

NAPO2016

ATLANTA, GA • MAY 18-21, 2016



achievement



trends



leadership

Tuesday, May 17, 2016

Location

3:00 PM – 6:30 PM

Registration Open (Registration Booth)

Georgia Registration Booth

Wednesday, May 18, 2016

7:00 AM – 7:00 PM

Registration Open (Registration Booth)

Georgia Registration Booth

9:00 AM – 10:00 AM

Eco SIG Meeting

Open to attendees interested in more information

Georgia 13

9:30 AM – 11:30 AM

Angela F. Wallace Leadership Forum

Invitation only

Georgia 2-5

10:00 AM – 4:00 PM

Exhibitor Set-Up

Grand Ballroom

11:30 AM – 12:45 PM

Volunteer Leader Lunch

Invitation only

Georgia 10-12

1:00 PM – 2:30 PM

Chapter Leadership Forum

Invitation only

Georgia 2-5

Volunteer Leadership Forum

Invitation only

Georgia 7-9

Special Interest Group Leadership Meeting

Invitation only

Georgia 13

2:30 PM – 3:30 PM

Exhibitor Meeting

Athens

3:30 PM – 4:30 PM

First Timers' & New Member Orientation

International Attendee Orientation

Georgia

Augusta

5:00 PM – 8:00 PM

Expo Hall Grand Opening Reception

Open to all attendees

Grand Ballroom

Thursday, May 19, 2016

Location

7:00 AM – 6:00 PM

Registration Open (Registration Booth)

Georgia Registration Booth

7:00 AM – 9:00 AM

Expo Hall Open - Continental Breakfast

Grand Ballroom

7:00 AM – 8:00 AM

Holistic Organizers SIG Meeting
Open to attendees interested in more information.

Georgia 6

8:00 AM – 9:00 AM

Technology SIG Meeting
Open to attendees interested in more information.

Georgia 13

9:00 AM – 10:45 AM

Expo Hall Closed

Grand Ballroom

9:15 AM – 9:30 AM

Welcome Address

Capitol Ballroom

9:30 AM – 10:30 AM

Opening Keynote

Capitol Ballroom

Presenters: Scott Greenberg

10:45 AM - 12:15 PM - Concurrent Sessions

1-1 Content Marketing: Blogging Tips for Your Small Business

Georgia 10-12

Track: Trends/Tech/Social Media

Description:

Are you blogging for your organizing business? You should! If you want more leads, blogging can help showcase your expertise and grow your business. Professional Organizer and blogger, Deb Lee, CPO®, will share actionable tips, plugins, and resources to help you get started with blogging or enhance your current blog. All attendees will also receive a free Blog Post Template to make writing blog posts easier and faster. Attendees should have basic knowledge of Wordpress.

Objectives:

- Learn why you should blog for your business
- Define the basics of blogging
- Identify elements every blog post must have
- Discover essential blogging tools and resources every blogger needs

Determine why and how to promote your content

Presenters: Deborah Lee, CPO®

10:45 AM - 12:15 PM - Concurrent Sessions (Continued)**1-2 Moving Made Easy**

Georgia 7-9

Track: Special Interest Group**Description:**

Have you thought about adding "moving" to your list of services but you're not sure of everything it entails? Are you unsure how to answer questions such as: Where should we start? When should we start? How long is this going to take? How much is it going to cost? What should I do with all the stuff I want to sell? Then this is the session for you! There are many moving companies, what will set you apart from your competition? How do you help clients determine what is valuable enough to sell and what should be donated? We are going to cover all the steps involved in the moving process from how to bid a job to how to complete a job, and red flags you should look for. Let's have a conversation to make moving easy!

Objectives:

- Learn how to bid a moving job
- Learn the steps to complete a moving job
- Explore pitfalls to avoid
- Understand the value of certain items and what to do with them after a move is complete
- Learn all you need to know about boxes, wrapping, and how to safely pack a box

Presenters: Kristin Bertilson, ®**1-3 Imperfection Rules! Creative Ways To Run Your Business**

Georgia 2-5

Track: Business Growth/Marketing/Leadership**Description:**

The perfect space. The perfect client interaction. The perfect social media post. The perfect business...It's a lot to live up to. Instead, is it possible to trade in "perfect" for "better" — while providing even greater value to our clients? And can revealing more of our own unique and human qualities bring us more joy and success in our businesses? In this light-hearted, yet deep-digging session, we'll find out together.

