

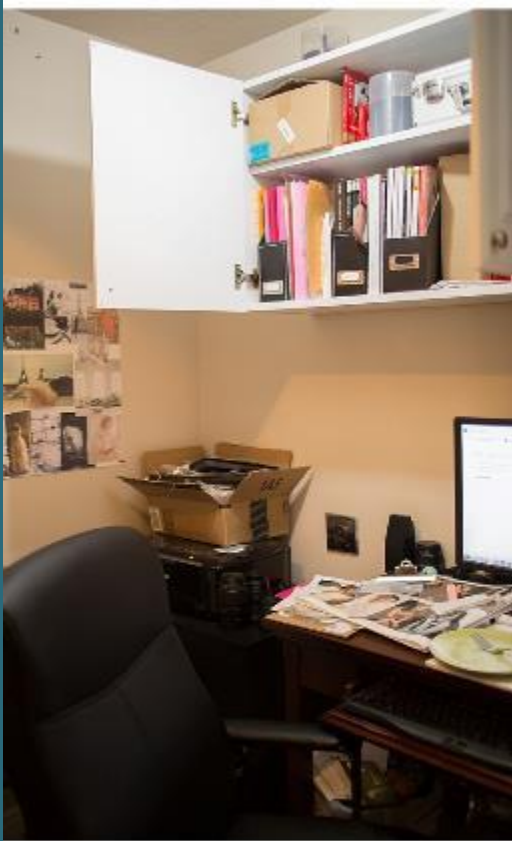
# Breaking Free...



# of Clutter & Disorganization



# Your Ultimate Office is waiting...



# The Secret is...

- The Skill
- The Systems
- The Tools



# Resource Page

## Best Tips, Tools, Experts!

### Favorite Products



#### Clear & SIMPLE Product Line

Full line of digital products written in the CBS Systems Language, that teach the skill.



#### Freedom Filer

The Ultimate Filing System. Tired of cleaning out files? Here is the best, maintenance-free, all-encompassing Home filing system.



#### Clear Project Folders

This is Clear & SIMPLE's favorite paper container and tool. Use it to hold incoming papers, replace manila folders, keep children's papers contained in backpacks, etc.



#### Container Store Acrylic Desktop File

Our favorite desktop action file box comes from The Container Store. It's functional and beautiful with a pop of color.

#### The Container Store

The Original Storage and Organization Store

#### The Container Store

"The original storage and organization store!" Our favorite online resource for tons of different types of items at affordable prices.



#### arc from Staples

Organize all your notes, tasks and to-do lists with M by Staples® Arc customizable notebook system. Its ultra-flexible design allows you to add, remove and rearrange your favorite pages and accessories again and again.



#### Circa by Levenger



#### Mesh Bags



#### Time Timer



# The TOOLS – Clear Project Folders



- Daily to do's
- Projects & Clients
- Inside hanging files
- For all size paper
- Incoming papers

[www.clearsimple.com/resources](http://www.clearsimple.com/resources)

## How to use our FAVORITE paper container... The Clear Project Folder



**Hold onto loose items  
(business cards, flyers, notes...)  
at conferences, conventions,  
workshops, meetings...**



**Separate items within hanging  
folders in your filing system.  
Lasts longer, works more  
efficiently and looks better  
than manilla.**



**File Bills to Pay, Calls to Make,  
Mail to Send, Pending Items and  
more in your Action System.  
Contain all the pieces of  
your Projects.**

TIME **TIMER**

***Tangible Time Management™***



[www.TimeTimer.com](http://www.TimeTimer.com)



# Paper & Email Pain



# **S Y S T E M**

**Saves**

**You**

**Stress**

**Time**

**Energy**

**Money**

# iRAFT System for paper and email



**iRAFT**©

*Handle paper, email & information  
in 5 simple steps.*

incoming

Read

Action

File

Toss



INCOMING



READ



ACTION



FILE



TOSS

# Paper

Capture Incoming  
think email...



