



PROFESSIONAL ORGANIZERS IN CANADA  ORGANISATEURS PROFESSIONNELS AU CANADA

2023 VIRTUAL SUMMIT
October 26, 2023
10:00 am – 7:00 pm Eastern Time



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POC SUMMIT | 10-26-2023 | SOMMET 2023 DES OPC

#POCSummit



PROFESSIONAL ORGANIZERS IN CANADA 2023 VIRTUAL SUMMIT

A MESSAGE FROM YOUR 2023 NATIONAL CONFERENCE COMMITTEE



Welcome to POC's 2023 Virtual Summit being live streamed on Thursday, October 26th.

2023 has been a year of adjusting and settling into a post-COVID world. When lockdowns began in early 2020, few of us imagined the long road ahead. Now, more than three years later, we're seeing a return to a semblance of normal with a renewed hope for a bright and prosperous future which means ... THERE'S NO STOPPING US NOW!

The NCC, along with the management team at Associations First, continue to learn from each previous Summit. As a result, we've built another professional and engaging event that is chock full of learning, networking and fun!

With another strong response to our Call for Presenters, we are happy to provide three blocks of concurrent professional development sessions that include a range of topics. If you are undecided about which session to attend or have a scheduling conflict with the date of the event, don't worry. We are once again recording all the Summit sessions so you can view them later. Recordings will be available to registered attendees in early November and remain available until December 31, 2023.

In addition to offering an outstanding line-up of presentation topics, this year's Summit will also include:

- Keynote Sarah McVanel
- Gamification and prizes throughout the day
- A Virtual Escape Room: Alice Escapes Wonderland

Be sure to attend the Annual General Meeting being held on Wednesday, October 17th from 4:00 PM – 6:00 PM EST.

We are confident you will come away from this year's Summit with the feeling that There's No Stopping Us Now!

Your POC 2023 National Conference Committee:

Georgina Forrest, Program Lead
Terry Cunningham, Conference Lead

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ONLINE TPO EXAM

WEDNESDAY, OCTOBER 25, 2023 | 12:00 PM – 1:00 PM EASTERN

Enhance your Summit experience! Eligible candidates will have the opportunity to write the proctored POC Trained Professional Organizer (TPO) exam **online**.

As the TPO exam is not part of the Summit, please note you must pre-register online:

- Candidates who intend to write the POC TPO exam must qualify by completing all required courses before registering. Those who wish to challenge the exam must meet certain conditions.
- Advance registration for POC's Trained Professional Organizer exam will close by midnight ET on **October 24, 2023**.

Register [here](#) for the POC Trained Professional Organizer Exam.

SUMMIT PROGRAM / SCHEDULE

THURSDAY, OCTOBER 26, 2023 | 10:00 AM – 7:00 PM EASTERN

10:00 am – 10:30 am

POC Expo

Visit our POC exhibitors in their 3D virtual booths and connect with them for live video chats

10:30 am – 10:35 am

Grand Opening

The 2023 Virtual Summit will get underway with an opportunity to meet the members of the National Board and general announcements.

10:35 am – 11:35 am

Breakout Sessions A

A1 – Why Maximalism is the New Minimalism: How Embracing This Movement Can Help Your Business

Presenter: Corinne Morahan (she/her)

Website: <https://www.gridandglam.com/>

Audience: All Audiences

The problem with minimalism is that it's not meant for everyone. As a Professional Organizer, I reject the idea that we all need to own as little as possible! Reaching for the unattainable (and often undesirable) result of having as little as possible can be harmful to our industry. It leaves our clients feeling like their home is never good enough. Instead, we need to embrace balance: filling our homes with the items that we need, use and love; and it is imperative that we understand that that threshold is different for each of us. In this talk, I'll walk you through what maximalism means and why it's so important to define. I'll explain why ignoring the maximalism movement is detrimental to your home organizing business, and how to recognize when a client is a "closet" maximalist. You'll leave with a greater appreciation for different organizing styles, and a better approach to working with your maximalist clients.

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By the end of this session, participants will have learned, and will have a clear understanding of the following:

1. What “maximalism” means in the professional organizing world + why it’s so important to define.
2. Why ignoring the maximalism movement is detrimental to your business.
3. Strategies to help your maximalist clients get organized.