Objectives:

- Create ways to infuse your individuality into your marketing and branding, and your direct work with clients
- Redefine for yourself what "having a successful business" means and looks like
- Challenge yourself to see if being an IMperfectionist is right for you

Presenters: Fay Wolf**1-4 Coaching Works: Where Coaching Meets The Organizing World**

Capitol Ballroom

Track: Business Growth/Marketing/Leadership**Description:**

Professional Organizers are more and more savvy every day -- as are their clients. Their issues are real and sometimes they go beyond hands-on organizing. This panel is designed to bring together a group of Organizer Coaches who have successfully blended coaching skills geared to a specific need for their organizing clients.

Objectives:

- Find out how coaching can impact your organizing business
- Learn the different ways that coaching can influence your clients and improve client outcomes
- Discover the wide range of applications of coaching in organizing
- Witness a variety of successful specialties that bring coaching into organizing

Presenters: Denslow Brown, CPO®, CPO-CD, MCC, Master Trainer (ICD),
Ellen Faye, CPO®, COC®, Mindy Fairbanks, CEG, Patty
Kreamer, CPO®, Susan Lieber, CPO®, COC®, ACC

10:45 AM - 12:15 PM - Concurrent Sessions (Continued)

1-5 Still Someone: Organizing Older Adults with Memory Loss

Atlanta Ballroom

Track: Specific Needs Clients

Description:

Control and dignity are complex issues for older adult clients, but for the client with memory loss, the need for control and dignity is greater. How do you maximize the individual's sense of control, as well as their dignity? This session describes a platform for understanding the impact of aging on memory, and provides concrete skills organizers can use to increase success with elderly clients, while maximizing the client's dignity and sense of control.

Objectives:

- Understand that working with older adults includes working with individuals with memory loss, and that this requires a special skill set
- Learn how emotions, grief, fatigue, medications and other factors impact memory
- Explore the difference between memory loss and dementia
- Understand the goals of communication are to maximize independence and self esteem
- Discover techniques and best practices for communicating with people who have memory loss

Presenters: Margit Novack, SMM-C

10:45 AM – 2:15 PM

Expo Hall Open

Grand Ballroom

12:15 PM – 1:15 PM

Education Committee Meeting (**Committee Members Only**)

Georgia 6

Lunch served in Expo Hall

Grand Ballroom

Working with Seniors SIG Meeting

Georgia 13

Open to attendees interested in more information.

2:15 PM – 4:00 PM

Expo Hall Closed

Grand Ballroom

2:30 PM – 4:00 PM

Annual Member Meeting & Awards

Capitol Ballroom

Open to all attendees

4:00 PM – 7:00 PM

Expo Hall Reception

Grand Ballroom

4:15 PM – 5:15 PM

Ambassador Committee Meeting (**Committee Members Only**)

Georgia 6

7:00 PM

Expo Hall Closes Permanently

Grand Ballroom

7:00 PM – 9:00 PM

Virtual Chapter Meet up (**Virtual Chapter Members Only**)

Georgia 13

Friday, May 20, 2016

Location

6:30 AM – 7:55 AM

Breakfast on your own

7:00 AM – 7:00 PM

Registration Open

Georgia Registration
Booth

8:00 AM - 9:30 AM – Tools for Organizers

HomeZada: "Providing Clients the Value of Digital Home Management"

Georgia 2-5

Description:

Learn how to help clients digitally organized one of their largest assets, their home. Managing the items in the home, as well as, the structure itself can be challenging. Help your clients understand and document what they own to help them provide visibility and knowledge about their possessions. And help them learn how to take care of their home to have a safe, efficient and healthy home. By helping your clients understand digital home management, they can access the information anywhere they need to view the information and have a central repository for all things home giving them the ability to manage the details about their home effectively.

