

**San Francisco Bay Chapter of the National Association of Professional Organizers**  
**19<sup>th</sup> Annual Regional Conference**  
**Saturday, October 27, 2007**  
**San Ramon Marriott Hotel, San Ramon, California**

**Workshop Descriptions**

<b>Session One</b>
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**1.1 Tech-Savvy Organizing**

You're committed to tackling your clients' stress, overwhelm and information overload—their most intense pain points—but are your solutions leaving them in the last century? Technology tools help automate routine tasks to save time, shape processes more efficiently, enhance "findability" (the holy grail of the organized life!), and convert the onslaught of information into usable knowledge, not buried treasures. But who has time to research the complicated maze of today's digital solutions? This session is your shortcut! Find out what's new, what works, and what's real in tech-savvy organizing.

Jocelyn Coverdale specializes in productivity training and consulting for busy professionals, whether they work in the world of paper or the world of "1's" and "0's." A former IBM-certified technical trainer and a current Paper Tiger consultant, Jocelyn is, admittedly, something of a "geek." She has trained with Harold Taylor, DME Training (the GO System), and the Hemphill Productivity Institute.

[www.ballantraesolutions.com](http://www.ballantraesolutions.com)

**1.2 Starting and Managing a Business**

Do you want to have a successful business? Every business or business expansion starts with a business plan. Sitting down and planning your business—a mission statement, goals, market research, marketing, operations, and financials—are extremely important to your success. So what's the process? What are the areas you need to address? If you've been putting it off or you don't know what a business plan is, this fast-paced and information-packed workshop is for you.

Sandy Stelter, JD, CPO®, is the founder of Strategic Organizing Solutions (SOS). She currently serves as Secretary of the National Association of Professional Organizers Board of Directors, is a past president of NAPO-SFBA, and received the 2006 Service to NAPO Award. Through the Small Business Development Center, Sandy assists small business owners achieve their goals to own a business. [www.sos2day.com](http://www.sos2day.com)

**1.3 The Essence Conversation**

Living from essence empowers choice and leads to greater satisfaction, trust and balance. Learn how human survival mechanisms create automatic, fear-based ways of being. Discover new coaching techniques of the Essence Conversation that will help you close the gap between where you are and where you want to go. In this powerful interactive workshop, learn a new recognition of your power, greatness, and authenticity, or essence. Learn practices that will shift your business and create a powerful new context for marketing as well as developing and maintaining business relationships.

Darlene Batchelder is an ontological coach affiliated with Accomplishment Coaching in San Diego. She lives in the Bay Area and focuses on coaching small business owners to grow and improve their businesses.

[www.accomplishmentcoaching.com](http://www.accomplishmentcoaching.com)

Stan Karp enables and empowers people to reach their dreams and goals through personal coaching. Clients overcome roadblocks and fears that are holding them back. Stan's education includes the year-long Accomplishment Coaching Coaches Training and Leadership program, as well as degrees in math, computer science, and business. [www.accomplishmentcoaching.com](http://www.accomplishmentcoaching.com)

#### **1.4 Nature and Nurture: It All ADDs Up**

Are you challenged by your clients with Attention Deficit Disorder (ADD)? Do you feel at a loss when trying to help those with endless energy but no focus? Learn a myriad of techniques to help your ADD or ADD-like clients bring balance to their lives by helping them with issues such as focus, motivation, and time management. Learn, too, how to maintain a balance between your personal life and these challenging clients. Kim will offer the more “traditional” methods unique to assisting ADD and Chronically Disorganized (CD) clients, and Margaret will present some new “non-traditional” methods using nature and other alternative techniques.

Kim Anker-Paddon, CPO-CD®, works largely with adults with ADD. She has seen the gifts and challenges of ADD through many eyes: teacher, mother, spouse, and business partner. Her clients’ goal of achieving balance is the primary focus of Kim’s organizing work. [www.kaporganizing.com](http://www.kaporganizing.com)

Margaret Pearson Pinkham, a professional organizer since 2004 and former park ranger/naturalist, enjoys bringing her love of nature to organizing and her CD clients. She holds all nine NSGCD Level I and both Level II certificates (CD and ADD). [www.organizeinharmony.com](http://www.organizeinharmony.com)

#### **1.5 Putting the Jigsaw Pieces of the Business Organizing Puzzle Together**

Business organizing is more than the sum of its parts. Many organizers keep busy with individual elements of a business—files, desk top, time management, workflow, paper flow, electronic files, forms, scheduling, and space layout/design. The real challenge is when you put all of these odd-shaped pieces together to create the "big picture" of business organizing. Learn what it takes to do business organizing. Discover the keys to assessing the situation. Broaden your knowledge about writing successful proposals. Find the secret of how to tag on other projects. This workshop will challenge you to think bigger, step up higher, take risks, and grow your business.

