

White Paper

➤ Professional Organizers want more revenue!

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The rapidly changing character and increasing complexity of the organizing industry demands continuous updating of all successful organizers' knowledge, skills and understanding. Having the right combination of skills, knowledge and experience is mandatory for survival.

Through hands-on experience in multiple markets over the past ten years, including residential and business, I have had the opportunity to observe and identify what I believe are the top three success factors for growing your business in this industry:

1. Market your business continuously ~ don't stop for a minute, keeping your eye on your existing client base as well as your potential client base.
2. Maintain focus ~ understand and respond to your market and your clients by continuing to develop services or products that they cannot do without!
3. Recognize that you cannot do it all ~ the old phrase, "Do what you do best and hire out the rest.", is so true!

Marketing ~ Understand that you need to do this every day. For a lot of us, in the first few years of our organizing businesses, we knew that this needed to be done and we did it. Our businesses grew and things were good. The problem here is that when business is good, we stop marketing! And guess what; a few months down the road, business is not so great any more. We cannot let our guard down for one minute. Now this is not to say that the marketing activities for your business become all consuming. You need to organize this part of your business life in the same way that you organize your clients. Sit down, lay out a plan, and define what it is you are going to do preferably every day but at the very least, every week in the way of marketing activities. I remember hearing an expert speak at a NAPO conference a few years ago and the one message that I came away with loud and clear and still remember to this day is...don't let a day go by where you have not performed three income producing activities!

Marketing is such a broad term and can be so many things to so many businesses. To try to keep some focus, the marketing activities that seem to work best in our industry are: networking and referrals ~ basically word of mouth. So, incorporate the following activities into your plan ~ whether they are your local BNI meetings, Chamber of Commerce meetings, women in business groups, charity events where you donate an organizing project to gain some visibility, or other events unique to your target market. Make sure that you are participating in one of these events weekly. Have a referral program in place and work it with your existing client base. Offer your clients a free hour of organizing for every client that they refer to you that books more than 3 hours of your

services. Develop strategic partnerships with a real estate agent, a home stager, your small business bank manager. Include these folks in your referral program. Design and hand out referral cards. These can be as simple as a business card produced using software such as the Avery software templates you can access at www.avery.ca or www.avery.com. Educate these strategic partners on your services and keep educating them about your services. Offer these folks free mini-organizing seminars. Let them know that you are a “state of the art” organizer when it comes to organizing services in your area of specialization.

To be that “state of the art” organizer you need to continuously seek out education, learn about new tools, especially technology tools, and turn this knowledge into services you can offer your clients. Staying focused on your market, your specialization, and who your clients are will help you to develop a list of services that will match their needs today and in the future. Having this knowledge increases your creditability and reassures the client that they have the best person for the job!

One of the big areas for organization is “Paper”. Paper in itself sounds very simple, easy to organize, but as an experienced organizer knows, when you get in there and start organizing the paper, you realize very quickly that you need a more sophisticated approach than just sticking papers in files, in both the business and residential world! This latter approach gets us nowhere with our clients on an ongoing basis....they don't see the value!

Understanding the world of Records/Information Management (RIM) is critical! This knowledge allows you to deliver effective, value-added services to your clients. This is an area that is exploding in our industry, the organizing industry! To organize people's information, paper and electronic, you need to understand the basics of RIM and where do you start to create an approach to organizing client's information? This applies in the home and in the office.

It starts with a plan and then a step by step approach to organizing a client's information. One of the key pieces in this approach is the development of a Classification Scheme that is applied across all types of information ~ paper or electronic. A comprehensive discussion on this topic is not possible in this white paper but for now, understand that it is basically the categorization of information into what is called “Record Series”. Each record will have a primary category and potentially numerous sub-categories. An example of a basic set of primary categories that we use going into a small business environment are Administration, Clients, Finance, Human Resources, Legal, Marketing, Operations, Personal, Products/Services and Reference/Research. Each primary category would then drill down into sub-categories, as an example under Finance you would have Budget, Expenses, Cash flows,

Payables, Receivables, etc. Keep in mind this is a starting point for any small business and this list must be customized for every client in order to develop an effective Classification Scheme to meet their individual needs. A Retention Schedule must also be developed to support the Classification Scheme in order that your clients understand the legal retention requirements for each record series. In other words how long do they have to keep it!

And the third area, “recognizing that you cannot do it all”, is where the client is most well served. Becoming a one stop shop can expand your services and make it much more attractive to your clients. Bringing experts to the table when needed makes life much easier for your client. Understanding retention schedules is a great example of “do what you do best and hire out the rest”. This is one area where you can either refer the client to the variety of government websites to obtain this information for themselves, or preferably, you can incorporate this service into your overall service delivery and hire an expert in the field of information retention requirements. You might also consider hiring a researcher to stay on top of technology for you as this is a very time consuming activity. If your strength is not in design, then consider partnering with an Interior Designer. In the business office environment perhaps an architect, a space design expert or an ergonomics specialist. Outsourcing can be surprisingly affordable and it eliminates the steep learning curve because while you are on that curve, you are involved in non-income producing activities. Stop procrastinating and get someone else to do the work for you. Outsourcing is an excellent strategy to keep you focused.

Be sure that you keep these top three success factors front of mind. Keep focused and do not spend a lot of your time and resources getting good at a lot of things that aren't important.

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