Objectives:

- Identify services opportunities for your business
- Support your clients with data about their home in one place
- Help your clients become more aware of what they own and how to take care of it
- Help your clients become more organized and proactive in managing standard homeowner activities

Presenters: Elizabeth "Beth" Dodson

Fujitsu:Optimizing the Use of your ScanSnap Scanners

Georgia 7-9

Description:

Come learn how to optimize the use of your ScanSnap scanner to reach a new level of paperless organization. Learn about software solutions, cloud services, photo scanning, and other tips and tricks. You'll gain insight into what you should be asking your clients, as well as best practices on organizing your and your clients' documents. Attend a live, in-depth demo session with hands on training for all of the current ScanSnap models. Join us to gain the knowledge and confidence to add scanning services to your organizing business.

Objectives:

- Get informed on how to utilize all of the ScanSnap software and cloud services
- Discover best practices on organizing documents
- Discuss what important questions you should be asking your clients
- Learn how to best scan photos
- Receive hands on training for all current ScanSnap models

Presenters: Alexandria Rumpanos

NAPO - Information & Research Committee (IRC) - Trends Focus Group

Capitol Ballroom

Description:

A goal of the IRC is to monitor global trends that could have an impact to the manner in which NAPO Members serve their clients or even the type of clients they serve. Plan on joining this engaging trends small group discussion to contribute to the conversation.

Presenters: Nicole Chamblin MA, CPO® CPES® and Sue Pine, CAE

9:30 AM – 10:15 AM

Networking Break

10:15 AM - 11:45 AM - Concurrent Sessions**2-1 Closets, Pantries, Cabinets, Offices – Beyond the Basics**

Capitol Ballroom

Track: Organizing and/or Productivity**Description:**

Learn the tips and tricks of designing storage solutions. Provide unique solutions for challenging spaces whether it is a closet, pantry, kitchen cabinets or home office. This value added skill set should wow your clients and possibly generate more revenue for professional organizers.

Objectives:

- Know how to best utilize space in closets, pantries, kitchen cabinets & home offices
- Go beyond the basics and use creativity to design unique storage solutions
- Be able to educate clients and demonstrate the value of maximizing space and accessibility
- Learn how to increase revenue by providing design solutions

Presenters: Diane Albright, CPO®**2-2 How To Be An Independent Contractor**

Atlanta Ballroom

Track: Business Growth/Marketing/Leadership**Description:**

We hear a lot about growing our businesses by using independent contractors. But most of the discussion and support on this topic is for the hiring organizer. This session is designed to discuss this relationship from the contractor's perspective. We will discuss some reasons for being a contractor, how to build the relationships that lead to contractor jobs, and some challenges contractors may face.

Objectives:

- Identify reasons to be an independent contractor
- Understand how to build relationships with hiring organizers
- Discuss administrative and operational challenges contractors may face

Presenters: Katie Tracy**2-3 Power of Email Marketing for Today's Savvy Organizer**

Georgia 10-12

Track: Trends/Tech/Social Media**Description:**

The key to success in business is building relationships. Email keeps you in the front of clients' minds to drive repeat business and referrals. It is also a way to showcase your expertise as an organizer, share client testimonials and drive traffic to your website. Attend this presentation to take a deeper look into the importance and effectiveness of implementing email marketing along with social media as a tool that drives action.

Objectives:

- Identify if email marketing is right for your business
- Learn how to create engaging content that drives repeat business and referrals
- Discover how to marry email marketing with social media to get more bang!
- Review how to use reporting tools to engage with those who are engaging with you

Presenters: Toni R. Harris

Friday, May 20, 2016 (Continued)

Location

2-4 The Art of Tactical Time Management

Georgia 7-9

Track: Organizing and/or Productivity

Description:

In this session, you will be provided with a simple, flexible, and durable approach to time management that will allow you to better connect with your to-do list, goals, and priorities. The tactics shared in this session will help you deal with what you need to do, decide on what you ought to do, and ultimately do more of what you want to do in work and – more importantly – in life.

