

CHAPTER 3

Are you organized— or out of control?

Chaos often breeds life, where order breeds habits.

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OVERWHELMED AND OVERWORKED

It appears that the more technologically streamlined we become with time-saving gadgets (like e-mail—hah!), the more we feel overwhelmed and overworked. How on earth did the Stone Age people manage? I mean, hunting, dragging, skinning, cutting up, cooking and eating those dinosaurs was a mammoth job (no pun intended). What do we have to complain about?

Yet with all today's time-saving devices, still no one has enough time. "I'm too busy!" is the universal cry of entrepreneurs and employees alike. For entrepreneurs, attending to 60 different jobs is sometimes impossible, so of course, hiring help is the most practical solution. But for many fledgling businesses, this isn't yet an option as the money isn't available. What to do?

GET ORGANIZED

Simply stated, you have to become organized. "Oh, that's easy for you to say," you think, "but how?" One young woman who started a retail fish store with her partner complained one day, "No one told me it would be like this! I have to be up at the crack of dawn to go to the fish market, I'm open six days a week, there's so much to do in the store that I never have a moment to even think of writing up my books, let alone do anything for myself. It's a 12-hour day or more just in the store!"

BIG IDEA: SET GOALS AND PRIORITIZE



Many challenges can be overcome by learning to be more focussed and methodical in your daily routine. If goals and priorities are set and the small jobs are attended to in an orderly fashion, they cease to become overwhelming mountains.

THE CYCLE OF BUSINESS

Reread the section in Chapter 2 about the 60 different integral functions involved in operating a successful business. All business functions can be organized into a monthly cycle, which in turn can be broken down into weekly, and then daily cycles.

The most necessary functions that cannot be ignored on a daily and monthly basis include:

- attending to telephone calls, faxes, e-mail and correspondence
- follow-up, networking, marketing, job quotations, purchasing
- billing customers, banking, paying the bills, reviewing finances
- calculating and paying provincial, federal and personal taxes
- updating accounting records, collections, planning cash flow
- keeping abreast of news, industry information and changes.

Let one of these areas become unorganized or neglected and the business will suffer. As a business grows, systems must change and become more sophisticated. This means getting rid of the shoebox system. Successful businesses rarely operate from shoeboxes. To accomplish all that you set out to do, you and your office may need some reorganization. Let's start with *you*.

ORGANIZE THE MANAGER: MAKE TIME

Multitasking is mind-cluttering

According to Thomas Davenport and John Beck of the Accenture Institute for Strategic Change, most businesses today suffer from some degree of

organizational ADD—Attention Deficit Disorder, brought about by too much multitasking and lack of focus. A report published by the American Psychology Association states, “Not being able to concentrate for, say, tens of minutes at a time, may mean it’s costing a company as much as 20 to 40 percent in terms of potential efficiency and productivity due to multitasking.” Imagine what you could do with an extra eight to 16 hours a week!

WHICH TIME ZONES ARE YOU OPERATING IN?

Rand Stagen, of the Stagen Leadership Institute (www.stagen.com), clearly demonstrates in his Time Zones Model™ how easy it is for us to waste time and, in doing so, not accomplish our goals. He divides time into four time zones:

- **Proactive zone:** strategic thinking and planning, preparation, building reserves, maintenance, renewal
- **Distraction zone:** unnecessary interruptions, distracting calls and e-mail
- **Waste zone:** inefficiencies, trivial activities, excessive entertainment
- **Reactive zone:** urgent demands, crisis, stress.

He advises that productivity can be significantly increased and stress decreased by:

1. Increasing your awareness of which time zone you are in at any given moment
2. Avoiding distractions and minimizing waste by asserting boundaries and raising standards
3. Reinvesting the time you’ve saved into being more proactive and strategic.

GET YOUR RPM GOING: REVIEW, PLAN, THEN MAP YOUR TIME

Realizing that I was becoming a victim of the “time crunch n’ munch,” with what appeared to be an overwhelming workload in an impossible time frame, I sat down and decided to see if what was ahead was able to be accomplished. Developing a weekly time map was the end result—a system along with some helpful tips that I have been able to share with many entrepreneurs. Keep on track with a time map, an example of which is Figure 3.1.