Corinne Morahan is a Professional Organizer and Business coach, leading the industry in strategies to leverage organizing for mental wellness. As the Founder and CEO of Grid + Glam, her work has been featured in The Boston Globe, Architectural Digest, New York Magazine, HGTV Magazine, NBC News and more. Her 36K followers on Instagram love her for her sharp wit, sassy sense of humor and willingness to take action where others may quit. Corinne earned a Bachelor’s degree from the University of Michigan and a Master’s degree from Harvard University. She began her career working on Wall Street and currently lives just outside Boston, MA with her husband and two children.

A2 – Organizers: Get your Business Finances Organized!

Presenter: Jolie Viguers (she/her)
Website: <https://www.wellbeancoaching.com/>
Audience: All Audiences

As professional organizers, it’s crucial to not only keep your client’s spaces organized but also your own business finances. In this presentation, we’ll cover three essential strategies to help you get your finances in order. Firstly, we’ll explore ways to structure your bank and cash flow systems. By having a dedicated business bank account and setting up cash flow management, you’ll be able to track your income and expenses more easily. This allows you to better manage your finances, avoid confusion, and minimize tax surprises! Next, we’ll discuss the importance of tracking and bookkeeping for your business. Keeping accurate records of your income and expenses helps you stay organized and make better financial decisions as an entrepreneur. Additionally, it makes tax season less stressful and allows you to claim all the appropriate deductions. You may also discover opportunities for price structure changes! Finally, we’ll touch on integrating your business finances with your personal finances. By keeping them separate, you’ll then have clarity in the ways your business should fund your LIFE! You will confidently make better decisions around both budgets and planning for your future. By implementing these three strategies, you’ll be able to take control of your business finances, allowing you to focus on growing your business and confidently providing the best service possible to your clients.

By the end of this session, participants will have learned, and will have a clear understanding of the following:

1. Ways to structure their banking and cash flows.
2. Tracking and bookkeeping for your business.
3. Integrating your business finances with personal finances.

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Jolie Viguers is a CPA and Financial Coach with a passion to make her clients more confident with their money. She works with women to understand their money stories and deep values, in order to achieve alignment with their spending and investing. Resolving the stress and frustration of debt and cash flow struggles and transforming that into sustainable plans makes for a big impact! Jolie has worked as an accountant for 20+ years and is active in the Financial Independence community. She is also the leader at "Canadian Ladies Money Club" on Facebook, with a mission to normalize the conversations about money.

11:35 pm – 11:55 am

Break & POC Expo

11:55 am – 12:55 pm

Breakout Sessions B

B1 – Organizing with the Highly Sensitive

Presenter: Clare Kumar (she/her)

Website: <https://clarekumar.com/>

Audience: All Audiences

Clare credits being a "highly sensitive person" as the motivation to not only learn organizing and productivity skills, but also to share them with others. Too often, HSPs can feel overwhelmed by their environments, schedules, and social interactions. Clare feels called to shed light on this common trait and drive a universal understanding of the strengths and struggles that come with it. Not only will this be of value in working with your clients, with the trait appearing more prevalent in caring professions, there's a chance it could be enlightening for you, too.

By the end of this session, participants will have learned, and will have a clear understanding of the following:

1. The prevalence of neurodiversity and details of the trait of High Sensitivity.
2. How to tell if you or someone you know is an HSP (we'll take a quick quiz!).
3. Strategies for building a better client experience for highly sensitive clients.



Clare Kumar is a productivity catalyst, highly sensitive executive coach, and international speaker who examines the intersection of productivity and inclusivity – paying attention to both being and doing. She inspires individuals to design for well-being and cultivate sustainable performance while encouraging leaders to invite the richest contributions from every member of their team. Clare explores this topic with innovative thinkers as host of the Happy Space Podcast.

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B2 – Records Management Basics for Professional Organizers

Presenter: Jacki Hollywood Brown (she/her)
Website: <https://www.productivelyorganized.com>
Audience: All Audiences

Now, more than ever, we are bombarded with data, and it is increasingly difficult to know what information we need to keep and for how long. On top of that, we need to ensure the security and privacy of financial details, health data, and more. It's no longer enough for a professional organizer to set up colourful labelled folders in a filing cabinet. Understanding the basics of records and information management is essential. Professional organizers should understand The Principles® of records management, whether setting up their own filing system or helping their clients in homes or small businesses. Their methods should ensure that their clients' records meet operational, fiscal, legal, or historical obligations and are authentic, reliable, secure, and compliant with applicable legislation. It's a tall order! This session will provide definitions of terms used in the information governance industry and an overview of the records management process. Professional organizers will learn to communicate clearly with records managers and understand the benefits and limitations of paper and digital recordkeeping.

