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My Favorite Collaboration Partners

By *Suzy Wilkoff*

Collaborating with professionals for the benefit of our chronically disorganized (CD) clients often involves building relationships with the mental health community. I have extended my collaborative efforts beyond this group to include CPAs, lawyers, personal assistants, and moving companies on my extended team.

CD clients may become paralyzed when enlisting the help of professionals. Additionally, when they research service providers on their own, they don't necessarily evaluate them thoroughly.

That's where we intercede to scrutinize the services necessary to complement the organizing process. Anyone we collaborate with should be insured, must agree to confidentiality, and should provide references.

Divorce Issues

An example of a client base where collaboration with service providers is critical is individuals going through a divorce. For some of these clients, during their marriages, their spouses handled many of the personal business responsibilities. Whenever I am brought into a divorce scenario,

with the blessing of the client, I am introduced to his or her lawyer and CPA, who hopefully are collaborating with one another.

Once the client and I have installed a user-friendly filing system or tweaked an existing one, we sort and organize documents for the lawyer and CPA. This includes determining a schedule for providing documentation from the client to the CPA and lawyer, which is crucial to a CD client from a time management perspective.

Additionally, if the client needs to enlist the services of a new CPA because he or she doesn't want to maintain the one the couple had used while married, I assist with the vetting process. For clients who value confidentiality, it's important to choose CPAs and lawyers who are highly professional and compassionate, as well as qualified.

Setting Out on Their Own

Although the goal of my work is transference of skills to the client, due to the emotion involved, I occasionally find that the client prefers that I communicate with his or her attorney and then recap and clarify before the end of an organizing session. As the client becomes more comfortable with

our work, I encourage him or her to do more of the communication with the attorney.

When the client understands the system, if the individual is financially able to enlist the services of a personal assistant, I collaborate with the assistant and then follow up on a regular basis to ensure things are running seamlessly.

For divorced clients who relocate, when collaborating with moving companies, I insist that the management and employees share my non-judgmental approach. This includes educating them on chronic disorganization, often explaining that a move for a CD client is not "standard."

Collaboration with professionals we like and trust can result in building long-term business relationships. Through this effort we satisfy our clients' needs, which in the long run is our goal. The icing on the cake is that we occasionally obtain referrals from these service providers we are collaborating with.

Chronical contributor Suzy Wilkoff owns Tasks Unlimited in West Palm Beach, FL. You can reach her at suzy@tasksunlimited.com.