Figure 3.1: HOW TO USE A WEEKLY TIME PLANNER

Weekly Time Planner: Week of _____ to _____							
	Monday__	Tuesday__	Wednesday__	Thursday__	Friday__	Saturday__	Sunday__
8:00	Breakfast and Treadmill				<i>Airport to Calgary</i>	<i>Pickup at Hotel</i> ↓	Sleep In
9:00	Practise Keynote	Practise Keynote	Practise Keynote	Phone, E-mail	↓	<i>Deliver Workshop</i>	↓
10:00	Prepare Handouts ↓	Follow Up: Phone, E-mail	Follow Up: Phone, E-mail	Follow Up: Phone, E-mail	↓	↓	↓
11:00	↓	Workshop Material	Handouts M/Planner	Practise Keynote	↓	↓	Eat Fitness
12:00 Noon	Lunch CBA	Lunch <i>Hair</i>	Lunch Rewrite	Lunch Pack for Calgary	↓	<i>Flight</i>	Clean Stalls
1:00	Material	↓	Keynote		<i>1:30 Coach</i>	↓	Grocery Shop
2:00	<i>Dentist</i>	↓	Make Up Lost Time		<i>Speaking</i>	↓	↓
3:00	Time with Katrina	Prepare Materials	Overheads	Prepare Home for Away	↓	↓	↓
4:00		↓	↓	<i>Chiropractor</i>	↓	↓	↓
5:00	Dinner Chores	Dinner Chores	Dinner Chores	Dinner Chores	Make Up Boxes	↓	↓
6:00	↓	<i>Board Meeting</i>	↓	Dinner	<i>Dinner</i>	Dinner CAPS	Chores
7:00	↓	↓	Handouts	<i>Library Seminar</i>	Practise Review	↓	↓
8:00	Board Meeting	↓	Material	↓	Gym	<i>Airport</i>	Weights
9:00	Weights	↓	Weights	Pack	Practise	↓	Office
10:00	Lock Up	Lock Up	Lock Up	Check	Bed	↓	Lock Up

Step 1: Review

Each weekend, plan the following week’s activities by first referring to the appointments in your planner. Transfer the time blocks onto your weekly time planner, noting in each block what you will be doing. Then colour over these sections with a pink highlighter. These are committed time blocks.

Step 2: Plan

Using a priority list, next list each job on a column pad. Head the columns Job, Deadline Date, then determine each one to be an A+, A, B and C in priority. List everything you need to accomplish that week, including important work, growth planning, phone calls, follow-up, and administrative work. You often find that “C” priorities don’t really need doing. Cleaning filing cabinets is usually a “C” priority that I tend to neglect, until I eventually set aside a morning, or I try to clean them as I use each one.

Step 3: Map

Next, review each day of the week, then block out all your personal time, from the moment you get up to when you officially “switch off.” Include meal breaks, family commitments, travelling, shopping, fitness, volunteer work and entertainment. Colour these sections with a blue highlighter.

BIG IDEA: YOUR MAP IS YOUR MASTER



Keep the time map in front of you on your desk or workbench. Refer to it regularly throughout the day. It becomes your “boss” and will help you stay on track. As you accomplish each task that is on your priority list and time map, cross it off and give yourself a pat on the back.

Step 4: Manage focussed time

What you now have left on your time map are the spare “golden” time blocks to complete your “A+” and “A” priorities. You may be surprised at how little time you have left. Use the remaining time blocks to map in what must be accomplished by the end of the week. Estimate the time that each job will take, allocating smaller jobs—such as administrative functions—into grouped time blocks (e.g., one hour for follow-up and paying accounts). Colour these blocks in a bright yellow highlighter so that they stand out. Ensure that some of this golden time encompasses some growth planning.