# Capture the Incoming Papers

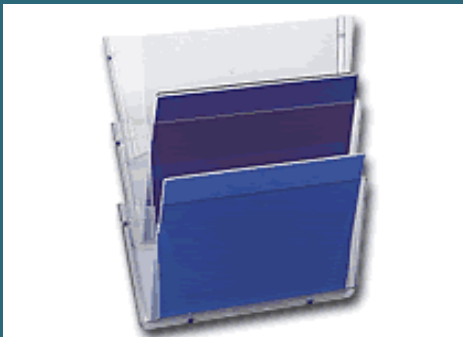




# Capture the Incoming - Vertical



# Incoming paper - Vertical



# Capture INCOMING information in the disc bound notebook



INCOMING information  
in one place on your smart phone



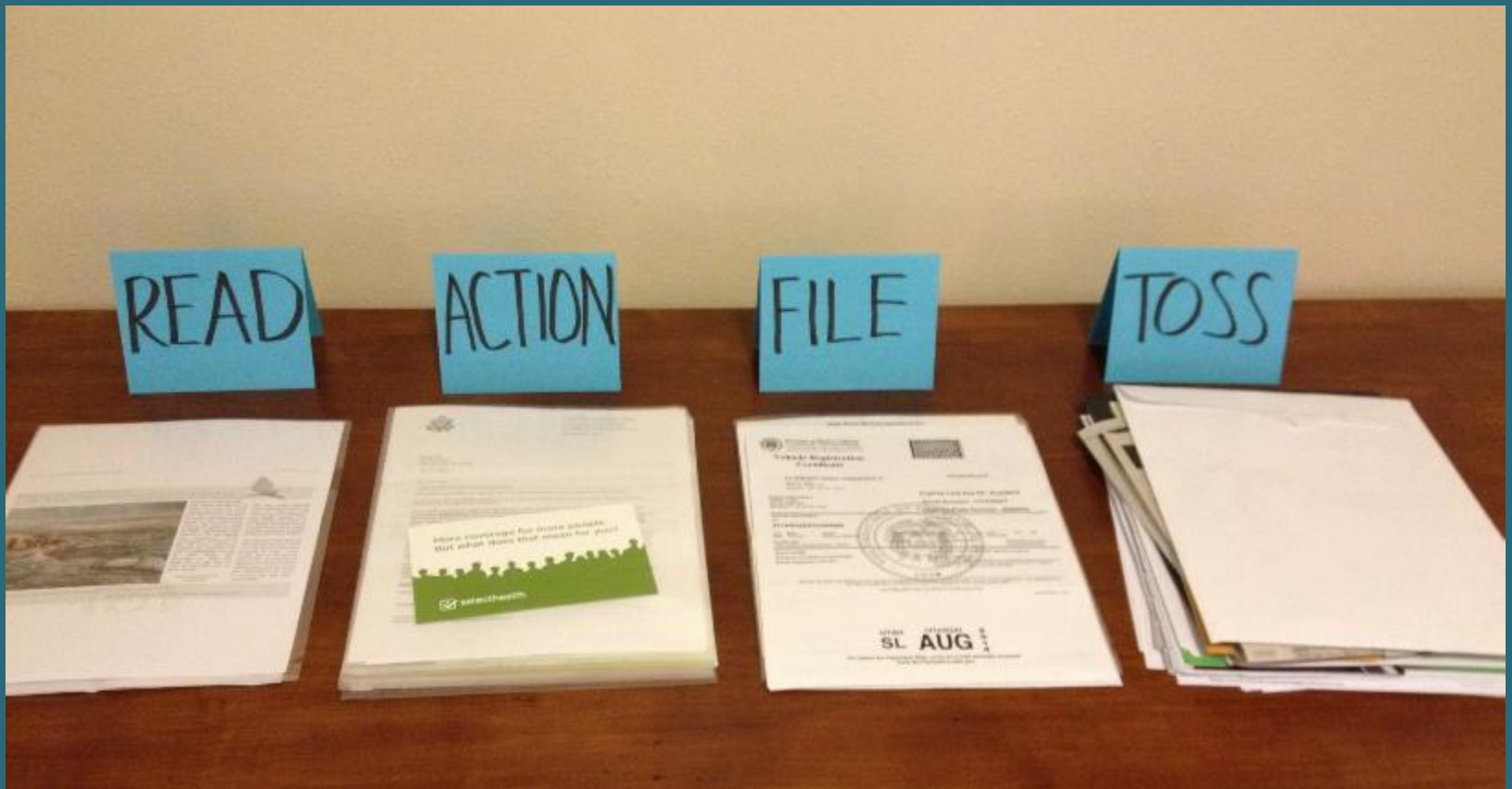
# Paper

Sort Weekly into  
RAFT©



# R.A.F.T. ©

## READ | ACTION | FILE | TOSS







INCOMING



READ



ACTION



FILE



TOSS

# R.A.F.T.© Read



# R.A.F.T.© Action



# ACTION Containers



# R.A.F.T.© FILE

File when done



# R.A.F.T.© Toss

Have shred & recycle containers near by





# Paper Flow SYSTEM

2 hours each week

- |  |            |
|--|------------|
| 1 – All <b>Incoming</b> into container | 10 minutes |
| 2 – Sort incoming into <b>RAFT</b>     | 10 minutes |
| 3 – Work with <b>Action</b> Items      | 90 minutes |
| 4 – <b>Filing</b> kept current         | 10 minutes |

# iRAFT in place



**iRAFT:**

**Incoming**

**Action**





**Read**

**File**





**Toss**

# iRAFT - email




Mailboxes

- ▼  Inbox
  -  MD Self
  -  Marla CS
  -  Clearsimple













Clearsimple







- ▶  1 - READ
- ▶  2 - ACT 2
- ▶  3 - FILE
- ▶  4 - TOSS

Clearsimple

- ▼  1 - READ
  -  Enneagram
  -  Story Brand

Clearsimple

- ▶  1 - READ
- ▼  2 - ACT
  -  1\_CS Products
  - ▶  1\_Marla
  -  2 - Story Brand
  -  3 - Financial
  -  4 - ART Course
  - ▶  Events
  -  Kate
  -  Marianne
  - ▶  Pending
  -  Teachable

-  Reference 2015
-  Reference 2016
- ▶  Reference 2017
- ▶  Reference 2018
- ▶  Reference 2019
-  Treasures & Resources

