First Professional Organizing Project Kit

Guide one small client project from the first conversation to a usable handover.



For a beginner organizer preparing a first bounded client project. Work through intake, permissions, session planning, client-owned decisions, practical storage trials, and follow-up. Includes a fictional entryway example and six printable worksheets.

GUIDE AND PRINTABLE WORKSHEETS

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Sort Through Client-Owned Decisions

Sorting is a sequence of small decisions, not an instruction to discard a target percentage. Present an item or a manageable group and ask what role it has in the client's life. Does it support the agreed activity here? Does it have a known home elsewhere? Does somebody else need to decide? Keep your questions open enough that keeping the item remains a legitimate answer.

If the client is unsure, make the choice more concrete: 'When would you look for this?' or 'Who uses it, and where?' Avoid questions that contain your preferred answer, such as 'You never need this, do you?' Your personal taste, tolerance for duplicates, or preference for an empty surface is not the client's decision rule.

In Morgan's example, the daily keys stay in the entryway. A spare cable has a known home elsewhere, so Morgan agrees to relocate it to that named place. A sealed letter is placed in a pending folder for Morgan to review privately. A borrowed item remains pending until its owner is confirmed. Each has a different next action.

Record only decisions that need a memory aid or follow-through. You do not need an inventory of every ordinary object to document a shelf trial. Use a short item or batch reference, the client's decision, the approved destination, the responsible person, and its status. Record completed movement separately from the intention to move it.

When the client changes their mind, stop and update the record before acting. 'You had put this with the donation candidates; would you like it returned to the keep group?' makes the current choice clear. Do not argue from a previous tick or use the approaching finish to pressure a permanent decision.

Watch the size of the active sorting area. Close one batch before opening another, and keep all routes usable. If discussion becomes tiring, move to an easy reversible task or take the agreed break. The number of decisions made is information about the session, not a score of how cooperative the client has been.

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20 / WORKSHEET

Home-Use Trial and Rehearsal

PRIVATE WORKSHEET. Test the client's everyday activity before making the arrangement permanent. Record what the client demonstrates and reports. Use existing materials where suitable and agreed.

Project reference; activity, starting position, and items used:

Item / category	Trial home / label	What worked or felt awkward

Departure / retrieval test: what happened without your directions?

Return / reset test: reach, visibility, capacity and extra steps:

One change to try, result of retest, and client's chosen routine cue:

The client explains where things go and how pending items are reviewed. A working trial does not guarantee permanent habits. Record another household member's unanswered needs rather than assuming their agreement.

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