REAL LIFE: NO TIME FOR BUSINESS

Jeremy had worked in the family appliance business for many years and knew it inside out. It became too easy to get involved in the day-to-day minor calamities, so he often returned home feeling that he hadn't accomplished anything.

After attending my workshop on time management, he got excited about the idea of time mapping, and sat down during lunch to start mapping out his time to make room for follow-up.

"I'm so excited!" he told me after the break. "I realize now that I was wasting my days, and now I have organized them to incorporate follow-up and some projects that have been put off for a long time."

Returning home from the conference, he reorganized the parts inventory, which was a real mess, and got on the phone to customers and prospects, easily drumming up new business. It felt good. But after a couple of weeks, he allowed the small stuff to get in the way again so he let go of the time-mapping. I called him to check up, suggesting that he get back on track, delegate more responsibility and decision-making to his employees, and try allocating just a half-hour a day to follow-up and special projects.

"It did feel good getting all that done," said Jeremy. "I realize now that I have to keep doing this to break the bad habits. The business is there waiting for me—I just have to make the time to pick up the phone and go after it."

Map your own time

Figure 3.1 represents one of my "weeks from hell." However, by time-mapping two weeks ahead, everything was accomplished, with time to spare. The time blocks in ordinary type represent the "blue" or personal time. Those in italics represent "pink time," appointments and travelling, and the bold blocks represent the "golden" planning and focussed time. Try your hand at preplanning your next week.

BIG IDEA: SCHEDULE IN EVERYTHING



To ensure that you allow for every contingency, block out time for travelling to appointments, parking and networking. Schedule in some planning, “thinking” and closed door time when you can be completely focussed. Allow a couple of hours of catch-up time for emergencies or distractions. Block time each day for follow-up and marketing.

ORGANIZE FOR THE “FIVE Fs”

“We work to live, not live to work” is a popular saying. However, for some, the reverse is often the norm. What good is success, money or fame if you don’t have a happy family life, inner peace and happiness? An unbalanced life creates damaging physical and mental stress. You become less productive and less motivated.

As you plan each week, make time for life’s important “Five Fs”:

1. **Fitness:** Exercise aids positive, creative and clear thinking—and your health. It’s amazing the benefits one feels from just a half-hour walk or work-out. Your weight will decrease and productivity increase.
2. **Food:** Learn to make healthy choices, and eat regularly. Ditch the junk food. Keep the machine fuelled with good premium “gas.” Don’t skip meals and include a balance of food groups.
3. **Family:** They are the most important people in your life yet often the ones to suffer. Plan small chunks of quality time with them and ensure that it *is* quality time.
4. **Friends:** More and more people who work long hours are complaining of spending little time with friends. Make a point of scheduling in some much-needed time with them. Never be “too busy” and neglect your friends—you need them more than you think.
5. **Fun:** Think positive and be positive. Let yourself go and have a little fun.

But 24 hours is not enough—right? Wrong!

No one can argue that there are only 24 hours in a day. Yet these days, many people feel they have no time for themselves, and certainly little time for the “Five Fs,” particularly fitness. So here is the solution. Take the 24 hours and divide them into 48 half-hours. If you can’t find one-fiftieth of a day for yourself for fitness and another fiftieth for your family, then you seriously need to review your lifestyle and make some radical changes.

BIG IDEA: INVOLVE THE FAMILY IN FITNESS

If your teenager (or dog) is suffering from lack of exercise, why not share your fitness time with them? Dogs and children can go for a short walk with you. For mothers with teenage daughters, why not join a gym together? Personal trainers will also come into your home and set up programs, so there’s really no excuse, is there?

ORGANIZE THE OFFICE: MANAGE TIME

If you are currently sitting in an office piled high with junk and papers, you will need some basic organizational equipment, so go out and be prepared to spend some money on these valuable tools. There is a huge assortment of organizational products available to suit both your budget and personal taste.