Objectives:

- Discover how to free your mind from storing so you can spend more time in deep and critical thought
- Use the clock and the calendar in a way that works for you both in the short and long term
- Craft your best days, weeks, months, and beyond with a proven approach that is simple, flexible, and durable
- Learn how to get important tasks done without feeling stressed over the urgent tasks on your to-do list

Presenters: Mike Vardy

2-5 ADHD in the Family: How to REALLY Help

Georgia 2-5

Track: Specific Needs Clients

Description:

A whole new approach to organizing people with ADHD! Borrowing from the world of ADHD Coaching, this session will teach professional organizers how to take a “coach-approach” to organizing that will enhance your work with ALL of your clients, especially those who have a hard time making new systems stick. It's not just about getting them organized, it's about helping them sustain a system that works over time.

Objectives:

- Identify specific ways in which organizing for an ADD/ADHD family is different from other families
- Debunk a number of common myths about dis-organization in an ADHD household
- Learn and practice tools for a "coach-approach" to organizing

Presenters: Diane Dempster, MHSA, CPC, PCC, Elaine Taylor-Klaus, CPCC, ACC

11:45 AM – 1:45 PM

Dine Around Atlanta

2:00 PM - 3:30 PM - Concurrent Sessions

3-1 Photo Organizing Anxiety and How to Overcome It

Georgia 7-9

Track: Organizing and/or Productivity

Description:

Through an engaging presentation, Cathi and Sherra will provide proven techniques that will alleviate a common fear, “how can I organize someone's photos, when my own photos are disorganized?” We will discuss printed and digital photo organizing including scanning, backup solutions and creating a digital file structure. With humor, we will demystify the Mac vs PC concerns. Lastly, each participant will leave with an action plan, glossary of terms and list of tools.

Objectives:

- Learn the skills needed to organize your own family photo collection (both printed & digital) which will result in decreased anxiety and build confidence in organizing and managing your clients' photos
- Understand the latest tools and guidelines for managing a client's digital photo collection including best practices for Mac and PC clients
- Recognize which parts of a project you can outsource to other professionals when necessary
- Identify the questions to ask so you can return to your existing clients and offer this as a new service and revenue stream
- Create an action plan including steps to reach new clients, services to offer and a list of resources to meet your goals

Presenters: Catherine Nelson, Sherra Humphreys

Friday, May 20, 2016 (Continued)

Location

3-2 The Paradox of Technology in Business (and Life)

Georgia 10-12

Track: Special Interest Group

Description:

Have you ever been in a client meeting and they choose to focus on incoming emails, texts, or IMs? Usually saying “Do you mind?” or “This will only take a second.” In business today, owners and managers are on call 24/7.

Technology is a double edge tool. In many instances technology tools save time and reduce redundancy. Other times technology becomes a time waster and time hog. Also, being connected 24/7 is unhealthy, unbalanced, and unproductive.

Objectives:

- Identify and assess technology costs and benefits: when technology is and isn't helpful
- Discuss and coach clients to properly define expectations: Reasonable response time to emails, texts, IMs
- Communicate, document, and educate expectations to customers and staff: revisiting traditional business hours
- Discover the health benefits of disconnecting

Presenters: Nadine Seidman Levy, MSW, MPA, Nancy Kruschke, CPO®

3-3 How Organizers Engage Students

Atlanta Ballroom

Track: Special Interest Group

Description:

The goal of this workshop is to assist organizers who work with or want to work with students.

Objectives:

- Gain a clear understanding of why students today need organizing help and how this organizing specialty is fast growing
- Learn about who is in the sphere of influence of today's student and why their role is important.
- Become familiar the various ways of engaging directly with students.
- Gain an in-depth knowledge of various persons and institutions that directly engage with students and how best to collaborate with them.
- Be introduced to various referral partners and learn how best to collaborate with them

Presenters: Katherine Jenkins, CPO®, CFMC, Ellen R. Delap, CPO®

3-4 Transparent Power: Improve Client Outcomes through Direct Communication (CPO ONLY)

Capitol Ballroom

Track: Organizing and/or Productivity

Description:

Enhance your clients' outcomes, improve sales, and ease “difficult” conversations with one powerful tool: transparency. Transferring skills and measuring progress become easier and obvious with processes so clear that clients can fully partner with you. Potential hazards evaporate with your candor at key junctures, including initial call, discussion (and enforcement) of policies and fees, follow-up, expansion requests, etc. This session provides specific language, tools and strategies to take your practice to a clearly higher level.

