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The Path to Organization

- “My office is a disaster area. I can’t find anything.”
- “I’m always late for meetings and appointments.”
- “I can’t seem to meet my deadlines.”
- “My disorganization is driving me crazy.”

Sound familiar? You’re not alone.

Four coaching clients made these comments recently. Each expressed the frustration and stress they felt as a direct result of their disorganization. And each agreed, “Something has to change.”

It’s not surprising. A lot is expected of today’s leaders. Increasing demands on our time and resources require a new way of operating. The chaos we create for ourselves is more stressful than productive. Our disorganization wreaks havoc on our lives and the lives of our coworkers, family and friends.

But there *is* hope. You do not have to accept disorganization as a way of life. However, just like any valuable endeavor requiring change, moving from disorganization to organization requires us to shift how we think, feel and act.

When you think of being “organized,” what comes to mind? According to Marilyn Paul, author of the book, ***“It’s Hard to Make a Difference When You Can’t Find Your Keys”*** being organized means you can:

- find what you want when you need it.
- keep track of important information and lay your hands on it when you want to.
- complete your tasks in a timely way.
- arrive at your destination when you choose.
- keep agreements and make agreements that you can keep.
- take action when you want and seize new opportunities as they arise.
- focus on what is important to you.
- do all of this with a great degree of presence of mind. You are able to pay attention to what you decide is important.

Sounds great doesn’t it?



How Can I Get There?

“How can I get there?” That’s what each of my clients asked. For those of you who have tried unsuccessfully the “only handle it once” technique or similar **tactical** approaches to organization, it’s time to think about becoming organized in a new way. My clients came to learn that getting organized required them to understand how their thoughts, behaviors and beliefs were *negatively* impacting their desire:

- to live with **confidence**, knowing they could find something when they needed it
- to live with **reliability**, knowing they would show up when they said they would
- to live with **responsibility**, in meeting their deadlines
- to live with the **calm** of knowing that they could count on themselves

The Seven Step Change Cycle

In her book, Paul describes a cycle for change applied specifically to creating a path for organization. Thus, Paul’s cycle is an excellent tool that I integrate with one-on-one coaching in helping my clients conquer their organization challenge. Her approach is an extremely useful framework for focused change in behaviors, thoughts and beliefs.

The steps in the cycle along with some of the representative questions are below:

Step 1 ~ Establish Your Purpose

Why do you want to get organized?

What is your disorganization costing you?

What will you gain from creating new, organized behaviors that you want?

Step 2~ Create your Vision

How would I like my home or work space to be?

How will I feel when I arrive to my meeting on time?

How will I feel when I do what I say I will do?

Step 3~ Take Stock of your Current Reality

How do I organize myself now?

What choices am I currently making?

What areas of disorganization (i.e. clutter, timeliness, etc.) are causing the most challenge?



In Step 3, Paul encourages you to look at your current reality of organization on four levels:

Physical: what you do day-to-day, the actions you take that produce the chaos

Emotional: your feelings about disorder, order, timeliness and possessions

Intellectual: what you think, how you think and what you believe

Spiritual: your deeper sense of meaning and purpose

Step 4~ Choose Support

What kind of support do I need?

Who can help me stay the course in this valuable change effort?

Step 5~ Draw on Organizing Wisdom

This step is where the practical solutions come in. When we integrate the tactical organizing process with the deeper changes in beliefs, habits and behaviors, success is possible.

Step 6~Take Effective Action

How will I overcome my blocks to change?

What specific steps will I take?

Step 7~Go Deeper to Keep Going

How can I sustain these changes?

How can I stay motivated to learn and grow through the change process?

By combining this Seven Step Change Cycle with my Retained Learnings™ Coaching Program, my clients have experienced success as they work through the process with my support as their coach and change agent.

The Seven Steps in Action

“John,” a Partner at a CPA firm, came to me for coaching in utter frustration. He had a very busy tax practice and his disorganization was undermining his ability to complete his projects on time and under budget for his clients. Piles of files lined his floor, making his office look more like a landfill than a place of work. So it was not surprising that he could not find what he was looking for. “Something had to change,” he said.



We worked through the Seven Steps above. His purpose for organizing was very clear. His disorganization was affecting his performance in the firm, limiting his overall effectiveness as well as his compensation. He knew his vision was an office environment where he could reliably put his hands on important files when he needed them and the confidence to complete his projects on time and under budget. He wanted to create a space that gave him more peace of mind and a clear head to think through the problem solving his role as a tax leader required.

That brought us to Step 3, understanding John's current reality. I had John complete an organization self-assessment survey, helping him identify his organization areas for focus. In addition, he completed the Myers Briggs Personality Type Indicator (MBTI) as well as an emotional intelligence assessment (EQi) to learn how his personality and EQ inform his organizational challenges.

In Step 4, John identified his support system. In addition to our work together, John met with his assistant, asking for her specific support to get his office in order and help him keep it that way. She wholeheartedly agreed, knowing that she had been very frustrated in attempting to do her job in such chaos.

In Step 5, John and his assistant designed new and better processes that fit with his personality and work style preferences. In her book, Paul identifies several strategies and approaches to develop new habits that John incorporated into his daily routine. Steps 6 and 7 required John, through the coaching process, to identify possible barriers to his success and propose solutions for overcoming those barriers.

As John worked through the cycle, building new and more productive habits and behaviors, his confidence grew. He noticed he was more focused and energized. He procrastinated less and delivered his services in a more timely way. His colleagues were impressed and told him so.

The Bottom Line

When you challenge your underlying thinking, feelings and beliefs and begin practicing new behaviors, fundamental change can occur. Using the Seven Step Path to Organization as outlined by Marilyn Paul provides a new opportunity to restore or begin a life of order and control.

About the Author: *Mary C. Werner, CPA, MOD is the founder of Werner Coaching and Consulting, Inc., a practice that builds on her more than 25 years of accounting, business and financial consulting experience. A leader of leaders, Mary is especially skilled at coaching and consulting with CPAs, attorneys and other business professionals who are interested in accelerating their personal and professional growth for breakthrough results. For more information, visit www.wernercoaching.com or contact Mary at Mary@wernercoaching.com.*