Use the 20-second filing system

Once you have purchased the right tools, you can get down to organizing your office. Filing cabinets are usually the office’s hidden disaster zone. Using this system following, theoretically, you should be able to find any piece of paper within 20 seconds. Remember, a cluttered desk and office equals a cluttered mind, so here are some tips to de-clutter both:

- When bills are received, check them for accuracy and attend to any anomalies. Then file them alphabetically in an “accounts to be paid” file.

If you have a large volume of monthly accounts, you can use either an expanding file or a separate folder for regular suppliers.

- Keep a graduated file holder on your desk with files you will be working with that week.
- Keep a weekly follow-up file and review it daily during your planning time.
- You'll probably never clean out your whole filing cabinet at once, so each time you pick up a messy file, quickly clean it out before you put it away. Put a small coloured dot on the file so you know it is cleaned out. Use a different coloured dot each year.
- File paid accounts alphabetically and then chronologically. Use a separate folder for the suppliers you use the most and a "miscellaneous" file for occasional suppliers. File the last-paid invoice at the front in case you need to refer to an invoice.

BIG IDEA: COLOUR-CODE FILES



To easily locate files in your cabinet, use the colour-coding system. Use different coloured suspension files and matching file folders to house the various categories of paperwork (e.g., projects, marketing information, customer files, etc.) with matching colour tabs to index them. To keep individual files organized, use a two-hole punch at the top of each folder. Fasten the papers in chronological order with metal fasteners. This prevents papers from getting lost or out of order.

ORGANIZE YOUR FILES

There are some files that you should always keep in your cabinet, such as asset purchases, contracts, and correspondence from government and tax agencies. So that you can easily locate important documents, make separate files for the following information:

1. Business and tax files

GST; provincial taxes; workers' compensation; payroll; payroll guides; incorporation documents; asset register; insurance policies; shareholder's loan; telephone and equipment leases; CRA business number; licencing agencies.

2. Banking and financial files

Bank statements, cancelled cheques and posted cheque stubs; credit card contracts and information; bank and loan agreements; financial statements for three years; cash expenses, petty cash and expense reports belong here. Many of these are important files that should not be cleaned out and put into storage. Your asset register should contain all business asset purchase invoices. You will need this information for your accountant and for when you sell your business.

BIG IDEA: KEEP CUSTOMER FILES



It may be helpful for reference, purchasing, marketing and statistical purposes to keep customer information files with copies of quotations, correspondence and invoices. Because you need to keep a numerical copy of each invoice, you may have to print invoices with an extra copy to use in this file.

3. Sales invoices

If you bill just a few invoices a month, staple them together after posting to your accounting records and file them numerically. For a large volume of invoices, use binders. Save time by having the printer drill the invoices to suit your filing needs.

Voided invoices must be filed, or the tax department may think you are laundering money, so don't throw them away. All invoices should be numbered to provide an audit trail for both you and the tax audit department. Stamp all invoices "posted" when they are entered to your books. Keep unpaid posted invoices in a file for collection purposes.

4. Marketing files

Follow-up files (keeping follow-up files handy allows you to keep in contact with “work in progress”); media; corporate and personal profiles; testimonials; advertising copy; contact lists; correspondence.

UTILIZE YOUR FILING SYSTEM

Make your filing cabinet work for you. Use the top drawers for files that you use regularly, and store less-used documents in the bottom drawers. Follow-up and current customer files can be stored either on your desk or close to your regular work area by using the graduated file holder. This enables files to be at arm’s length and the tabs to be easily read.

If you use this filing system, making additions or deletions where necessary, you should be able to find any piece of paper within 20 seconds. When a customer calls and you need to refer to your files, they will be impressed that you don’t waste their time by shuffling through drawers. Efficiency in these situations can only be a positive in your customer’s perception of how you operate your business.

BIG IDEA: CLEAN OUT YEAR-END FILES



At year-end, you can empty the fiscal year’s files into storage boxes. Clearly identify the contents on the box before storing them. Store accounting records for seven years as the tax department could spring a surprise audit.