Objectives:

- Define transparency and its impact on client relationships and the work process
- Create up-front agreements that improve the sales process and establish positive client relationships
- Transfer skills and measure progress transparently
- Address client “problems” with grace and confidence, including missed sessions, delayed payments, lack of follow-through, scope creep, and so on

Presenters: Casey Moore, CPO®, ACC, PCOC

Friday, May 20, 2016 (Continued)

Location

3-5 Digital Eyes: Storytelling through Video Marketing

Georgia 2-5

Track: Trends/Tech/Social Media

Description:

Welcome to the human-to-human economy! We're no longer in a business-to-business world. Discover the most popular and effective marketing format for you to connect with ideal clients. In this session, you'll learn:

Video platforms and why they matter [YouTube, Skype, in-app Facebook, Instagram, and Twitter. Plus the live-streaming explosion of Periscope, Blab, and Facebook Live]

Objectives:

- Discover the various video platforms and differentiating factors among them. Tip: They're Not All the Same
- Understand the difference between your audience and your community. Tip: You'll Have Both
- Polish your online presence while embracing being real. Tip: Confidence Doesn't Equal Perfection
- Incorporate your videos based on the platform into your overall social media marketing strategy. Tip: Different Strokes for Different Folks
- Embrace the vulnerability attached to live-broadcasting. Tip: Shake It Off

Presenters: Mindy Rodenburg

3:30 PM – 4:30 PM

Awards Committee Meeting (**Committee Members Only**)

Executive Board Room

Networking Break

Multi-Person Business SIG Meeting

Georgia 6

Open to attendees interested in more information.

Coaching SIG Meeting

Georgia 13

Open to attendees interested in more information.

4:30 PM – 5:30 PM

Ask the Organizer Panel

Capitol Ballroom

This year we're going back to basics and there's sure to be something for everyone because YOU get to ask the questions. Join us as this dynamic panel of experts shares with you their pearls of wisdom. This is a diverse group of panelists and they each bring a little something different to the table. There's expertise with technology, social media, chronic disorganization, running a multi-person business and what it takes to sustain and grow a successful organizing business. This panel is a not-to-be-missed session for every organizer looking to improve their own business. Look for the box in the registration area to submit your questions.

Presenters: Standolyn Robertson, CPO®, Kim Oser, CPO®, Liz Jenkins, CPO®, Laura Ray, Helena Alkhas

5:30 PM – 6:30 PM

Speaking for Fees SIG Meeting

Georgia 13

Open to attendees interested in more information.

6:30 PM – 8:30 PM

President's Reception - Black & White Party Theme

Grand Ballroom

Open to all attendees.

Saturday, May 21, 2016

Location

6:30 AM – 7:55 AM

Breakfast on your own

7:00 AM – 3:00 PM

Registration Open (Registration Booth)

Georgia Registration
Booth

7:00 AM – 8:00 AM

Moving & Relocation SIG Meeting
Open to attendees interested in more information.

Georgia 13

8:00 AM - 9:30 AM - Concurrent Sessions

4-1 Industry Statistics and Trends: The Impact of NAPO

Atlanta Ballroom

Track: Research

Description:

Get a glimpse into the minds of our clients and the general public as we share highlights from the most recent NAPO Industry Survey. Through small and large group discussion, we will analyze specific areas of interest and determine how we might be able to address challenges, review our business models, and initiate change to impact our clients' lives as well as our industry. As an added bonus, we will share news about NAPO's enhanced Information and Research initiative.