Angela Wallace, CPO®, of Wallace Associates combines consulting, coaching and organizing services. From small organization challenges to complex projects, Angela helps clients achieve results. A recognized leader in training entrepreneurs and professional organizers, she is a current NAPO board member and a two-term past president of NAPO-SFBA. [www.wallaceassociates.net](http://www.wallaceassociates.net)

#### **1.6 So Your Client Wants To Move**

Small moves, big moves, local, interstate or international moves—moving is a daunting task. With hundreds of moving companies to choose from, selecting the right team and putting together the proper procedures and steps are vital to ensure a successful and stress-free move for your client. Moving is far more complex than just transporting your clients’ possessions from one home to another. Learn the steps you need to follow from the time you first consider taking on the project until the day clients are fully settled in their new home. Discover how to effectively remove anxiety and stress that come with moves and relocations.

Chantale Bordonaro, CPO®, has been a member of NAPO since 2004 and is the owner of Simplicity Source which operates in San Francisco and Los Angeles. She currently serves on the NAPO-Los Angeles Chapter Board as Membership Director. [www.simplicitysource.com](http://www.simplicitysource.com)

Charlotte Scott is the owner of Custom Moves Solutions operating on the San Francisco Peninsula and in the South Bay. With the help of their two teams, independent contractors and vendors, Charlotte and Chantale have helped over 200 clients balance the life-changing experience of moving. [www.custommovesolutions.com](http://www.custommovesolutions.com)

## Session Two

### 2.1 Icky, Sticky Situations

Scabies, rashes, leaking chemicals, toxic waste and dump runs, mildew, mold, endangered children and seniors, broken antiques, poorly packed and broken precious objects, missing items, scratched floors, wrecked walls, mental illness, scary dogs, schizophrenic relatives, suicide attempts and needle sticks! Skip the physical, financial, and emotional pain of these extreme organizing situations. Vicki will share her nightmare jobs and teach you to fine tune your “intake form” so you don’t forget to ask what you need to know. Learn what you should always carry in your car so that you can safely work in dirty situations. Brainstorm and handle a real life scenario.

Victoria Roberts, CPO®, has had a varied path leading to her life in organizing. She worked in the hotel industry, property management, legal compliance, office management, and film styling. She has integrated problem solving, public service, space, function, and aesthetic improvements into the professional organizing business she founded in 1998. [www.victoriarobertsorganizing.com](http://www.victoriarobertsorganizing.com)

### 2.2 Simple and Sustainable Organizing: Balancing With the Earth (Panel)

As professional organizers, we are in the business of helping people simplify and improve their lives. Doing so in ways that balances our clients' needs with the health of the planet adds value to our business and brownie points to our karma. But how do we do so? Many of us feel isolated in our efforts to be “greener” organizers. We find ourselves asking: How can we help our clients recycle their discards? Where can we find earth-friendly organizing products? How can we become more aware as consumers? How can we educate our clients to be “green”? This workshop answers these questions, and more.

Claire Josefine, author of *The Spiritual Art of Being Organized* and “Simplicity-Based Ethics,” has pioneered integrating spirituality and simplicity with professional organizing. An ADD specialist and founder of the Simple and Sustainable Organizers web group, Claire lives in Eureka, California. [www.clairejosefine.com](http://www.clairejosefine.com)

Maggie Watson, a professional organizer for 20 years, is author of *A Graceful Farewell: Putting Your Affairs in Order*. She is a mother of a teenager and an active member of her community. She and her husband own Mendocino Solar Service. [www.agracefulfarewell.com](http://www.agracefulfarewell.com)

Colleen Warmingham is only the third professional organizer in the nation approved by Co-op America and listed in their National Green Pages™! She is the inventor of Artalendar™, a sustainable time management system designed for creative thinkers. Visit her websites: [www.artalendar.com](http://www.artalendar.com) and [www.colleenw.com](http://www.colleenw.com)

Amanda Kovattana, a Golden Circle member, is co-chair and founder of the NAPO-SFBA Green Special Interest Group (SIG), former NAPO-SFBA Program Director, an environmental leadership program graduate, an organic gardener, avid cyclist, and electric-car owner. She regularly contributes to the Energy Bulletin website. [www.handyamanda.blogspot.com](http://www.handyamanda.blogspot.com)

Holly Sherman, CPO®, graduated cum laude from Ohio University with a BFA in Art History. She appreciates that, as a professional organizer, she is able to streamline recycling efforts, encourage voluntary simplicity, and educate others about being conscious consumers.

