



Doers Shakers Makers with Sierra Bailey

Episode: Corraling Chaos

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[00:07] Do you feel scattered like your to do lists, spreadsheets, and files are dominating your life and work? Well, today we'll talk about some ways to corral the chaos and help you have systems to manage your scattered productivity and all of your work trackers. My name is Sierra Bailey. Welcome to Doers Shakers Makers, a podcast for go getters to inspire you in your business and life. All right. If you have some sense of a little bit of organization, shall we say. Let's say you have a planner and you have some to do lists. Maybe you are one of those wonderful people who enjoy spreadsheets and have them created for your business or your life. You track things, you're kind of on top of it, but managing all of these things is starting to really become a pain in the butt and you are losing the battle.

[00:57] I actually had this asked in the Facebook group, ps, did you know that there was a Doers Shakers Makers Facebook group? It's in the show notes if you'd like to join. And I had that brought up by Marla who asked if some way to corral everything. She's feeling overwhelmed, she's feeling like things are all over the place, what can she do? So I suggested we have coffee, but if you are not in the position to be able to jump on a call with me, let's talk about some simple and easy things that you can do that can help this a little bit. It's kind of interesting because I think a lot of small business owners end up purchasing project management software thinking that it will help with this, because this is a common problem in not only small business owners but just people at work and anybody that has a busy household or anything. You get to a certain point where you're organizing needs organizing basically.

[01:51] So there are a few ways that you can do this. Let's define first of all what all these things are. All right. So, I'll use myself as an example as I tend to do because I know myself the best. I have todoist, which is an online cloud-based to-do software app, whatever you call it nowadays, on my phone and my computer. I have it organized in the getting things done method. So, I have projects, it's probably more chaotic than it need be. I sometimes lose track of things so that is definitely not something that can work for everything with me. I use that for my tasks, my day to day tasks. What I did realize was that in doing that, because everything's kind of tucked into little folders and things like that and I have used, I used something called things in the past which also had a similar problem with me.

[02:39] So I finally had to admit that I need to have a paper planner version of the goal setting and the more big picture ideas. And for a while I went full paper with everything again. But no, I need to have reoccurring scheduling capabilities of a todoist, like an online app and I need to be able to like open up two pages and look at the big picture. So already I'm getting a little confusing. Then I have Google calendar which I love and then I use Calendly that basically I can send people my link to schedule a coffee or to actually schedule client time and it bills clients right through there so they pay for a session prior to us communicating. That's great. It links with my Google, but again there's a lot of balls in the air already. Then I add to that all the correspondence at this point it is, and I dealt with this when I had the jewelry company too.

[03:35] There's no avoiding it. You just have to deal with it. You have your emails coming in. You have Facebook messages coming in probably in your personal and your business and any groups that you're a part of. You have LinkedIn direct messages; you have Instagram direct messages. I have not yet figured out a way to access like Instagram direct messages. I will say that I'm really in all of this. Also, social media in general is kind of added to it and I am now, because I do social media for multiple boards and committees that I'm on, I am now looking at using Hootsuite for that. So, there's another thing to add to the list. And then I am a lover of spreadsheets. I actually hand write them. Sometimes I use one for the nonfiction books that I'm reading to make sure that I'm reading for all of the book club deadlines that I'm part of.

[04:22] And then there's a whole variety of them on my computer, half of which I forget to look at. All right. So how do you manage all of that? How do I manage all of that? I mean quite honestly, half the time I don't. So, let's not think that anybody is fantastic at that. I feel like a lot of it is a mindset shift. Really start thinking in your head like this is part of, you know, time management, productivity being organized, goal setting, whatever. This is just another component in it. The mindset of it is hard work and there's no easy way to manage it all. There's no, I have yet to find some magic button way of doing it and I look for it a lot, so I think that before you even get started, you have to have a little bit of a mindset shift.

[05:01] You have to say to yourself; it's going to take a little bit of work. I'm going to have to make sure that I am, I'll get to this in a little bit, taking the time to keep track of everything. Now I know a lot of people use Evernote for this exact purpose and it works for them, but to me, Evernote is just a little bit broader of my todoist that I'm using and they both, you can pull files and emails and all of that into it. That doesn't work that way for me. It might for you. So if you've never used Evernote, give that a try because that may be the perfect thing that you need to work with the way your brain works, you can set it up the way you want. I'm a big tinkerer with technology, so I get really kind of lost in those details sometimes.

