

# Keep it Simple Sweetie - MK office organization

(Thank you Cristi Whelchel)

## Items to Purchase:

- 3 Large 2" Three-Ring Binders
- 12-Pack Magazine Sheet Protectors
- 8 ½ x 11 Tabbed Dividers
- 8 ½ x 11 January - December Tabbed Dividers
- 12-Pack 9x12 Manila Envelopes
- 5x9 A-Z and Jan-Dec Tabbed Dividers
- 5x7 Note Card Box (Or Wide Shoebox)
- A Portable Hanging File Box
- 17 Hanging Files (Or start with less and add as needed)
- 12-Pack 3x5 Note cards or Staple 12 ½-Sheets of paper together

## Steps to Setting up your office:

- 2" Binder or magazine holder – Label "Applause Magazine"**

Put 12 magazine sheet protectors inside your Applause Magazine in this binder after you are finished with it at the end of each month. This will serve as a reference throughout the year. This magazine is only available to you when you are active. Although the goal is to create a monthly ordering pattern you must order every 3 months in order to continue receiving this informative magazine.
- 2" Binder and/or Files in Computer – Label "Reference"**

This binder is for notes you will take in classes or training you will receive from your newsletter or email, etc. Place Tabbed Dividers in the Binder and Categorize notes by topics i.e.: Attitude, Image, Goal Setting, Booking, Coaching, Selling, Customer Service, Product Knowledge, Glamour, Closing/Objections, Time Mgmt, Money Mgmt, Team Building, Holiday, Promotions.
- 2" Binder – Label "Finance"**

Insert your letter size January through December Filler. This is where you will keep detailed packing slip that arrives with your product order each month. You can also keep your weekly accomplishment sheets filed monthly as well as you Money Management Worksheet.
- 12 Large Manila Envelopes**

Keep monthly expense receipts in one big envelope per month. Tally expenses at the end of the month and place totals on Monthly Financial Worksheet on the front of the envelope. Transfer quarterly/yearly to a Schedule C for taxes. These can be hole punched and stored in your Finance Binder as well.
- 5 X 7 box (or Shoe box) – Label "Customer Service & Follow-Up"**

Place A-Z Dividers in the box then Jan-Dec 5x7 Dividers. The A-Z Dividers will hold the top copy of the profile as well as sales slips from purchases she/he makes, and the Jan-Dec Dividers will hold the back/hard copy of the profile for Follow-up. For ex. You facial her on 11/2/03, you will place the hard copy of the profile behind the month divider that will be two months away (1/03). Remember to write in your calendar to follow up in two days then two weeks after her facial to check on everything she purchased. In the very front place 12 note cards with Jan-Dec (One on each card) for Client Birthdays. On the 25<sup>th</sup> of each month, send out postcards with 15% off Savings for Birthday month or have a Birthday Celebration for your Clients at your home once a month and tell her she can bring a friend!!!
- 17 Hanging Files in a Portable Office box (Or start with less & add as needed)**

This is to house your "Car Office" or you can keep it in your office and transport to your car as needed. Label the hanging files accordingly: To Do, To Book, To Deposit, To Collect, To Bag/Deliver, To Mail, Beauty Books, Look Books, Sales Slips, Customer Profiles, Hostess Packets/Literature, Recruiting Packets/Literature, Agreements, Preferred Customer Program, Scripts, Show Types/Procedures, Weekly Plan Sheets/Weekly Accomplishment Sheets (WPS/WAS), etc. as needed.
- A Flexible 1 or 1 ½" Binder – Label "Brain Book"**

This is to house Blank paper for notes (remember to write class notes on separate paper from announcements so you can file training notes in "reference binder" later), Weekly Plan Sheets, Daily Organizational Worksheets to Track Daily Activity and IPA's, Unit Promotion Flyers, Tracking sheets for your goals, Scripts, Steps to Success forms and Vouchers, A pocketed folder for "handouts," etc.