Creating organization
  - Maintaining continuity
  - Supporting Fair Housing
  - Reducing or eliminating chaos or “fires”
- Specific systems
  - Marketing
  - Property owner
  - Tenant
  - Office
  - Personnel

✓ **Handout - Systems checklist**
- Make a plan
  - Prioritize your tasks
    - ~ Immediate
    - ~ Important
    - ~ Wish list

- Use a planning chart
  - ✓ *Handout - Map a system*
- Tools (documents) needed for PM systems
  - Effective forms, letters, agreements
    - ✓ The foundation necessary for systems
    - ✓ There should be a document ready to handle any repetitive situation
  - Manuals
    - ✓ Manuals are a system within themselves
    - ✓ Manuals guide each team member
    - ✓ Manuals educate your clients
  - Checklists
    - ✓ Checklists create consistency
    - ✓ Checklists help each member of the team
    - ✓ They are the vehicles that make systems work
  - Other needs
    - ✓ Project manager, staff
    - ✓ Outside resources
    - ✓ Classes / seminars
    - ✓ New technology or updated technology
- Budget time and money as needed
  - Increase support
  - Invest in education
  - Hire new services
  - Purchase new systems / update technology
- **Take one day at a time, one document at a time, and one system at a time!**

*Review what you have done...*

*If at first you don't succeed, try, try, and then revise your plan and try again!*

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## COMPUTER TIME SAVERS

Check the boxes of tools you wish to learn

<input type="checkbox"/>	<b>Backup regularly and effectively</b>	<ul style="list-style-type: none"> <li>▪ this can eliminate future chaos and total disorganization; you'll find out how it impacts organization when your computer fails</li> <li>▪ have multiple backups; have both local and online (the cloud)</li> <li>▪ also "copy" documents to external drives for quick backup (learn the difference between backup and copy)</li> </ul>
<input type="checkbox"/>	<b>Set up a cloud-based program to store your documents</b>	<ul style="list-style-type: none"> <li>▪ two advantages - you can work from anywhere, others can access if you wish, and it provides great back up; there are some free and until you need more space; one example is "Dropbox"</li> </ul>
<input type="checkbox"/>	<b>Create and efficient folder system</b>	<ul style="list-style-type: none"> <li>▪ in email, computer, paper and storage files; make it match and make it logical so you can find things easily, such as "owners, tenants, vendors, etc.</li> </ul>
<input type="checkbox"/>	<b>Create a z file in computer</b>	<ul style="list-style-type: none"> <li>▪ store unused or old documentation in this file; put a "z" in front of the folder and it will store on the bottom; afraid of deleting and needing it later, store in your "z" folder; computers have huge storage now so this is not a problem</li> </ul>
<input type="checkbox"/>	<b>Turn off the "you've got mail"</b>	<ul style="list-style-type: none"> <li>▪ this can be a distraction; check email regularly but avoid the compulsion/habit of checking "every minute"</li> </ul>
<input type="checkbox"/>	<b>Create screen shortcuts for Internet sites</b>	<ul style="list-style-type: none"> <li>▪ if you access certain sites regularly, make "shortcuts" on your desktop; for example – set up the NARPM® site as a shortcut to the "members" and use it as your address book; set up a shortcut to Amazon if you shop there regularly</li> </ul>
<input type="checkbox"/>	<b>Create document shortcuts</b>	<ul style="list-style-type: none"> <li>▪ if you use certain documents regularly, such as a lease, they are right at your fingertips</li> </ul>
<input type="checkbox"/>	<b>Avoid desktop nightmare</b>	<ul style="list-style-type: none"> <li>▪ avoid so many shortcuts you can't find anything - defeats the purpose, which is to put your most used shortcuts on the desktop for easy access</li> </ul>
<input type="checkbox"/>	<b>Not need to type http://....</b>	<ul style="list-style-type: none"> <li>▪ Internet search engines, such as Internet Explorer, Google Chrome, etc. do not require that you type in the entire web address.</li> </ul>
<input type="checkbox"/>	<b>Set up blogs</b>	<ul style="list-style-type: none"> <li>▪ Set up important blogs to send important updates to your email, such as the HUD blog, or social media, such as LinkedIn</li> </ul>
<input type="checkbox"/>	<b>Set up important PDF documents</b>	<ul style="list-style-type: none"> <li>▪ There are useful PDFs on the Internet for property managers, such as the URLTA or Antitrust PDFs. Download them and create a "computer library" shortcut right on your desktop</li> </ul>
<input type="checkbox"/>	<b>Learn universal key strokes</b>	<ul style="list-style-type: none"> <li>▪ There are so many universal keystroke that can save you time; example, Control C for copy; Control V for paste; take the time to learn the ones most often used and they can save you hours of time</li> </ul>
<input type="checkbox"/>	<b>Learn your software programs</b>	<ul style="list-style-type: none"> <li>▪ Use the power of your programs; do more than just type, backspace, delete, copy, etc.; learn the power of your programs, especially your word processing program (see the next page for tips for Microsoft Word®)</li> </ul>