Objectives:

- Identify results and trends from the most recent NAPO Industry Survey
- Discuss behaviors and tactics to impact the organization and productivity industry
- Apply newly acquired knowledge to work with clients

Presenters: Lori Vande Krol

4-2 Veteran Forum Interactive (GOLDEN CIRCLE MEMBERS ONLY)

Capitol Ballroom

Track: Business Growth/Marketing/Leadership

Description:

As our industry matures and business models evolve, issues arise that we didn't anticipate when we launched our organizing careers. This highly interactive panel discussion will tackle such topics as burnout, the physical demands of our work, the challenges of business growth, transitioning from working "in" to "on" the business, changing business focus in major ways, moving and ramping up in a new market, selling our business, and other relevant topics to the seasoned professional organizer.

Objectives:

- Utilize the experience of veteran organizers who have successfully managed a variety of business transitions
- Navigate selling one's business or starting over in a new city
- Change business focus with minimal disruption to revenue
- Manage business growth and the challenges of employees and sub contractors
- Deal with industry burnout and the physical demands of our work

Presenters: Barry Izsak, CPO®, Diane Hatcher, CPO®, Sheila Delson, Katherine Trezise, CPO®, CPO-CD, Carla Binswanger

4-3 Seven Truths to Becoming a Published Author

Georgia 10-12

Track: Special Interest Group**Description:**

Is fear crushing your inspiration to write? Are you struggling to publish or market your book? It's not difficult; all it takes is a little guidance and some tools. Shawndra shares the seven truths to becoming a published author. Need motivation to write? Find the answers that make writing possible. Want to get published? Find the resources that make self-publishing easier. Need to market your book? Find the solutions that connect you with your readers.

Objectives:

- Identify the key activity that will encourage you to own the title "writer"
- Learn about the tools and resources that can simplify self-publishing
- Discover the path that connects you with your audience

Presenters: Shawndra Holmberg, CPO-CD®**4-4 Play! The Secret Ingredient to ADHD Motivation**

Georgia 7-9

Track: Specific Needs Clients**Description:**

Getting the mundane tasks of daily living done can be a challenge for anyone. But for people with ADHD it can feel impossible. Research illustrates clearly that people with ADHD require a higher level of motivation to get boring stuff done. Play is a natural remedy to raise motivation and improve attention and focus. When you learn to make any task fun you have learned one of secrets to managing the ADHD brain.

Objectives:

- Increase understanding of motivation and what this looks like (or doesn't) in the ADHD brain
- Learn the characteristics of play and how to leverage play to get things done
- Identify mundane or boring tasks that participants often procrastinate on and identify playful strategies to get them accomplished
- Learn how to identify demotivating tasks and create a personalized plan of action to help your clients get S*** done

Presenters: Deshawn Wert, B.S., M.Ed, Kirsten Milliken, Ph.D., ACC**4-5 Holistic Time Management: Learn, Teach, Sell**

Georgia 2-5

Track: Organizing and/or Productivity**Description:**

Everyone relates to time differently which is why in this session, we'll explore a practical, holistic approach to time management that honors these differences. Time management training isn't about giving clients your system, it is about helping them discover their own. You will learn how to guide your client into their own time system that will fit their life and natural work style - and actually last.

Objectives:

- Use a specific framework for how to design a personalized time management system with your clients
- Understand what needs to be in place before clients can make progress with their time – and maintain their physical organization
- Accelerate habit formation using 3 science-based strategies
- Begin integrating time management into your organizing business immediately

Presenters: Julie Gray, COC, ACC**9:30 AM – 10:30 AM**

Networking Break

Small Business Organizing SIG Meeting

Georgia 13

Open to attendees interested in more information.

10:30 AM - 12:00 PM - Concurrent Sessions

5-1 Booming your Baby Boomer Business: Research-based Understanding of this Pivotal Age Group

Georgia 2-5

Track: Research**Description:**

Baby boomers, roughly in the 50-69 age range, have reached a pivotal point in their lives and face special challenges organizing health, wealth, and legacy information. This means opportunity and impact for specialists in productivity and organizing. You won't want to miss this session where you will glean research-based guidance on better understanding the information management needs of this target group, including initial outcomes of an on-going study that engaged NAPO professionals as participating experts.