ORGANIZE YOUR COMPUTER

Computers are the lifeline of most businesses. With the number of viruses circulating in cyberspace and the unpredictability of software, back-up and regular computer maintenance is essential, because in most cases, no computer equals no office and often, no work. Here are some tips to help keep your computer information in order:

- **Back-up:** Use either CD-ROMS or a zip drive (approximate cost \$175) to back up files daily. Store disks safely, and keep another copy out of the office in case of fire or theft.
- **Word processing files:** Word processing programs are often unstable and can shut down. The written word is often lost forever—it's difficult to recapture original thoughts. Set your back-up timer to your desired time; every two minutes is ideal. You can change your back-up time using Help under the Windows menu.
- **Defragment the hard drive:** Once a month, go to Help and type in "defragment hard drive" or install Norton Utilities. This process will reorganize your hard drive to optimize space and efficiency. A large hard drive will take two hours to defragment.
- **Virus protection:** Don't switch on your computer without a good virus protection program running. Use the live update and scan function weekly or schedule the program to do it.
- **Contact management:** Use a contact management system to dispose of that drawer full of business cards you can never find. It may be as simple as using your Address Book in Microsoft Works, or a more refined software system such as Maximizer, Act or Goldmine.

ORGANIZE YOUR E-MAIL

E-mail is the blessing—and the curse—of business. It has encouraged us to become a disconnected society, hiding behind the keyboard instead of verbally communicating with people. It comes unwanted, unexpected and unplanned for. It saves and wastes copious time. Try these suggestions to better manage it:

- Turn off the e-mail notification sign and sound during focussed time.
- Set up in-box folders for different departments. Either have the mail directed straight to that folder or move important e-mails to those folders after printing out a hard copy.
- Block in time on your planner for checking and answering e-mail.
- Set up filters in your browser and contact your server to see if they can pre-filter mail. My Web site host now filters spam, and it has astoundingly cut it down by 75 to 80 percent.

- Although spam is illegal, some will filter through. Anti-spam software is effective, but watch for personal mail that can sometimes slip through.
- Set up e-mail so that it doesn't open automatically. Delete anything that is junk mail.

BIG IDEA: CLEAN OUT E-MAIL



It's too easy to let e-mails collect until there are a thousand messages in your in-box and sent files. Once a week, go to View on your toolbar, then Sort By, From, and your e-mails will be listed alphabetically. It's much easier to delete unwanted mail when it is grouped together by name, not date. It's amazing just how quickly you'll delete unwanted mail.

If you make a point of performing these simple functions, your computer and you will operate more efficiently and downtime will be kept to a minimum. Now you have to find the time to do all this, so the next thing to organize is your time commitments.

ORGANIZE AND MASTER TIME

Because time is so valuable and in such great demand, you need to put a value on yours and spend it wisely. Remember those four time zones? How much time do you spend in the distraction and waste zones? Here are some tips to help you better master time in three areas that eat up countless wasted hours.

Tame telephone calls

Because many businesses are so reliant on e-mail, the personal touch is often sadly lacking. However, the telephone can also become a time-munching enemy. Try these strategies to better handle those calls:

- During "focussed" time, put the telephone onto voice mail and screen calls, or instruct employees to handle any phone inquiries. It's surprising what you will achieve without interruptions.

- If someone calls to chat, explain you are on a deadline and politely ask if you could return the call later.
- Leave a message on your voice mail saying that you will return calls within two hours.
- Don't give customers your cell number unless it is an emergency. Use driving time to think, plan or listen to an educational tape or CD.

BIG IDEA: BE PREPARED FOR "DOING COFFEE"



"We must do coffee next week" can be an expensive time-waster. If someone wants to meet you for coffee (unless it's to your benefit), ask them to e-mail their questions. Then, when you meet, instead of going through the whole introduction and explanation routine, you can get right down to business. Let them know how much time you have and stick to that time frame.