## TIME SAVING MICROSOFT WORD® TIPS

**Check the boxes of items you wish to learn**

<input type="checkbox"/>	<b>Learn your version of word and explore the menu system</b>	To save time using Microsoft Word®, you have to learn how to find your version; then learn various tools to save time; then learn where tools are in the menu system in your version of Microsoft Word®
<input type="checkbox"/>	<b>How old is your version of Microsoft Word®</b>	It may be time to upgrade your Microsoft Word® program to take advantage of new tools, such as SmartArt and Screenshot
<input type="checkbox"/>	<b>Use function keys</b>	F1 will find help for your version on the Internet; F4 in some versions, such as 2007 and 2010 will repeat certain key strokes; F5 will take you to “go to” to find a certain page in a long document
<input type="checkbox"/>	<b>Turn on the Developer – it is found in different places in 2007, 2010, and 2013</b>	If you have versions 2007 and higher, turn on the developer tab on the menu system; it will give you many more tools and functions, such as Protect and Unprotect (restrict editing in the latest versions);
<input type="checkbox"/>	<b>Use Headers and Footers</b>	All versions of Microsoft Word® have “headers and footers;” consult your help function if you cannot find them; headers and footers can improve your professional image; you can set up a stationary template for you company using headers and footers
<input type="checkbox"/>	<b>Learn the format painter tool</b>	There are times when you want to quickly repeat certain formatting that you have created in part of a document in another part of a document; just highlight the style or formatting and click on the little paint brush – then go to the text you want to have similar formatting and click the little paint brush over it – it will copy the formatting
<input type="checkbox"/>	<b>Learn to utilize the highlighter tool</b>	This can be useful within documents, such as an application when you want to stress a particular point.
<input type="checkbox"/>	<b>Learn how to use styles – look up how to change in your version</b>	You can set up your own formatting “style” or adjust a current one; for example, you may not want your “normal” font to be Arial 10 but you want Calibri 11 instead; go to the normal style, right-click and choose “modify;” change the font and save
<input type="checkbox"/>	<b>Learn how to use form fields</b>	If you have documents that you want to use over and over, create it with “form fields;” then when you protect it (restrict editing), you can tab from field to field inserting the information without having to highlight and paste over existing text; this can save you from a lot of errors on documentation while creating a form, letter, and agreement very quickly
<input type="checkbox"/>	<b>Learn to use tables</b>	Tables make forms look fabulous; then lines and text will not skew all over; learn to use all the table functions; they are perfect for creating checklists and documents, such as applications



