The Six Step Organizing Process Worksheets
Organizing Connection has designed the following worksheets as a tool to aid you in your organizing journey. The worksheets are designed to help you capture your thoughts, dreams, and visions on paper and support you in reaching your organizing goals. We suggest that you use the worksheets with the corresponding videos and ebooks to cover all your particular learning styles.

The worksheets will walk you through a six step process. This process will help you break down the large and often overwhelming task of taking on a new organizing project and approach it in smaller manageable steps. Depending on the size of your project, you will decide how much time is needed to be allotted for each step and set up a schedule to complete the whole process.

The six steps that you will go through in the work sheets are as follows:

1. The Dream – How do you envision your new dream space?
2. The Plan – What steps will you take to make the dream come true?
3. The Sort – Sort through everything, putting like with like, into categories.
4. The Purge – Deciding what to keep and what to let go of.
5. The Re-Organization – Put what you are keeping back, making sure everything has a home.
6. Maintenance – It’s an evolving journey, how to stay organized!

Well, what are you waiting for? Let’s get started, and remember if you ever get stuck, overwhelmed, or just want to bounce your ideas off of someone else, come join us at OrganizingConnection.com. We are here to make your organizing dilemmas a thing of the past. You can find all your organizing answers at www.organizingconnection.com.
This is where you get to jot down the things that are not working in your home and exchange them for what you do want your dream space to look like.

Don't know where to start? Can't see past what's currently happening?

Pretend no one is watching or judging what you are thinking. Not even you! Just write what you are feeling, let the thoughts pour out and you may even surprise yourself.

<table>
<thead>
<tr>
<th>Your Current Reality (The Now)</th>
<th>Your New Reality (The Dream)</th>
</tr>
</thead>
<tbody>
<tr>
<td><em>In this column list everything about the situation as it is now. Include both the good and bad points.</em></td>
<td><em>In this column list the elements of your dream, laid out just the way you want it.</em></td>
</tr>
</tbody>
</table>
In the Dream you created a vision of what a situation could be. Now it's probably scaring you – how to go from here to there? Now think of **five** actions you can take to reach this goal.

<table>
<thead>
<tr>
<th>Action</th>
<th>Date done by:</th>
<th>People doing it:</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
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<td>5</td>
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</table>

Note the last two columns: "Date done by" and "People doing it." An action won't happen if it doesn't have a deadline or if no one is responsible for getting it done. Even if you're working on a project alone, put your name in the final column and commit to completing the actions towards your New Reality.

If the five actions above are still too overwhelming, repeat this exercise by making each action a Dream and create new sub-actions to reach each one. Remember everyone gets to their destination at their own pace.

Here's an example to get you started:

**The Dream of a hassle free morning routine**
For many people, whether you live alone or with a partner and children, mornings are difficult. Let's pretend you want to create an ideal morning routine that includes: getting up on time, having a nutritious breakfast, remembering to take the things you need for the day, and having a smile on your face as you pull out of the driveway. Wow…what a dream.

<table>
<thead>
<tr>
<th>Action</th>
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</tr>
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<tbody>
<tr>
<td>• Get up on time by setting the alarm 10 minutes earlier (allowing for one glorious snooze).</td>
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<tr>
<td>• Ensuring breakfast with meal plans and weekly grocery shopping.</td>
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<tr>
<td>• Getting the days items ready the night before.</td>
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<tr>
<td>• Visualizing a great day.</td>
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When you sort, you put like with like. For things, some people think in terms of size, some by function, and even some by color. The most common sorting scheme, and the one most used is by function. In a kitchen for example, utensils are in one group and bake ware in another. In a bedroom, winter clothes are separated from summer clothes and underwear from both.

Activities can also be sorted. For example, a typical day might include:
- getting the family ready for school/work
- home maintenance
- extracurricular activities
- meals, and
- fun-time.

So, how's the sorting done? That part's easy – looking at each object or activity and deciding in which category it belongs. The tough part is coming up with the categories and sticking to them. Practice creating categories with this exercise:
- Tour your house, room by room
- In each room, name five broad categories of things
- For each category, name three things in the room.

Get other family members to do the same and discover how each person processes information.

When actually organizing a room or a process, you'll want to write down the categories and subcategories. We've provided a sample category below using the kitchen.

Sometimes it is more beneficial to physically remove all the objects out of the room you are working in so you start with a clean slate. For physical spaces, you may need to create separate piles of the samples, or if they are small things, put them in separate baskets. Write the category on a piece of paper and put it in front of the pile, or if using baskets, attach the paper to the front where you can easily see it. Finally sort everything in the space into the piles.

e.g., Utensils
Spatulas, Whisks,
Tongs, Potato Masher,
Rolling Pin
Ladle, Wooden Spoon
The purge is all about making decisions, so we've created a few decision making tools just for you.