Limit lunches and "doing coffee"

When you are invited out for lunch—which, of course, can be important for networking purposes—thoroughly examine the benefits of and reasons for going. Many experts find that people want to take them to lunch just to pick their brains and get free information. If you are feeling time-crunched, guard against coffee or lunches for frivolous reasons. Be selfish and ask yourself:

- WIIFM? (What's in it for me?)
- If there's NIIFY (nothing in it for you), graciously decline until you do have the time.
- Carefully choose the people you want to mentor and give free advice to. Set the parameters for the time you spend with them.
- Although time is of the essence, don't forgo an opportunity to meet an important contact face-to-face. More business can be transacted in one short meeting than by copious phone calls or e-mails.

BIG IDEA: CAPTURE THAT BIG IDEA



Many great ideas are lost because there is no pen and paper available to write them down. Purchase a mini-recorder with a headset. Then, when you are driving, or even out walking, and you think of something you need to remember, record it on tape for when you return to the office.

Manage meetings

Countless conferences and meetings have been rushed, ruined or have gone overtime because the agendas were not carefully planned. When you plan a meeting, take these factors into consideration:

- **Budget for contingencies:** Schedule in a few extra minutes to allow for latecomers or problems with equipment or seating.
- **Carefully plan agendas:** Allow time for clapping, introductions, thank-you's and handshakes, and for presenters to enter and leave the stage.
- **Inform all presenters:** Let presenters know that their time allotment is precise and no overruns are permitted.
- **Confirm all presenters:** Call all presenters on the agenda the previous day to confirm their attendance and the address of and directions to the venue.
- **Adhere to agenda:** If you chair a meeting, state at the beginning that you will be strictly adhering to the agenda times. If a speaker becomes long-winded, interrupt and firmly state that there is a set agenda. Suggest that the discussion continue after the meeting or be tabled.
- **Plan for breaks:** At conferences, allow plenty of time for room changes, washroom breaks, coffee line-ups, stragglers and networking.
- **Pre-select an audience member** to signal presenters for the last five minutes, two minutes and one minute. Using the green, amber and red card system works for some.

REAL LIFE: TERRIBLE TIMING

Janice was thrilled to be asked by her association to plan a morning business conference. Eager to get as much content into the few hours as possible, she planned three speakers during the breakfast, a short break and then two workshops before lunch. She had never planned an event before and didn't get any advice on how to go about it.

The first speaker started late and ran overtime by 20 minutes. The next keynote speaker realized the problem and offered to cut her keynote short to catch up some time. The third speaker also went overtime. The participants then needed to go to the wash-room and change rooms, so the next round of workshops, which were in four different rooms, started late.

The presenters had to cut their one-hour workshops down to 40 minutes, which annoyed both the presenters and the participants. Some of the presenters didn't finish on time, so by the time the participants changed rooms and the second round of workshops started, they too had to be shortened to finish by noon.

The terrible timing created many negative comments and feelings. Workshop presenters were upset at the shortened presentation time and participants expressed their resentment at being rushed and not getting the content they wanted. The overall evaluations for the morning were not good.

The negative outcome could have been eliminated by careful timing of the agenda and by Janice speaking to all the presenters beforehand to stress the importance of keeping to their allotted time. Having a prearranged signal to complete presentations would have helped too. The morning dampened the participants' enthusiasm to such a degree that when asked on the event evaluations whether they wanted this event next year, many answered no.

Many meetings and conferences suffer the same fate by being poorly planned. Astute time planning is crucial to a successful venture.

BIG IDEA: DON'T OVER-VOLUNTEER



Volunteers are what make our society such a wonderful place to live and work, however, over-committing to volunteering causes unnecessary stress. If you are asked to sit on a board of directors or to volunteer for an organization, tell them you will get back to them with an answer in a couple of days. Think about WIFY. Review your available time and commitments. If you have the time, can clearly see the personal or business benefits, and know you will do a good job, only then should you say yes.

ORGANIZE A MONTHLY ROUTINE

Business is cyclical so certain monthly tasks have to be completed. The more you work to a routine, the easier time management becomes. Once new habits are established, you will feel more in control and able to focus on growing your business. Figure 3.2 outlines some of the necessary monthly administrative functions, along with a suggested time frame.