Objectives:

- The approach: Appreciating how and why an evidence-based (research) based approach can assist in your personal efforts and advance the profession
- The situation: Understanding the special health, wealth, and legacy information challenges facing baby boomers, for both tangible and digital information
- The opportunity: Determining approaches and tools for health, wealth, and legacy information management that might best suit this generation in their current status

Presenters: Nicole Chamblin MA, CPO® CPES®**5-2 Achieving Balance and Creating Peace with Organizing**

Capitol Ballroom

Track: Organizing and/or Productivity**Description:**

In this session, participants will understand the importance of a calm working environment for both organizer and client. Through case studies and group discussion, Amy and Suzy will demonstrate best practices for flexible, goal-oriented sessions; physical stamina and guiding changes in both attitude and roadblocks.

Objectives:

- Create action plans for client sessions that keep goals in mind while allowing for flexibility
- Develop a strategy to keep both client and organizer physically able to participate in the session
- Understand the importance of attitude and preconceived impressions while organizing
- Recognize what limitations are affecting client sessions, both from the organizer and the client
- Learn how to address these situations in order to continue making progress with your client and within your practice

Presenters: Amy Trager, CPO®, Suzy Margolis Hart**5-3 How to Keep Your Business From Becoming theIRS!**

Atlanta Ballroom

Track: Business Growth/Marketing/Leadership**Description:**

The goal of this training program is to guide you in the discovery of: what small business tax responsibilities really are; the top deductible expenses to minimize tax liability; the actions that can trigger an audit and how to avoid them; and the most simple and effective ways to keep/organize your records for tax day!

Objectives:

- Learn what small business tax responsibilities really are
- Discuss the top deductible expenses to minimize tax liability
- Review the actions that can trigger an audit and how to avoid them
- Determine the most simple and effective ways to keep/organize your records for tax day!

Presenters: Sherry Darden

Saturday, May 21, 2016 (Continued)

Location

10:30 AM - 12:00 PM - Concurrent Sessions (Continued)

5-4 Profit & Add Value with Online Training

Georgia 7-9

Track: Trends/Tech/Social Media

Description:

If you're thinking of adding online learning to your services, this session is for you! Online learning helps you extend your value to clients by offering your resources and expertise between live sessions. You can expand your reach to those outside of your geographic area, and create different income streams (even some that will work while you sleep!) Learn what makes great online content, explore the different delivery systems, and types of membership sites.

Objectives:

- Complete a Gap Analysis to determine information your clients need most
- Examine what makes good online content
- Explore different delivery systems such as video, audio, webinar and e-courses
- Explore different learning platforms available: Free, Fee & Membership
- Create your content outline

Presenters: Cena Block

5-5 What's Next? Planning an Effective Business Exit Strategy

Georgia 10-12

Track: Business Growth/Marketing/Leadership

Description:

When will your business come into maturity? Reap the benefits of your investment of time, energy, and finances and funnel it into a well thought out exit strategy. We will cover selling your business/portions of it, licensing/selling your intellectual property, creating do-it-yourself services, having employees or independent contractors run your business, obtaining a position as an "in-house organizer" for an organization, engaging in a complete career change, or simply retiring.

Objectives:

- Learn about different forms of "exiting" your business, including selling your entire business or portions of it, licensing and selling your intellectual property, creating do-it-yourself versions of your services, maintaining the business but having employees or independent contractors operate it instead of you, obtaining (or creating) a position as an "in-house organizer" for an organization, engaging in a complete career change, or simply retiring
- Reap the benefits of your investment of time, energy and finances and funnel it into a well thought out exit strategy
- Hear about real life case studies of organizers who have exited the industry using one of the covered exit strategies
- Learn how to prepare for your exit strategy years in advance

Presenters: Lisa Montanaro, JD, CPO®

12:00 PM – 1:45 PM

Casual Lunch

Garden Courtyard

2:00 PM - 3:30 PM - Concurrent Sessions**6-1 Information Afterlife and the Digital Estate Plan**

Georgia 7-9

Track: Organizing and/or Productivity**Description:**

If your client died, would their digital accounts and assets be accessible? Is their website, blog, and social media safe from criminal mischief? Manage their 'information afterlife' with a Digital Estate Plan (DEP) that: accounts for digital assets overlooked by their estate, provides for safe transference of login information, protects digital information from unauthorized access, learn to do a DEP, a great way to extend your service line into the lucrative area of digital information.