[05:39] Evernote works very well for a lot of people and it does solve a lot of this problem, but to me it's just adding another thing on there that I'm not going to look at necessarily. All right so let's continue on

with those of us. Now maybe some of you, hey, problem solved, Evernote, bye, okay! Listen to the rest, it will help you. Now another way is you really could create like a simple folder system on your computer a little bit more and you could put a little more thought into that and say anything from defining the projects to having a hierarchy and say start here now, here, now here and actually having a way that you bring yourself through your tracking methods. Let's say you have a whole bunch of spreadsheets that you have files and you have things like that so you could have it set up and this could then link to it todoist or Evernote.

[06:23] Here's the thing about systems. Systems are fantastic, but there are, it's like being organized in your kitchen. You have to, one, find a system that works for you and sometimes you have to be bouncing around with systems. Like, I mentioned, the planner thing, todoist, I bounce around a lot and keep trying things. Sometimes things stop working depending on what kind of projects I'm working on, so just as I always say to be really organized you have to constantly be organizing in your physical spaces. It's the same for something like this so you really just have to be on top of it and put a little bit of time in it. Another way we have, we've talked about Evernote, we've talked about using a folder system in your computer, linking that with like a todoist or something. Another thing to think about is if you are a paper person, is having an actual master list in one of these methods.

[07:13] The reason why I love todoist, as I mentioned earlier is to schedule the reoccurring tasks and to have auto things set up. I'm a big fan of auto things. I use it with bank accounts. I use it with emails. I like to set up auto things. So, if you have, let's say all of these, you know, spreadsheets, I forgot to mention, I also have multiple paper files. I have them on my desk for different projects I'm working on. I have my client ones to the side of my desk. You know that all has to be brought about. So, if you have a section in something like that todoist, any reoccurring scheduling app works, that actually says like every Friday at 2:00 PM review all your things or you know, every single morning...problem is following these. You know, I love putting the auto things up, I also have things like, you go to the gym every day that does not necessarily get done.

[08:04] Oh you guys, speaking of systems, I'm so out of a system on that. I changed gyms and I cannot get into a system for that. It's driving me crazy. But anyway, I digress. Sometimes it takes a little work to figure out your new system. No matter what it is. I like to put things in my todoist that pop up. So, when I'm looking at my to do for the day, you can actually say things like check the, okay, let me give some real-life examples so it makes more sense. I have a, and don't ask me why I created some spreadsheets in excel and some in Google, I don't know, but I have one in Google because it's actually a tab when I'm going through and checking all of the things. So, I kind of was creating a system unconsciously. So, if tabs, when I'm in Google chrome, have Facebook and Mail Chimp and Blubrry, which is where I track my podcast statistics and all of that kind of thing.

[08:52] So like all of my stats are there. So, in the section of those I also have a spreadsheet of who I like to stay in touch with and how often I like to be in touch with them. Yes, this includes my siblings because

otherwise it wouldn't happen. I should probably put some more family members in that list and I actually keep track of when I see them, and I keep track of when I should see them next. And I review this at the end of every month to make sure that I have put everybody in that I saw. If I make new acquaintances that I want to make sure they go into this. Usually like friends of mine, we try to see each other quarterly. It gets a little chaotic more than that. But some, I do see more so they're in a little section. I'm a pretty naturally organized person so I don't want to intimidate you with the level that I tend to gravitate to.

[09:37] The point of this is that I actually have something that shows up in my todoist, that says to check this list every month at the, you know, and I have a designated day that I check it. So, I don't even have to think about it. Just that pops up and I'm like, oh right! I need to make sure that I've put people in that and that I am checking it and then I am noting the people in the next few weeks who I need to reach out to an email so that I can stay in touch with them. So, a lot of like creating a way to do all of this is more work. But again, like I talk about with a lot of things, you're front loading it. Any System, I say this, and clients look at me sometimes or I can hear them looking at me through the phone when they're like, wait, what do you want me to do?

[10:15] And I'm like, I promise you once you set it up and get it going, yes it is such a pain in the butt the first time that you have to set it up and to get it all going. But if you're starting something that will continue and reoccur, you're just paying for it upfront and then as you continue on, it makes your life easier with minimal effort. So, remember that whenever you're putting a new system into play. All right, now you're getting the idea about how perhaps to organize. You're, maybe getting an idea about how to remind yourself to organize. Even using the Google reminders can work. Some people used todoist to actually put it in their Google calendar. I am not one of those people. I don't like to schedule my tasks. I'm more scheduled a work block and then it depends kind of on the tasks that I need to do.