Figure 3.2: MONTHLY ADMINISTRATIVE FUNCTIONS

Function	Suggested time frame	Benefit
Ordering supplies	Beginning of the month	Extends credit period by nearly 30 days
Billing customers	Beginning of new month	Increases cash flow
Collections	Once a week	Keeps cash flowing
Payroll reconciliation	By end of first week	Avoid overdue penalties, plan cash flow
Paying accounts	Twice a month	Avoid interest, plan cash flow
Provincial taxes	Beginning of new month	Plan cash flow
GST remittance	Beginning of new month	Plan cash flow
Accounting	When bank statements arrive	Monitor progress immediately
Review financial situation	When accounting completed	Tax and future planning, catch errors
Marketing and follow-up	Each morning	Generate income
Staff meetings	Once a week, Mondays	Start week positively as a team

ORGANIZE THE HOME OFFICE

No doubt the thought of operating from a home office initially sounded like the best idea since cyberspace, but as many have experienced, it's not really that glamorous. Once again the Eight Essential Entrepreneurial Skills from Chapter 1 must be harnessed to make a home office a practical place to do business.

Countless problems that you hadn't thought of surface, often presenting very irritating situations. Let's look at some of the common problems that home operators experience, along with some suggestions to keep you better organized and motivated.

Family frustrations

Train your family to leave you alone during working hours. This takes time and patience, so you must take your business seriously or your family won't. Explain that it is a great benefit to have you at home, however, you are unavailable—excluding emergencies—during working hours when the door is closed and the “do not disturb” sign is showing.

Children usually adapt to these rules and understand them quite well after they are aged seven. Make time in the afternoon when they come home from school to have a “coffee break” with them. A little quality time is important to both you and your children to maintain a balance.

Stress to your partner or spouse the importance of having uninterrupted quality work time. If you say you'll finish at 5:00, avoid making exceptions so that the family doesn't resent the business. There is always the evening to complete any urgent work.

Grappling with growth

Many businesses start in a small office, only to find that they need more room. Look in furniture catalogues to see how you can utilize floor-to-ceiling storage shelves, computer and desk organizers, bookshelves and filing cabinets. Throw away “stuff” and keep the office basic and efficient. If the situation becomes unbearable, prepare some projections of the required sales volume in order to profitably move to commercial premises, and make this your goal.

BIG IDEA: SEEK ALTERNATIVE SPACE



It's a common dilemma for your business to be too small to move to commercial premises, yet the residence has run out of room. If local bylaws permit, you may be able to utilize accessory buildings or build an addition. Another option is to rent a mini-storage warehouse or a small workshop. My son exchanges shop rent for use of his tools, paying only for a portion of hydro and hence keeping the overhead to a minimum.

Dealing with other diversions

If a neighbour calls, comment that you would love to chat and will return their call after five. Stress that you have work to finish. Don't fall into the trap of "taking a break" with your neighbour. You wouldn't do it if you were working for someone else, so don't do it now.

It's difficult to work during fine weather. You can hear the neighbour's lawn mower or chainsaw and would dearly like to be out there with them. Make it a goal to achieve certain priorities, and when that work is completed, turn on the voice mail and go out to play. You will achieve far more when you return feeling refreshed and energized. There have to be some benefits to being home-based, but don't play at the expense of letting your customers down.

BIG IDEA: PLAY A LITTLE



Considering that the fine weather season is relatively short in Canada and parts of the northern States, it's not such a bad idea to play a little. You need your rewards, and often, home-based self-employed people don't take enough relaxation time.

Sharing with shift workers

There couldn't be a worse combination than trying to operate a home-based business and living with a shift worker. The two are not compatible if you entertain clients or work with noise-generating devices, particularly telephones. You and your spouse will have to work together to meet each other's needs. You shouldn't have to downsize your business operation because of this, but finding workable solutions takes time (earplugs work). Telephone and fax ringers have to be turned down, and you may have to visit clients instead of them coming to you.