By the end of this session, participants will have learned, and will have a clear understanding of the following:

1. The components of a records management program including The Principles®.
2. The importance of retention schedules and citation tables.
3. Security, privacy, and disaster recovery.



Jacki Hollywood Brown worked in research and manufacturing, where accurate recordkeeping was integral to every job, before becoming a Virtual Assistant. As Document Controller for Kellogg's, she streamlined the facility's document control process for electronic and paper documents. Corporate Auditors identified her work as "outstanding" and used it as an example of best practices across Kellogg's North America. Additionally, Jacki created the document control procedures and processes for the Canadian Forces Morale and Welfare Services duty-free stores in the U.K. She holds a Master's Degree in Food Chemistry, a Certificate in Records Management, and has been an ARMA member since

2011. Jacki has been sought out for her expertise in the field and enjoys sharing her knowledge with others so they can be productive and organized.

12:55 pm – 2:00 pm

LUNCH & POC EXPO

2:00 pm – 3:00 pm

Breakout Sessions C

C1 – Get Smart with Your Smartphone Camera

Presenter: Danielle Turner (she/her)
Website: <https://www.velvetpumpkin.com/>
Audience: All Audiences

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Learn how to create compelling social media posts for your business using only your smartphone. Capture video and photos properly with your smartphone then discover how to edit that media on the same phone and finally post that media directly from your phone - all done on one device. Understand what all the camera options mean on your phone. Be aware of what makes a compelling video so that you gain loyal followers. Finally, some tips for best video/photo practices specifically for the POC industry.

By the end of this session, participants will have learned, and will have a clear understanding of the following:

1. Setup up their smartphone camera for various recording needs.
2. How and when to use the various lenses on their smartphone cameras - to capture compelling content.
3. What is compelling content from both videos and photos for professional organizers.



Danielle Turner has a reputation for not being your typical media expert. She has won several awards with her camera and media work, and she comes at this work with her firm belief that all media – video, photo & audio – needs to be compelling and that bad media can do just as much harm to a business and good media can do wonders for that same business. With a strong curiosity, an effort to stay well away from common and an ability to innovate, Danielle is a proven leader in this industry; working on all kinds of projects with businesses, film directors, governments and non-profits.

C2 – Demystifying Holistic Tools: Helping Overwhelmed Clients Get Back on Track

Presenter: Lauren Mang

Website: <https://www.letmeorganizeit.com/>

Audience: All Audiences

We've all run into sticky client situations during a client session: where a client pushes back, uses disparaging language about themselves, or completely stalls on getting started. Why is this happening? What's the best approach to take? Is there more than one approach? Typically the real reason stems deeper than basic nerves or overwhelm. Lauren Mang, of Let Me Organize It, believes in the holistic approach: a heart-centered focus to putting the client's needs in that moment first. Lauren will demystify the holistic approach, share case studies that will help attendees identify the 'why' behind the behavior, and share several new tools attendees can use to diffuse the situation, and get the client back on track.

By the end of this session, participants will have learned, and will have a clear understanding of the following:

1. Discover what "holistic" organizing really means.
2. What is behind the overwhelm and how to diffuse it.
3. How to recognize when clients are attempting to derail a session.
4. Seven holistic tools to get clients feeling safe and back on track.

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Lauren Mang is a compassionate, kind, and mindful organizer with a focus on holistic organizing. After a decade in the Fine Arts industry, living in New York, London, and Los Angeles, she relocated to San Francisco, started Let Me Organize It in 2014. She earned her CVOP™ in 2020 and her CPO® in 2021. In 2021, Lauren started a second company, Get Littles Organized. Lauren's other professional interests include public speaking, local volunteer opportunities, mentorship, and developing educational programs. When she's not working, she can be found distracting herself on Instagram or puzzling!

