

Clean Sweep Checklist

Date: _____



Clutter, procrastination, unfinished projects, poorly organized work flow systems and an outright overflow of paper are some of the common tolerations most financial advisors share. Creating a clean, organized work space is the point of the Clean Sweep Week. The following checklist should merely serve as a starting point for simplifying and improving your daily work environment.

- 1) _____ De-clutter your desk and credenza. Start with the top of your desk. Then move to each drawer and even through the old file folders.
- 2) _____ Set a goal to reduce the physical amount of paper in your office by 50%. If a file or a piece of paper is not absolutely necessary for helping you reach your goals – give yourself the freedom to throw it away.
- 3) _____ Make a decision during this Clean Sweep Week to touch each piece of paper only once. Do not leave an unfinished task unfinished, choose to tend to it, delegate it, trash it or place it in a time slot on your Outlook calendar when you will complete the task.
- 4) _____ Clean up and tend to your email folders—inbox, sent and deleted folders.
- 5) _____ Call your computer support hotline and fix any nagging computer issues that have not been fully resolved.
- 6) _____ Make sure your written correspondence is up-to-date. Have you written all of the letters or thank you notes you need to write? Make a list and set a specific time on your Outlook calendar to finish these tasks.
- 7) _____ Throw away all old training materials and binders that are no longer relevant to helping you grow your business.
- 8) _____ Get rid of everything that does not work. Throw away or destroy old laptops, pens, and any other machines that are out of date or broken.
- 9) _____ Put together a box of useful items that you sometimes need at the office and never have available. BandAids,[®] antibiotic ointment, comb/brush, deodorant, lotion, nails, hammer, screw driver, etc. Place them all in one location.
- 10) _____ Once the clutter has been removed, take the time to deep clean your entire office, dust the furniture, plants, picture frames - wipe out the inside of the drawers, vacuum under your desk, wipe down the baseboards, replace any burned out light bulbs, dust the bottom of your office furniture, Windex[®] the windows.

The key will be to set a regular time on your Outlook calendar to spend one hour per week staying organizing and keeping your work space clean.