Objectives:

- Extend your current service line into the lucrative area of digital information or value-add it to a service already provided
- Learn how to protect your client's 'information afterlife'
- Create a Digital Estate Plan for yourself and your clients

Presenters: Judith Kolberg**6-2 Strategic Planning to Grow Your Business**

Georgia 2-5

Track: Business Growth/Marketing/Leadership**Description:**

As a micro-business owner you probably spend more time working in your business rather than working on your business. So how do you really know how you're doing and more importantly... how to do better? In this Enhanced Session we will go through the Strategic Planning Process just like the bigger businesses do. And when you walk away you will have a concrete plan that defines your vision; mission; where you are today; strengths, weaknesses, opportunities and threats; and finally what steps you need to take to get where you want to be. For anyone who has been in business 5+ years and who has never taken the opportunity to create a strategic plan, this session is a must! If you are just beginning in your business this session will help you strategically plan where you want to be in the future.

Objectives:

- Gain a clear understanding of what elements make up a strategic plan
- Create or revisit your company vision and mission – the statements that succinctly define your business
- Reflect on their current internal and external situation as well as define your ideal internal and external situation, including creating an organizational chart
- Complete a Strengths, Weaknesses, Opportunities and Threats (SWOT) analysis for your business and use the information to guide the creation their business goals
- Create an Action Plan for your business and develop strategies to stay on track
- Walk away from this session with a clearly defined strategic plan that you can follow to grow your business!

Presenters: Katherine Jenkins, CPO®, CFMC

Saturday, May 21, 2016 (Continued)

Location

2:00 PM - 3:30 PM - Concurrent Sessions (Continued)

6-3 Leveraging a Competitive Market: Building Your Personal Brand

Atlanta Ballroom

Track: Business Growth/Marketing/Leadership

Description:

What if I could show you that the key to continued success for your business exists within you right now? International reputation management and personal branding expert Lida Citroën will show you how to build your personal brand and leverage your unique value to position yourself effectively in person and online. Full of examples, this session will cover networking and social networking, messaging and image to build a sustainable and successful brand and business!

Objectives:

- Identify your unique value proposition (and brand) as it relates to the market and clients' needs
- Position themselves and your business to stand apart from competitors
- More clearly identify who is an ideal client and why
- Learn how to build your brand through social media, networking and client engagement
- Measure the success of your branding to make smart marketing investments in the future

Presenters: Lida Citroën

6-4 Down With Digital Clutter!

Georgia 10-12

Track: Trends/Tech/Social Media

Description:

Participants will create a personal digital action plan and receive a digital clutter assessment tool designed specifically for professional organizers who wish to assist clients in digital decluttering and organizing. Participants will have the opportunity to assess whether they wish to offer digital decluttering and organizing services in their practices. We will review possible pitfalls, liability issues and best practices to be considered when offering digital organizing support.

Objectives:

- Learn how to curate digital data
- Learn to locate digital files with joy and ease
- Apply values to separate the essentials from the junk
- Cure "email overload syndrome" once and for all!

Presenters: Pam Holland

6-5 Unstuck, Uncluttered and In Charge with Mindful Presence

Capitol Ballroom

Track: Organizing and/or Productivity

Description:

Examines how our clients get stuck, procrastinate and get locked out of productive choices. Provides a handful of Practical Zen Brain Hacks to reframe sources of overwhelm, then a set of powerful questions to unlock the door to clarity and action. A fun, interactive session benefiting disorganized individuals and the professionals who serve them.

Objectives:

- Gain a better understanding of irrational inertia...and impulsive "escapes" from what needs to be done
- Discover ways to deconstruct frustration and paralyzing overwhelm that yield to action
- Identify a powerful set of questions to pose when stuck or fearful, the answers to which we all hold within
- Discuss a toolbox of easy-to-implement "brain-hacks" that you can put to work immediately – for yourself and your clients

Presenters: Alan Brown, BS, AAC

3:30 PM – End of Conference