# Learn the Skill – only 10%

























SEE IT



MAP IT



DO IT©



clear & SIMPLE™

S.T.A.C.K.S.©



clear & SIMPLE™







SEE IT



MAP IT



DO IT©

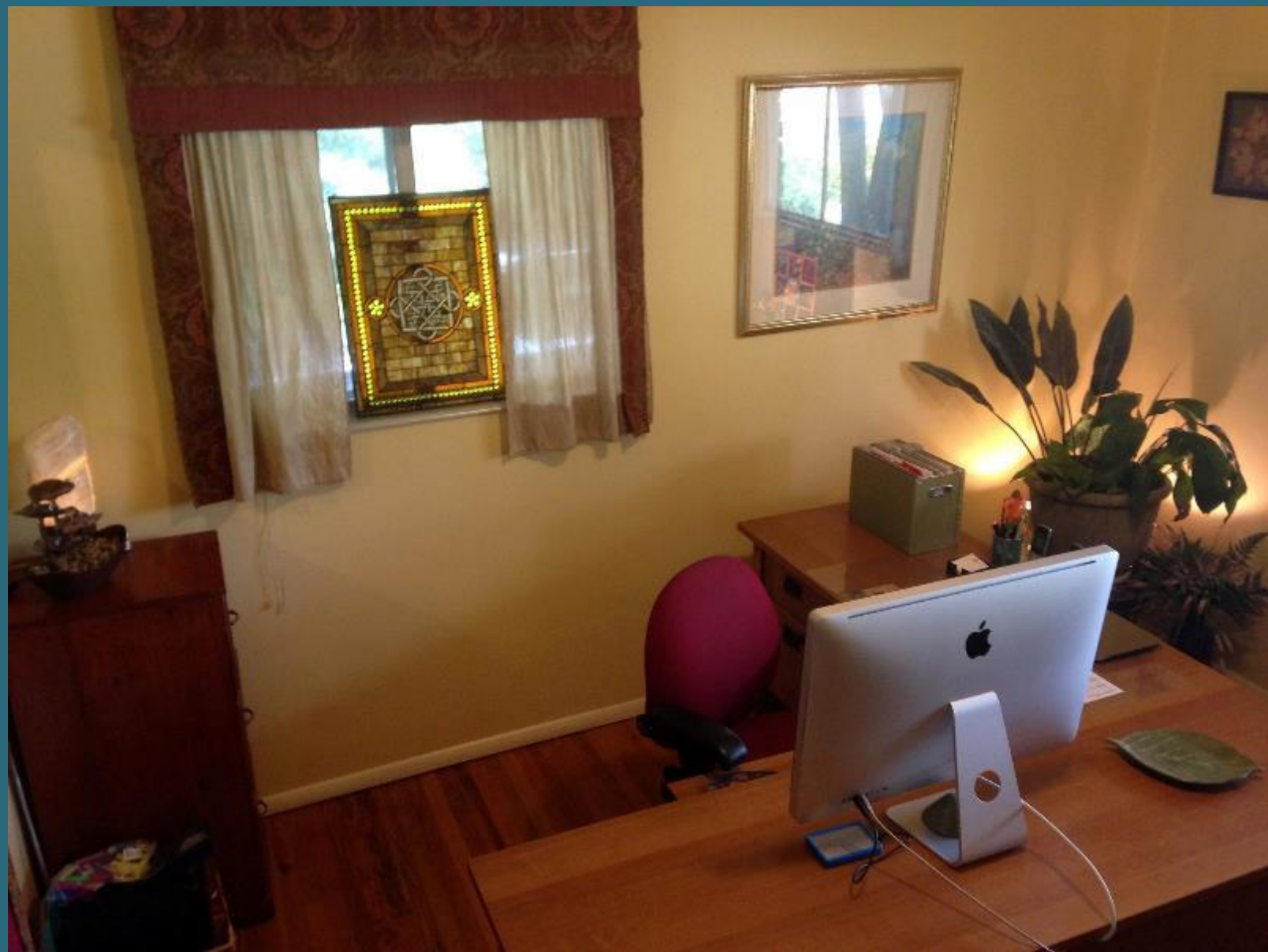
S.T.A.C.K.S.©



clear & SIMPLE™











EMILYLONDONPORTRAITS.COM



# **S Y S T E M**

**Saves**

**You**

**Stress**

**Time**

**Energy**

**Money**

# Three Step Organizing System

## SEE IT


Take a look at where you've been

## MAP IT

*Make a plan* for where you want to go

## DO IT

Take the actions to get it done


 **clear & SIMPLE**  
Our systems make organizing simple.

SEE IT • MAP IT • DO IT®

### The Foundation System

Take each step below in order to save time, energy and money.