3:00 pm – 3:20 pm Break & POC EXPO

**3:20 pm – 4:20 pm Closing Keynote Presentation with Sarah McVanel
Recognition: Your Customer Retention Superpower**

How can you retain, delight, and exceed client expectations when the bar is continually raised? How do you bring your whole team along with you to fuel this exceptional customer experience? How will this enable you to maintain a healthy lifestyle while growing your heart-based business?

It's actually simpler than it seems. Every person needs to feel heard, valued, and appreciated. There is one overlooked, yet simple and powerful customer-facing strategy that every team member can execute on, regardless of tenure, role, or seniority – Recognition.

We give a lot of lip service to “customer satisfaction” and spend money measuring it. However, do we truly seek to form the deepest, most meaningful connection with our customers through micro-moments and long-term rituals? Do we truly value our customers and continually earn their trust and loyalty – even when we don't have to?

What does it take to cultivate a raving fan base? Customers who are as passionate about you as you are about them. Imagine what it will look like when your customers have an insatiable need to tell everyone how great it is to work with you.

This session is designed for business owners and sales associates who have a deep desire to delight customers for life. But wait – everyone has a customer! This session is also for those who are working inside organizations and are committed to a collaborative, harmonious, and mutually satisfying relationship. In other words, anyone involved in the customer journey (internal or external) who wants to retain, elevate, and enhance the relational customer experience will walk away with boundless ideas and actionable possibilities.



Sarah McVanel is a recognition expert, professional speaker, coach, author, recovering perfectionist, and movement maker. She created F.R.O.G. Forever Recognize Others' Greatness™ to invigorate companies so they can see their people as exceptional and, together, create a scrumptious, thriving culture where everyone belongs.

Sarah has 25+ years of experience training, coaching, and leading teams. From her senior leadership role, she founded her boutique firm Greatness Magnified. Proclaimed as the “Frog Lady,” she can be found freaking out perfect strangers (in a good way) by handing out squishy frogs and asking them,

“Have you been frogged lately?” and then acknowledging their greatness.

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She's a Certified Senior Organizational Development Professional (CSODP), Professional Certified Coach (PCC), and Certified Human Resources Leader (CHRL). She is one of 700 Certified Speaking Professionals (CSP) worldwide. She has a BA in Psychology, MSc in Family Relations, and Diplomas in Human Resources and Healthcare Administration.

You can catch her kayaking in the summer and snowshoeing in the winter with her husband or cooking a feast (while listening to an audiobook on double speed). She's a die-hard carb-ivour, amateur hip hopper, and TikTok embarrasser to her two kids.

4:20 pm – 4:25 pm	Break
4:25 pm – 4:55 pm	POC Awards Presentation
4:55 pm – 5:25 pm	POC 25 th Anniversary Initiatives
5:25 pm – 5:30 pm	Closing Remarks & Grand Prize Draw

5:30 pm – 7:00 pm	Social Networking Event – Alice Escapes Wonderland
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Alice is ready to go home, but her magic mirror has been stolen! Was it the Queen of Hearts? Perhaps it was the Mad Hatter? Follow the white rabbit and help Alice find the culprit so she can finally escape Wonderland.

You and your team will step into this 3-D immersive space together with your own avatars. Be curiouser and curiouser as you solve visual puzzles, answer riddles, engage in a scavenger hunt, and more! But beware of the Cheshire cat...

Your team will explore a 3-D world based around Lewis Carroll's creative story in this 90-minute virtual escape room event.

7:00 pm	Close of 2023 Virtual Summit
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POC 2023 Virtual Summit Registration Fees:



EARLY BIRD RATES:

Member: \$125.00 CDN (plus applicable taxes)
Non-Member: \$150.00 CDN (plus applicable taxes)

The Early Bird deadline is **August 31, 2023** at 11:59 pm Pacific Time.

REGULAR RATES:

Member: \$150.00 CDN (plus applicable taxes)
Non-Member: \$175.00 CDN (plus applicable taxes)

Don't miss out! [Register](#) today!

DISCLAIMER:

The views and opinions expressed by the presenters at POC 2023 Virtual Summit do not necessarily represent the views and opinions of Professional Organizers in Canada or the views and opinions of the organizations in which Professional Organizers in Canada members are employed or otherwise affiliated.