### **2.3 Confident Entrepreneurs, Successful Professional Organizers**

Discover how to shape the profitability of your business through the everyday personal choices you make. As an entrepreneur, you face numerous decisions that have considerable impact not only on the success of your business, but also on the very character of your existence. Through self-discovery you'll learn to easily and confidently make better decisions that will affect all aspects of your life. Explore which choices you've made that have had a profound impact on your business. Through better decision-making, find the confidence within and become more than just a competent organizer. Gain creditability by being recognized as an expert!

Tamah Vega is a mother of two who started A Sense of Home in 2004 to help busy moms create balanced lives. She is a very active member of NAPO-SFBA, and has over nine years of corporate management experience. [www.asenseofhome.com](http://www.asenseofhome.com)

Sherree Hellinger of Neatly Put has over five years' experience as a professional organizer. With her background working in growing and start-up businesses, she continues to pursue her passion for helping small businesses take the next step. Sherree is Immediate Past President of NAPO-SFBA. [www.neatlyput.com](http://www.neatlyput.com)

### **2.4 Everything You Wanted to Know About Certification—Except the Exam Questions and Answers!**

Is certification as a professional organizer critical to realizing your balance? Hear about the new Board of Certification for Professional Organizers (BCPO) program, what certification means, and why or why not to pursue certification. Assess the requirements to become certified and what documentation you need to assemble. Review the outline of exam content and list of resources. Find out what worked in studying for the exam and what you can do to prepare. If you are rusty taking exams, pick up tips in analyzing exam questions. (Specific BCPO exam questions and answers CANNOT be discussed.) Understand what it takes to maintain your certification.

Carol Thistlethwaite, CPO®, of Thistle and Company has over 20 years of experience in management, small business development, working with corporations, and helping individuals. After years of organizing computers, software, and developers, she decided to go legit and do organizing professionally. She now specializes in estate organizing and business organizing. Carol is the NAPO-SFBA Chapter Certification Liaison with NAPO. [www.thistleandcompany.com](http://www.thistleandcompany.com)

### **2.5 Feng Shui for Organizers: Balance and Harmony Starts at Home**

Are you always exhausted? Is your own home or office less than desirable? Can you accomplish great feats for your clients while your own home misses the mark? Are you attracting the right kind of clients to sustain your business? The answers may lie in the set-up of your home or office. Join Certified Feng Shui Consultants Kathleen Horvath and Matthew Chapman to learn transforming techniques to help shift your environments into spaces you love to work and live in. They will show basic principles for powerful and immediate results that you can incorporate into your space that very day! Let them help you bring the OM back into your hOMe.

Kathleen Horvath has seven years experience in and is a regular speaker on Feng Shui. Kathleen is trained in Classical and Western Feng Shui and has an international client base. She produced the audio book *Illuminating Feng Shui* due for release in autumn 2007. [www.5elementsgroup.com](http://www.5elementsgroup.com)

Matthew Chapman is a Feng Shui consultant with a background in design. Trained in Western and Classical Feng Shui, he also studied in China, where he learned 4 Pillars of Destiny Chinese horoscopes. He teaches Feng Shui in California. [www.interioreyes.com](http://www.interioreyes.com)

## 2.6 Face Reading

Face reading offers new insights into human behavior. This unique tool helps you immediately recognize how to best approach your client, build customer relationships, increase your sales, and better understand the people in your life. Discover why some people are always late and others are extremely fussy. Identify the bargain hunters or those more focused on service. Learn why some people are more disorganized and others are more of the perfectionist. Recognize the key traits that may create challenges and learn how to approach the client. Knowing more about the people you work with will help you be more effective.

Naomi Tickle is an international speaker, face reading expert, career consultant and author of *You Can Read a Face Like a Book* and *Closing the Sale*. Her books are used as tools for communications, sales and marketing, and building customer relationships. Naomi offers workshops and lectures throughout the United States, Canada, Australia and England. [www.thefacereader.com](http://www.thefacereader.com)

## Session Three

### 3.1 Working with Design Professionals: A Strategic Alliance

Learn the preliminary stages of interior design projects and how professional organizers can fit into that process. By understanding the informational and functional requirements interior designers use to develop project scope and design solutions, organizers will discover what questions to ask their clients, how to present information to design professionals, and how to work in tandem with designers to create functional and efficient work spaces. The basics of space planning and ergonomics will also be covered.

