

Chapter 21

Fast and Easy Organizing

■■■ Help! How can I possibly get everything done that I need to? Use the **80/20 rule** and start making more money!

Help! How can I possibly get everything done that I need to? That's a question I often hear in my coaching practice and one I readily admit was a problem for me. **Then I got smart, got help and started following the 80/20 Rule. And you know what? I started making more money.**

Use the 80/20 Rule

What is the 80/20 Rule? Briefly, it applies to all aspects of your business and your life. **It states that 80 % of your effectiveness will come from concentrating on 20% of your goals.** The trick is to figure out the important 20% that you need to concentrate on.

When you're running your own business it's easy to get caught up in mundane tasks that drain your time and energy, but don't bring in any money. Spending long periods of time reading email every day is a common trap we all fall into. (And it's definitely *not* in that all-important 20%.) So think of ways to delegate this task or spend only a limited amount of time answering critical emails that arrive in your mailbox.

The easiest way I've found to put the 80/20 Rule into action, is to figure out what is most important in my business and to organize my everyday to-do list according to those activities that bring in the most profit quickly. Check out the Insider Information below for an even more powerful way to boost business and see quick results from the 80/20 Rule.

INSIDER Information

What are your top three MONEY MAKERS?

Here's a good rule of thumb - pick the top three moneymakers to work on every day and do them first. **For me, the biggest moneymakers include: invoicing my customers, following up on open orders and connecting with new prospects and current customers. Those are the three things that will make the most money for me.**

What are your top three MONEY MAKERS? Once you start concentrating on your top three priorities, you'll see a big difference in how much you accomplish every day. And as an added benefit, you'll feel less stress. Working more efficiently can translate into more money, and by improving your focus and seeing results, you'll enjoy your work more!

Organize your samples and catalogs

You don't have to be in the promotional products business very long to be overwhelmed with samples and catalogs. **I've found the more organized I am, the more money I can make.** I keep small samples in shoeboxes organized by supplier name, and larger samples hanging on a pegboard that takes up a full wall in my basement. At the end of the year I donate the majority of my samples to a local charity.

For convenience, I keep the catalogs of my **preferred suppliers in a separate location**, close to my computer and telephone. These days I don't worry too much about having every catalog available, since **most suppliers' catalogs are available online.**

Useful ways to file

Look in the upper or lower corners of the catalogs for these numbers or words:

- ▶ **File by category:** apparel, pens, coffee mugs, etc.
- ▶ **File by ASI® number:** most catalogs list this number
- ▶ **File by UPIC (Universal Promotional Identification Code) word:** most catalogs list this word

More tips for creating organized files

- **Idea File:** I put my customer's name on the file and organize ideas for them in the file.
- **Price Quote File:** I file these by customer name and also keep a record in my computer software.
- **Orders In Progress File:** I file these by customer name and purchase order number before the order is shipped.
- **Billed Orders:** I file these in a separate drawer.
- **Paid Orders:** I file these by company name and include a copy of the artwork with the order.

Streamline your business with SYSTEMS

What's a system? It's an organized way of doing something that creates a desired result. For example, I have an **order follow-up system** that saves me time and money by eliminating mistakes and miscommunication. I've broken the process into easy to follow steps so I always know what to do when.

Order Tracking and Follow-up System:

- Call the supplier to make sure the order has been received.
- Verify imprint, color specifications, shipping, pricing and deadline date.
- Verify payment terms.
- Follow up at least once every week before the order is scheduled to ship, to make sure it is on track.
- Call the day before the order ships to check again.
- Call the day the order ships to get tracking information.
- Call the customer the day it is set to arrive, to make sure it has been received and everything is ok.
- Send a handwritten thank you note to the customer.

A worthwhile investment

Developing easy **step-by-step systems** like this for all aspects of your business will reduce the headaches that can come with tracking large numbers of orders at different stages of completion. Yes, the systems take time to develop and implement, but in the

long run they will free you to spend more time in front of prospects and customers. (Which is where you belong!) By doing this work up front, you'll also have the added benefit of developing a blueprint that anyone in your office can follow.

Technology has leveled the playing field and made it possible for small operations to compete with industry giants. Regardless of the size of your business, you can create systems and automate procedures to save you time and money.

► *What Can You Do Now?* ◄

Develop your own systems and business forms. Here are suggestions that will save you time and money.

- Develop your own order tracking and follow up system or use the one in this Manual.
- Prepare a company brochure or one sheet that describes your services.
- Have ideas for different types of promotions: trade shows, safety programs, special events.
- Have a briefcase packed with your favorite catalogs and some promotional items so you can respond quickly.