	PURPOSE	ACTION Choose One	REWARD
SEE IT	Take a look at where you've been.	<ul style="list-style-type: none"><li>• Write the story your clutter tells.</li><li>• Draw the story.</li><li>• Take pictures.</li><li>• Answer questions:<ul style="list-style-type: none"><li>• What is working?</li><li>• What is not working?</li><li>• Where are you stuck and why?</li></ul></li></ul>	You have a clear picture of where you are now.
MAP IT	"Make a Plan" for where you want to go.	<ul style="list-style-type: none"><li>• Do a mind map</li><li>• Make a list or create a chart.</li><li>• Create a visual picture by drawing or Pinterest or other modality.</li><li>• Write a description of your top three priorities.</li><li>• Write how you want the project to look, feel and function.</li></ul>	You have a map to guide, inspire, and move you forward.
DO IT	Take the actions to get there.	<p>Work through the S.T.A.C.K.S.® system on the opposite side.</p> <p>S - Sort T - Toss A - Assign C - Contain K - Keep it up S - Simplify</p>	You have a system that will take you through from start to finish.

 Our steps make organizing easier!

ClearSimple.com • 801.463.9090

# SEE IT ©

Take a look at where you've been  
and where you're at...

# The Ultimate Office Checklist





Write the story your clutter tells.

Draw the **story** your clutter tells.





## Ask yourself:

1. What's working? – I have a dedicated office space
2. What's not working? – There are piles of paper everywhere
3. Where am I stuck and why? – I don't have a system or place for the paper to go until I can deal with it.



SEE IT literally by  
taking pictures.





# MAP IT ©

“Make a plan” for where  
you want to go

# Write your vision

## What do you really want?



### Look

- Beautiful & Open

### Feel

- Inviting and fun to be in, happy

### Function

- Organized zones with everything in place, productive

# The Ultimate Office Checklist



# Fabulous Furniture

- A great desk – U SHAPE
- Lateral file drawers
- Best chair you can get
- Bookcase and reading chair



# “I” Shape Desk Surface



# “U” Shape Desk Surface



# Design & Ambiance



# Excellent Equipment



# Supplies Contained

- Within Reach
  - Two desk drawers with active supplies
  - Needed paper, purse, calendar
  - Technology
- Nearby
  - Less active supplies
  - Other files and storage



DO IT ©

Take the steps to get there

# S.T.A.C.K.S.®



clear & SIMPLE  
Our systems make organizing simple.

## S.T.A.C.K.S.®

### The Action System

Take each step in order and make only one decision at a time.

	QUESTION	ACTION	TIP	REWARD
<b>Sort</b>	What is it?	Sort into piles of like with like.  No other decisions yet!	Place items in banker's boxes. Label each box with a post-it note for steps ahead.	You will know exactly what you have.
<b>Toss</b>	Do I need it or want it?	Put it in the keep or discard pile.  Tackle one pile or box at a time.	Ask, "Does this serve me in my life today?"  Only let go when you are ready.	What you have left is what needs to be organized.
<b>Assign a Home</b>	Where does it go?	Identify how you use the item and create activity zones accordingly.	Place the items you use most often in the easy-to-access locations.	Everything will be where you need it when you need it.
<b>Contain</b>	What does it go in?	Measure the "stuff" and the storage area before shopping.	Choose containers that are both functional and fun.	You will enjoy retrieving and re-storing your items.
<b>Keep it Up</b>	How do I maintain it?	Ask what needs to be done daily, weekly, monthly and annually.	Place your map in sight and do your upkeep at a high energy time.	Your keep-it-up system will make maintaining your space easier.
<b>Simplify</b>	How can I simplify and live with less?	Decide whether any new items pass the test. →	Does it serve me? Do I love it? Will I use it? Do I have room for it?	You will feel free, energized, and abundant.

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# ONE Step at a Time

- SORT
- TOSS
- ASSIGN
- CONTAIN
- KEEP IT UP
- SIMPLIFY



# Sort

What is it?



# SORT into hanging file folders





# Toss ©

Do I need it or want it?