More Microsoft Word® tips

<input type="checkbox"/>	<b>Set up more on grammar and spelling</b>	Check your version on how to set up more “bells and whistles” for grammar and spelling; this makes the user look more professional; always check your spelling before sending out
<input type="checkbox"/>	<b>Add words to the dictionary</b>	There are names and special words that will always trip spell check – choose add to dictionary (just be sure to spell it right); then if you spell it wrong, for example your company name, it will catch the error
<input type="checkbox"/>	<b>Writing a document and want a better word? Use the Thesaurus</b>	Just highlight a word and it will give you many choices and make you look more professional
<input type="checkbox"/>	<b>Learn to check print preview</b>	This can save wasted paper and time as well as catching errors, increasing your professional image
<input type="checkbox"/>	<b>Find and replace</b>	Learn to use the find and replace function to change repeated words; this can save you a lot of highlighting and typing
<input type="checkbox"/>	<b>Learn to use “paste” special</b>	This is useful when you don’t want to have to reformat what you paste in; copy what you want, then use paste special, choose “unformatted text” and it will paste it in with your existing formatting
<input type="checkbox"/>	<b>Learn to use autocorrect to avoid unnecessary typing</b>	You can save a lot of keystrokes using autocorrect; this is the function that suddenly turns a commonly misspelled word into the correct spelling; when you have a word that requires a symbol on the end, such as NARPM®, set it up in auto correct that when you type narpm it will automatically make it NARPM®. Another example is a word that you may spell incorrectly a lot typing too fast; example if you type knknow too often, you can set it up to automatically correct to know
<input type="checkbox"/>	<b>Set up the ribbon for your most used functions - this is for versions 2007 and higher</b>	When Microsoft changed from version 2003 to 2007, they changed the “menu” system; so it is often frustrating to find the function you want; if you have certain functions you use over and over, you can set up the “ribbon” to include them in one row so you do not have to search for them; tip - the ribbon can be above or below the main menu  For example: if you use the header and footer often, put it on the ribbon, put the “insert page number” icon on your ribbon - make a list of the ones you use the most and don’t want to continually look up
<input type="checkbox"/>	<b>Want your document to automatically insert the correct date?</b>	Go to insert/date & time/ select the date format you like and check the “update automatically” box; then when you bring up that template/document, it will put in the current date
<input type="checkbox"/>	<b>Want your logo in your document?</b>	Learn to “insert” picture and select from the file where you have stored your artwork

## SYSTEMS CHECKLIST

<b>PROPERTY OWNERS</b>				
	<i>System</i>	<i>New or Update</i>	<i>Comments/details</i>	<i>Priority (1,2,3)</i>
<input type="checkbox"/>	Buy new accounts system			
<input type="checkbox"/>	Management Inquiry system			
<input type="checkbox"/>	Management appointment system			
<input type="checkbox"/>	Owner Manual			
<input type="checkbox"/>	New owner system			
<input type="checkbox"/>	Owner termination system			
<b>PROPERTY</b>				
<input type="checkbox"/>	New property system			
<input type="checkbox"/>	Property survey system			
<input type="checkbox"/>	Property termination system			
<input type="checkbox"/>	Property rehabilitation system			
<b>TENANT</b>				
<input type="checkbox"/>	Application/processing system			
<input type="checkbox"/>	Move-in system			

<input type="checkbox"/>	Tenant manual			
<input type="checkbox"/>	Tenant violation system			
<input type="checkbox"/>	Tenant maintenance system			
<input type="checkbox"/>	Add or delete tenant system			
<input type="checkbox"/>	Add or delete pet system			
<input type="checkbox"/>	Notice to vacate system			
<input type="checkbox"/>	Tenant move out system			
<input type="checkbox"/>	Tenant security deposit system			
<input type="checkbox"/>	Unlawful detainer system			