**Decision Tool 1: The Quick Quiz**

Ask yourself the following questions:

- Have I or anyone in my home used this item in the past year?  Yes / No  
- Will it be needed on a definite date in the future?  Yes / No  
- Do I love it or does someone in the household love it?  Yes / No  
- Does this item serve a worthwhile purpose in my life?  Yes / No  
- Do I need to keep it for legal or tax purposes?  Yes / No  
- Is it more important to me to keep this item than to have the space it occupies?  Yes / No  
- Would it be difficult or expensive for me to get another one?  Yes / No  

Scoring: There is no right or wrong answers, but a “Yes” answer to any one of the above questions provides a sound reason to keep that item. If you answer “No” to every question, toss it. If you are having a difficult time with this invite a friend over and have them ask the questions.

**Decision Tool 2: Whittling It Down**

Mark off half-an-hour with no distractions for the following exercise:

1. Pull everything into a pile and sort into the following categories quickly (Use your intuition and move quickly)
   a. I will use it for certain by a specific date.  
   b. I won’t use it but have to keep it (legal requirement only)  
   c. I won’t use it but I just like it (sentimental)  
   d. I don’t need it/won’t use it.  
   e. I might use it sometime in the future  
2. Put the things from pile "A" away, in a place that is easy to access.  
3. Store the items from pile "B" in well labeled containers.  
4. Put the items from pile "C" in a memory box or put it on display somehow.  
5. Dispose of pile "D" as soon as possible (recycle or give away what you can, then garbage the rest).  
6. For pile "E" ask yourself the following questions:
   a. Who gave this item to me?  
   b. What is important about this item?  
   c. How would I use it?  
   d. Where would I use it?  

Now that you have asked yourself these tough questions about this final pile, you can be clearer as to whether you need to keep it or let it go.
Wow, look what you have accomplishment so far!

- You've created a dream or vision of what you want.
- You have a plan on how to make the dream a reality.
- You have broken it down into categories with the sort.
- And in the purge you learned how to let go of the unwanted/unloved items.

You've sorted, you've purged and now you have to put it all back. Yes, that's right… put it all back. But don't worry, we're here to help.

How you re-organize everything is incredibly personal. No matter how individualized you make the reorganization, however, if you keep these questions in mind while working, you shouldn't have any problems.

- How do I want this space to function?
- Does it make sense to have this item here?
- Can I find this item in 5 seconds or less if I put it here?
- Do I feel good with this item here?

You're done, right? Not quite.

Use this worksheet to compare your desired reality (the Dream) with what you've actually come up with (the Reality Check). The actual doesn't need to match the dream exactly. The comparison is just to highlight details that might have escaped notice during the sorting, purging, and reorganizing.

<table>
<thead>
<tr>
<th>The Dream – Vision of What You Want</th>
<th>The Reality Check – The Actual Outcome</th>
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<tbody>
<tr>
<td>What was that again…..if you don't remember check back on the Dream worksheet.</td>
<td>Walk through your space and note everything you've changed, or left as is.</td>
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</table>
Organizing isn't a one time project. It's an evolving journey, one destination leading to the next. Yes, this means that staying organized involves maintenance.

It takes at least 21 repetitions of an action or a way of living to make it a habit. As we use most spaces every day, this means it takes 21 days to determine if your organizing project and the systems you have put in place have created new habits.

Use this worksheet to determine how well you're doing with the maintenance. When 21 days have passed from the original reorganization, examine your space or activity again to see what works and what needs to be tweaked.

<table>
<thead>
<tr>
<th>21 Day Check Up</th>
<th>Fine Tuning</th>
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<tbody>
<tr>
<td><em>In this column list everything about the space or activity as it is now (positive and negative).</em></td>
<td><em>Note here what needs to change to make the system better.</em></td>
</tr>
</tbody>
</table>
Unless you live alone, organizing is not a solitary task. There are others who use the space and need to provide input (and assistance) on the final outcome. Remember, if you don't include them, they're less likely to keep up what you've worked so hard to create, basically wasting all your time.

So, how do you get this input (and assistance)?

**With a family meeting.**

Family meetings aren't just for large projects like organizing. They're also a good idea for any burning issue (and we don't mean the smoking roast forgotten in the oven).

When you hold these meetings depends on how often the family sits down together. A family that eats dinner together every day would likely only need a family meeting on special occasions. A family with busy schedules might need a weekly meeting to ensure good communication. Here are some issues that might require a family meeting:

- Morning routines
- Homework
- Chores
- Family activities (aka, the fun stuff)
- Respect issues (e.g., walking into rooms that have closed doors)
- Money
- Or anything else that someone in the family deems important.

**Rules of engagement:**

- Start the meeting with something positive like pointing out good things that were done prior to the meeting.
- Address all outstanding issues.
- Allow only one person to talk at a time. Use a talking stick!
- Let everyone have the right to contribute to every topic.
- No finger pointing or name calling.
- End with something fun; a game, special dinner, an outing, a bike ride, or a family walk

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