Overcoming geographic isolation

On my speaking tours to remote locations, I have been impressed by many entrepreneurs who manage under adverse circumstances. One couple living in a remote interior area operate two craft businesses. They face the challenges of generator-powered electricity, a radiophone and no direct Internet access. Their property is a two-hour drive from the nearest town on a route of potholes surrounded by road.

Yet they have overcome these challenges by utilizing a local answering service, checking messages daily and by having a local company hosting their Web site. They keep in touch with the business world by subscribing to trade magazines and regularly attending seminars, conferences and trade shows to maintain their presence and networking contacts. There is always a way if you are determined to succeed.

TEN TIPS TO KEEP YOUR DAY ORGANIZED

1. For home office operators, start each day at a regular time as though you were preparing to leave for work. Dress neatly and forget working in your robe or pyjamas—you cannot function in work mode sporting slippers, stubble and sloppy clothes.
2. Quickly tidy the house first thing in the morning or in the evening. If your home is untidy, you won't work efficiently. Don't even think about performing household chores during a working day. They are not a priority.
3. At the end of each day, clean off your desk and make a list of things to do tomorrow in order of priority. If you start the day with messy desk

syndrome, you will not function at peak performance. As you work, keep your desk organized.

4. Return e-mails requiring an answer within 24 hours or you'll forget. You can do this in your pyjamas in the evening or when you are preparing your list of things to do.
5. Review your follow-up file daily and make any phone calls after 9:30 a.m. Allow people time to settle in at work. Avoid follow-up after 3:00 p.m. when sugar and concentration levels are low. Forget follow-up on voice-mail Friday—most people are in TGIF mode and are not receptive or not there.
6. Keep your priority list close to you on your desk. Or use sticky notes, transferring the information to your list once or twice a day.
7. Open mail and attend to it immediately to stop a pile-up of papers. Note important account payment dates, check accounts and file them to be paid. File or attend to other correspondence. If you can't attend to something immediately, note it on your priority list and place it in your in-box. Review your in-box once a day.
8. Write up the bank deposit and attend to payment discrepancies. Review your planner and accounts to be paid file.
9. Work to a structured routine. Stop for lunch, catch up on the news and finish at the same designated time each day. Take a short walk to recharge the batteries. Spend quality time with your family and return to the office in the evening if necessary.
10. Refer to Chapter 4 under "What Are Source Documents?" to learn how to organize your accounting information.

PLAN TO STAY ORGANIZED: A CHECKLIST

This chapter has discussed many areas of your business requiring astute organization. You may already be a well-organized person in control of all facets of the operation. If you are, then feel proud of yourself and keep up the good work. If you need some organizational help, complete Figure 3.3, a checklist that will guide you through the process. If you can already check off over 20 "completed" boxes, treat yourself to lunch.

Now you're in control

Once you are physically and mentally organized, you will feel better able to control both your business and your personal life. The next step is to gain control of the financial aspect of your business. You can't do one without the other, so Chapter 4 will show you how.

Figure 3.3: OPERATION "GET ORGANIZED" CHECKLIST

Area to organize	Needs work	Already organized	Completed
1. Use a weekly time map to plan time	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2. Plan time for the Five Fs	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3. Plan regular, specific fitness time	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4. Start a priority list system	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
5. Purchase equipment for filing system	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
6. Clean out old files	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
7. Organize all business files	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
8. Install a back-up system	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
9. Change back-up timer to two minutes	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
10. Know how to defragment hard drive	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
11. Install anti-virus program	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
12. Update virus protection weekly	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
13. Install contact management program	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
14. Organize e-mail and folders	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
15. Organize a telephone call system	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
16. Review availability for volunteering	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
17. Qualify lunch and coffee appointments	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
18. Clean desk each morning or evening	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
19. Attend to banking and mail daily	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
20. Develop a structured daily routine	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
21. Use a daily planner	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
22. Use a monthly administrative routine	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
23. Delegate time-consuming chores	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
24. Do follow-up calls each day	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
25. Monitor business monthly	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>