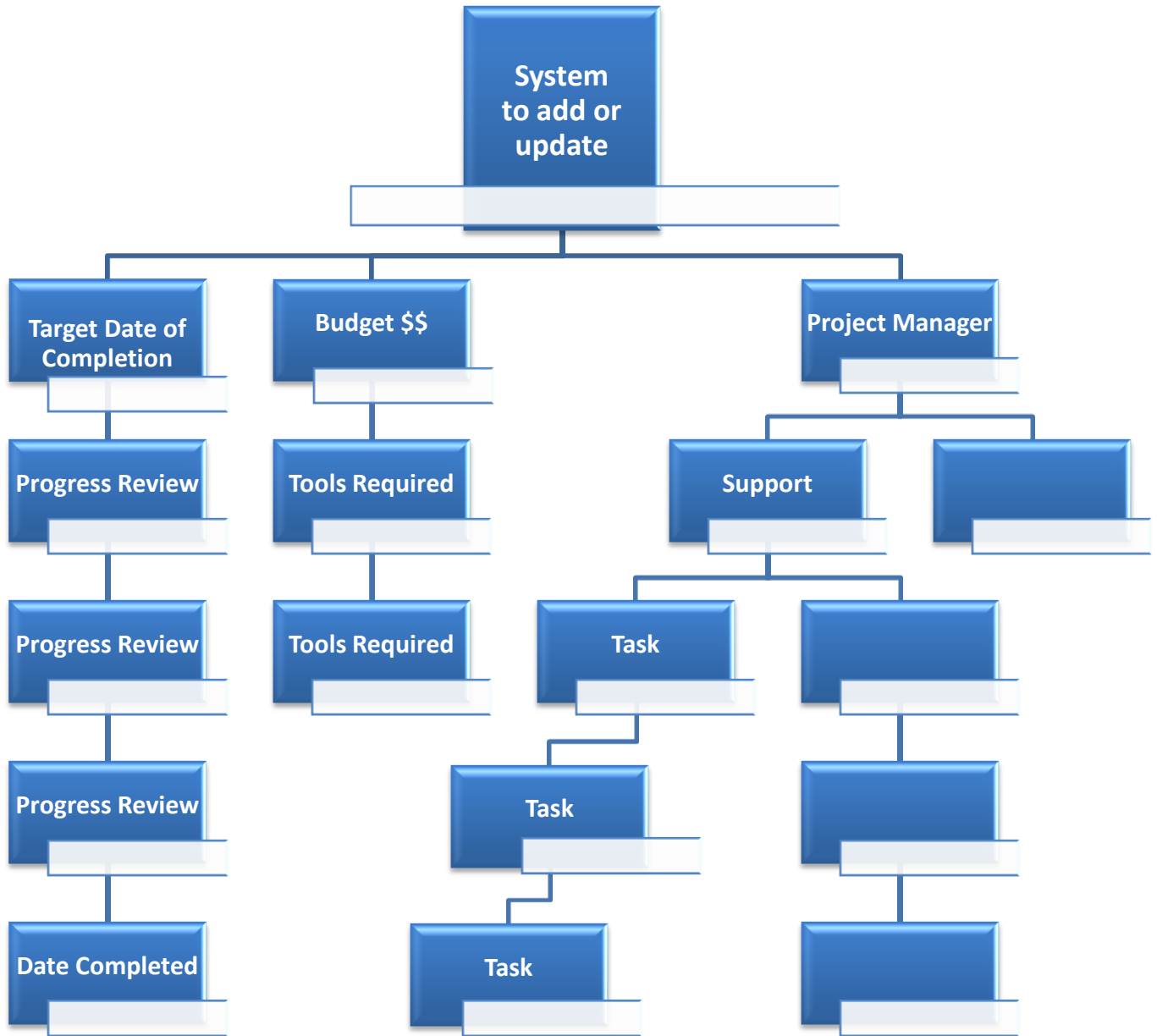
<b>PERSONNEL</b>				
<input type="checkbox"/>	Employee/Manual System			
<input type="checkbox"/>	New hire system			
<input type="checkbox"/>	Review system			
<input type="checkbox"/>	Personnel termination system			

**Systems Checklist, Continued**

	<i>System</i>	<i>New or Update</i>	<i>Comments/details</i>	<i>Priority (1,2,3)</i>
<b>VENDORS</b>				
<input type="checkbox"/>	Vendor Manual			
<input type="checkbox"/>	New vendor system			
<input type="checkbox"/>	Terminate vendor system			
<b>GENERAL OFFICE</b>				
	PM Policy and Procedures Manual			
	Real Estate Policy & Procedures Manual			
	New service system			
	Office supply system			
	Emergency/Disaster System			
<b>MARKETING/ADVERTISING</b>				
	Vacancy/showing system			

	Procure prospects system			
<b>BOOKKEEPING</b>				
	Bookkeeping Manual			
	Rental payment system			
	Owner ACH system			

# MAP A SYSTEM



## Planning Notes

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