[11:00] I will also say I talk about todoist a lot. If you do decide to use it, I use the paid version because you can get in there and you can change things a little bit more. And I'm not sure, I think in the free version you can do this, but you can actually set your priorities and you can give things. There are three different colors so you can have your A, B and C of your priorities, which I believe I talked about in Goal Planning. I'm not sure about that. But I have talked about it. So, once you get all of that set up, I've, I keep alluding to this, but you are going to have to accept the fact that you have to stay on top of these things. So just setting it up, just knowing that you have a method, that is not solving the problem.

[11:40] What is actually solving the problem, is you intentionally staying on top of these tasks. That's so much of what time management and productivity is. It's the habit of doing the action. It's not just the like setting up a system and set it and forget it. There's no forgetting here. It's setting up a system and then staying on top of it and having it at the top of your mind. You know, it's like with goals, writing it down seems to increase the percentage that goals come to fruition for people so greatly, it's shocking. And yet the percentage of people that actually write down their goals so tiny, that it's also shocking. So

much of a productivity is just actually committing to doing it. And that's a lot of this, a lot of this is that. And in the Facebook group, I'm trying to work on that with everybody and to help be a little more guiding with this because I think it's a benefit of being in like a group together and the accountability.

[12:37] But you really need to take some time each week to spend on your goals, to spend on planning out your week and to spend on making sure that all of your systems are working. So, if you own a small business, and I'm talking the tiny, very small businesses as I talked about in the scaling episode, most businesses are one person in the United States. If you are one of those people, I am sure you can use VA's and you can use contract people and you can use people that are helping you. But you're wearing all the hats and in order to make sure that your business is functioning as a well-oiled machine, you need to make sure that everything is in good shape. You know, it's like getting your car checked up, but a little more often. So, I'm such a big fan of taking some time each week to spend on checking these systems and to make sure that everything is going the way that it should be.

[13:29] Scheduling a little bit of time to check on these systems will greatly help. So even if you don't have a master list or you're not having something where they all come together, I mean a master list could be taking a piece of paper, just writing down for a while until you make it a habit where all of your trackers are. And then just taking that time every week to sit down and say, all right, for the next hour I'm going to sit here and I'm going to check all of my things and make sure they got filled out for the week. I know I'm not a big fan of like forcing you to do it daily because I think that that often just too many things come up in the habit, gets a little pushed. I do recommend that you take a few minutes at the end of the day just to kind of prepare for the day. You know, get those three things ready and all, but if you are taking a little bit of time each week and making sure that all of your systems are getting filled out and that you have your spreadsheet's up to date and that you're checking all the things, it will greatly improve the feeling of being scattered.

[14:24] Those check ins are really what the secret is and in the grand scheme of things take less time than anything else that you could possibly be doing. Just taking a few minutes to be like, all right, did I fill out this thing? You know, like for example, did I fill in the people that I had coffee with? Did I make a list of the people that I want to have coffee with? Did I make sure that all of my clients got their follow-up emails and their, you know, well hopefully that would be a daily check in. Not a weekly check in, but you know, at the end of the day, like I said, little check-in and then at the end of the week, did I record all of the things that I needed to record? Did I fill out everything, have I checked everything, all of that. That is actually a secret to time management productivity that check-in.

[15:08] I hope that maybe you try to work that nothing else weekly check in into your schedule. I really like a good hour on Friday afternoons. It makes you feel good through the weekend, but I also am prone to working on the weekends. So sometimes I'm like, oh, is that part of last week or this week? I don't know. So sometimes a Sunday is great too and there's nothing wrong with Monday morning. Really. There's no time like the present. So, to take excellent action. Here's a suggestion for you. I'm going to be

done in a few seconds. As soon as I'm done, sit down and check in with all of your systems. There you go. You're on your way because you're taking action on it, and that is the most important thing that you can do. Oh, and join the Facebook group. It is Doers Shakers Makers, just like the podcast. I'll have it in the show notes but thank you for joining me today. My name is Sierra Bailey, and this is Doers Shakers Makers, a podcast for go getters. If you enjoy this podcast, please subscribe wherever you listen, and if you're listening with apple podcasts, rating and reviewing helps me get found. I'll be back next Monday to keep you inspired and to get you doing shaking and making.

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