## RECORD RETENTION GUIDELINES

Item	How long to keep it
Automobile records (title, registration, repairs)	For as long as you own the vehicle
Appointment books (past)	For 1-10 years (or longer) according to your comfort level and whether you use them for tax records, reference, or memorabilia
ATM slips (typically kept with bank statements)	Maximum seven years if needed for tax purposes**
Bank statements (Only keep cancelled checks or duplicate/carbon copies of checks if that is your only record.)	Maximum seven years if needed for tax purposes**
Credit card statements	Maximum seven years if tax-related purchases; statements, otherwise, until annual interest statement is supplied by company
Catalogs & magazines	Until the next issue
Dividend payment records	Until annual statement is supplied by company, then just annual statements
Household inventory & appraisal	As long as current
Insurance policies (auto, homeowners, liability)	As long as state of limitations in the event of late claims
Insurance policies (disability, medical, life, personal property, umbrella)	As long as you own
Investments (purchase records)	As long as you own
Investments (sales records)	Maximum seven years for tax purposes
Mortgage or loan discharge	As long as you own, or seven years after discharge
Property bill or purchase	As long as you own the property
Receipts	
Appliances (Attach the receipt to the Owner's manual.)	As long as you own item
Art, antiques, collectibles (Attach the receipt to the paperwork or certificate.)	As long as you own item
Clothing	For the length of the returns period, unless tracking household budget
Credit card slips	Until statement comes and you can match purchases
Furniture (Attach the receipt to the paperwork or certificate.)	As long as you own item, in case repairs needed
Home improvements	As long as you own home, or seven years after sale
Household repairs	For life of warranty, or longer to track liability record of service people and their rates
Major purchases (Attach the receipt to the paperwork.)	Life of item
Medical billings	Maximum seven years
Medical records/history of any major test/illness	Keep permanently
Rent receipt	Your cancelled check is sufficient



# Assign

Where does it go?



Zones – clear work area, incoming, action, to sign, conference area



# Contain

What does it go in?







# Keep It Up

How do I maintain this?



# Set aside time daily, weekly, monthly, quarterly, annually



# Simplify





One hour clean out of  
the STUFF that is:

---

1 – PAST Time

2 – NOT Yours

3 – NOT Here





“Our day is doomed before we even start because we created either a completely unrealistic plan or no plan at all.”

Erin Elizabeth Wells

**[ChosenCourse.com/PowerfulDay](https://ChosenCourse.com/PowerfulDay)**

Only YOU can do  
what only you can do...

# SEE IT

15 minutes to discover  
**what is going on** inside you!

# MAP IT

Ask what are the **3 most important** things for the day and  
write them down!

# DO IT

Decide when you will  
**act on the top three!**

# Here's how it works...

1. US Chamber P.P.

2. Plan September  
and this week.

3. Admin & Money \$

Monday 

DATE 09 02 19

TOP PRIORITIES

- ✓ 1. U.S. Chamber P.P.
- ✓ 2. Plan Sept. + week
- ✓ 3. Admin + \$ items

TO DO LIST

- ✓ Four Factory Tickets
- ✓ NSA Membership
- ✓ Oshen Docs sent
- ✓ MGS Newsletter
- Send Bday Cards

NOTES

SIMPLE eBook  
Bundle - ck out

DAILY SCHEDULE

TIME	EVENT
6:00 AM	Self time
6:30 AM	- desk meditation
7:00 AM	- plan day
7:30 AM	- Bob time
8:00 AM	
8:30 AM	Breakfast + get ready day
9:00 AM	
9:30 AM	Planning - with + week
10:00 AM	
10:30 AM	U.S. Chamber P.P.
11:00 AM	
11:30 AM	
12:00 PM	Sylvia - weekly call
12:30 PM	
1:00 PM	Lunch + pers. calls
1:30 PM	
2:00 PM	Admin + emails
2:30 PM	
3:00 PM	\$ items for month
3:30 PM	
4:00 PM	NAP
4:30 PM	
5:00 PM	
5:30 PM	
6:00 PM	Lisa Birthday Party
6:30 PM	
7:00 PM	
7:30 PM	
8:00 PM	

TUL

