

Organizational Hacks to Help You Crush September



As summer winds down, many professionals - especially those in accounting and finance - are looking to hit the ground running. Whether it's a matter of closing Q3, prepping for year-end or launching new strategic initiatives, being organized is your new secret weapon. Strong organizational skills don't just reduce stress - they boost productivity, improve team collaboration and help leaders stay focused on high-value priorities. In essence, being organized is about reclaiming a sense of control.

Organizational skills allow you to efficiently and effectively use your resources. Without them, success in the workplace would be a struggle. It's important to acquire organizational skills early on but it takes time, practice and patience to master them.

The savviest professionals know that the secret to a strong fall isn't waiting for the chaos to begin. Now is the time to get organized, focused and ready. By putting the right systems, tools and routines in place now, you'll not only reduce stress but position yourself to lead with confidence when it counts.

Here are 8 organizational skills to get you pumped for September:

Review and Reprioritize Strategic Initiatives

Assess which major initiatives need to be completed by year-end and which can roll into next year. Engage stakeholders now to realign expectations, update timelines, and secure resources. Recalibrating strategies now allows you to adapt to changing market conditions and ensure continued success.

Staying ahead of trends will also help you capitalize on new opportunities so you can make the necessary adjustments to maintain a competitive edge.

Prepare to Win for Budget Season

Begin drafting high-level budget frameworks and set up budget prep meetings so you're not bottlenecked in September. Clarify assumptions, update forecasting models, and lock in preliminary timelines and responsibilities. Review historical data and organize key files in advance.

Budgeting is an effective tool for planning and resource allocation, so start preparing now and get ahead of the game.

Declutter Your Digital Workspace

A tidy workspace, free from clutter and disorganization, can significantly boost productivity and enhance focus. A clean and organized environment allows for better concentration and improved time management leading to more efficient and productive work.

Archive or delete outdated files, clean up your desktop and organize cloud folders by project or fiscal year. Set up naming conventions to save time later and improve collaboration with your team.

Clean Up Your Tech

Eliminate redundant tools, fix system bugs, and optimize integrations between Enterprise Resource-Planning (ERP), Business Intelligence (BI) and reporting platforms. Conduct a quick audit of dashboards and data flows to ensure reliable reporting in Q4.

Optimizing the finance role through a late summer tech audit will give you the tools needed to manage future complexities and provide insights driving profitability and growth into the fall and beyond.

Reorganize for Strategic Focus

It's essential to set time aside for strategic thinking and planning. Delegate operational tasks and work on creating a strategic culture that values long-term planning as well as immediate tasks.

Re-evaluate your own schedule, meeting structure and task management setup. Block time for introspective work and leadership coaching before things get chaotic.

Contact Key Stakeholders in Advance

Take on the role of a strategic business partner. Use some initiative and reach out to key stakeholders. Touch base with key department leaders (Sales, Ops and HR) ahead of Q4 planning to agree on financial goals and cost management strategies.

Taking the time now to build consensus will help to reduce friction later on in the year as key issues will have already been dealt with in advance.

Review Your Professional Goals

Take stock of your personal and professional development goals, especially if performance reviews or promotion discussions happen in Q4. Identify one or two skills to build on or certifications to explore this fall that might help to advance your career.

Start by assessing your current skills and identifying room for improvement. Set SMART goals for the fall season and don't forget to include work-life balance. Create a plan with actionable steps and a timeline to achieve your goals.

Revisit Your Time and Task Management Protocols

Time is a precious commodity, so be sure your systems prioritize the most essential tasks first. Start by tagging and categorizing fall-critical tasks so they don't get buried in the day-to-day. Embrace the potential of digital calendars and task management tools to up your game.

Focus on high-value activities that have the greatest potential for positive impact. Develop a clear system for organizing files and don't be afraid to delegate some tasks. Track how time is being spent to identify time-wasting activities and possible areas for improvement.

Organizational skills and self-discipline are two of the key drivers of business success. Taking the time to plan early will pay dividends once the busy fall season begins. Think of organization as an investment. Not only are you investing in your company's success, you're also making an investment in your own long-term success.

Being organized is a practice, not a finish line so keep at it. September is at our doorstep, so be ready to jump into your busy fall calendar full of energy and confidence!