Jennifer Gustafson holds a degree in Interior Design from Harrington College of Design, a top-ten FIDER-accredited design school in Chicago, and she earned her Bachelor of Arts degree from the University of Minnesota. She is the Principal Designer of Haven Designs, Limited, a full-service interior design studio that she launched in 2001. [www.havendesignsltd.com](http://www.havendesignsltd.com)

### 3.2 The E-Myth Solution: More Money, More Life, and More Freedom

To achieve higher productivity, drive revenue growth, gain a competitive advantage, and get more out of life, you need to think and act like an entrepreneur. Learn how your dominant thinking perspective influences how you focus your time and attention—and determines your results! You'll discover the three fundamental E-Myth principles necessary to achieve the success you want and the work/life balance you crave:

- Your business must serve your life
- You have to work on it, not in it
- Your business is the product

Karin Iwata is an E-Myth seminar leader and presenter who has a deep passion for working with small business owners. Karin has coached and trained over 150 small business owners worldwide in all industries and sectors. She commands an exceptional knowledge of the concepts underlying the E-Myth point of view and E-Myth products and services. [www.e-myth.com](http://www.e-myth.com)

### 3.3 When Networking's Not Working: On Becoming a Balanced and Savvy Networker

Is networking not working for you? It's not the number of events you attend or volume of business cards you collect. Learn to avoid nine common mistakes most networkers make and employ the *Tao* of networking as you make lasting impressions and extend your sphere of influence through consciously connecting with others. This fast-paced interactive session delivers 26 tips for networking success. Receive coaching, tips, and support as you make networking work for you. Bring business cards.

Craig Harrison has trained chambers of commerce, convention and visitors bureaus, hospitality, sales, and entrepreneurial organizations on effective networking techniques. A past president of the National Speakers Association's Northern California chapter, Craig has been profiled in *The Wall Street Journal*, interviewed by BBC Radio, and published by the *San Francisco Chronicle* on various aspects of effective networking. [www.expressionsofexcellence.com](http://www.expressionsofexcellence.com)

### **3.4 Time Management for the Creative Client**

Do your clients freeze up when you say “time management”? Do you dread trying to convince creative thinkers that planning really will help them achieve their goals? The problem isn’t you or the client! Join us to understand the creative thought process and learn strategies for helping your gifted clients build and act on effective to-do lists, avoid overload, and keep sight of their goals. Time management doesn’t have to be boring for them or a struggle for you. With these hints you’ll hear your client say “Thank you! I finally feel in control!”

Colleen Warmingham is a green organizer who specializes in helping creative and entrepreneurial clients realize their dreams. Her efforts to make time management fun for clients culminated in the invention of the Artalendar, the first calendar with no straight lines. [www.colleenw.com](http://www.colleenw.com)

### **3.5 Developing Your Ezine: The Electronic Newsletter for Keeping in Touch with Your Clients Today**

Ezines are the new marketing tool that enable organizers to stay in touch with their current clients and sell their products and services at the same time. Ezines allow you to increase your revenue stream without on-the-job organizing hours. Ezines also empower your subscribers to learn how to become more organized through your articles and tips. You will learn how to write, publish, and promote your Ezine easily and effectively in this session. Ezines are an important business development tool for all organizers, new or experienced.

Shannon McGinnis, CPO®, has over 20 years of experience creating organizational systems for her clients. She helps her clients clear clutter in their homes and offices. Shannon offers confidential, non-judgmental sessions, classes and workshops on a wide variety of organizational topics. [www.organized4success.com](http://www.organized4success.com)

### **3.6 Working with the Child Client: Bringing Balance to Families**

When working with adult clients, we tend to rely on the information provided by the clients themselves and the condition of the space. Working with children offers a different kind of challenge. Oftentimes they are unable to communicate enough information, and their space is under the influence of the authority in the house. Join April Welch in this energized session that will teach you the tried and true techniques that work with her child clients and balance the families with whom they live.

April Welch, CPO®, resides in the central Cascade Mountains of Washington State with her two sons (*aka* test subjects for future client understanding) and her firefighter husband. She has been organizing child clients for thirteen years and has been getting credit for it for almost four. <http://simplyorganizedonline.com>