

ORGANIZE FILES

There is no absolute formula for the perfect folder structure. Each business is different, so your file structure should reflect how your specific business works.

The most effective folders structures are easy to use, so you can intuitively find the files they're looking for. If it's too complicated, it will become a chore to organize, and you will not want to do it.

Keep in mind that a good file structure should work for your organization, not just you. If you have employees in your business, they may not search for a file the way you do, so formatting simply is best.

Your goal is to create a logical hierarchy that gives every file a home, making things easy to find and impossible to lose.

Here are a few tips and best practices to help you do this:

1. STORE DOCUMENTS IN A SHARED LOCATION, NOT ON YOUR PERSONAL COMPUTER

It's tempting to just save everything to "My Documents," but that creates two big problems. First, other people in your company won't be able to access those documents. You need to make sure you're saving files on a server, network drive or other shared location.

Second, if you have an IT department that has back up servers and network drives; they DON'T typically back up everyone's personal computer. So, if you save that critical proposal on your hard drive and your computer crashes, you'll be out of luck.

2. DON'T MIX BUSINESS AND PERSONAL FILES

Keep your business folders for business. You probably don't need everyone in the company seeing photos from your family vacation. Plus, you're costing the business more to store and backup your personal files.

3. GROUP BY CATEGORY

One of the most effective ways to organize your files is by category. Again, think of the grocery store. Foods are organized into sections like produce, dairy, packaged foods, etc. The trick is figuring out exactly what categories to use that make sense for your business's size, industry or how it's organized.

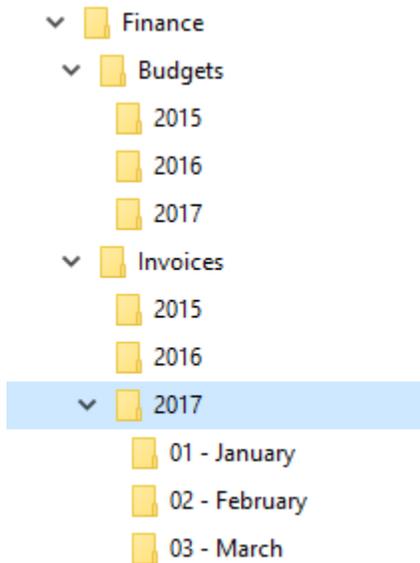
Here are a few different categories to consider:

- Departments – organize your folders by department or business function, such as Marketing, Finance, HR, [IT](#), etc.
- Clients – create separate folders named for each client with subfolders for all project details
- Products – if your business focuses on products instead of individual clients, you may want to organize your folders by product
- Users – if you need to keep some information private, you may want to create separate folders for each user. However, this probably isn't the best top-level category, because it can lead to "tribal knowledge." Imagine if five people are working on a project together, and you must dig through all five of their individual folders to find details on the project.

4. GROUP BY DATE

Many business activities (think reports or events) are reoccurring, so organizing by year or month makes it easy to identify the most current files and find past versions.

For example, you might structure a financial folder like this:



Consider organizing files by year or by month.

5. DON'T BE AFRAID OF SUBFOLDERS

Once you organize your files into categories, you'll want to add additional layers that help you narrow down even more. That's where subfolders come in.

Subfolders help create logical groups within your larger categories. For example, within a client folder, you might have separate subfolder for each project. Then within the project, you may have further subfolders for correspondence and contracts.

Of course, you don't want to go overboard, but most people tend to suffer from too few subfolders, not too many. If you find yourself dumping 50+ files in a single folder, you might want to add a subfolder. If you only have a handful of files, you probably don't need one.

6. USE FINAL, DRAFT AND ARCHIVE FOLDERS

Even if you know the right folder to look in, finding the correct version of a file can be hard. One way to help is to create subfolders for the stages of a task.

Use the Final folder for any documents that are completed and approved. For example, if you were doing a print brochure, you would put the final press-ready version in this folder.

Save work in progress or any revisions along the way in the Draft folder.

Then use the Archive folder to store old materials for reference, like notes, research, scrapped ideas, etc.

7. USE GOOD FILE NAMING CONVENTIONS

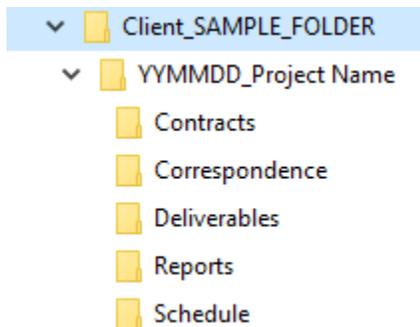
How frustrating is it when you're slogging through a mess of files with vague names like "presentation" or "notes." Use clear, descriptive file names that make it easy to identify what's in the file, no matter where it is. Here are a few best practices:

- Be concise; some software doesn't work well with long file names
- Use descriptive information
- For dates, use a YYYYMMDD or YYMMDD format, so dates stay in chronological order
- Use sequential numbering (01, 02, etc. instead of 1, 2, etc.)
- Avoid special characters (like ~ ! @ # \$ %, etc.)
- Use underscores (file_name) or dashes (file-name) instead of spaces (file name)

8. CREATE FOLDER TEMPLATES

Once you've designed your folder structure, create empty folders as a template so you can keep it consistent.

For example, if you organize your files based on client name, you'll probably want to use the same file structure over and over again for each client.



Create template folders that you can copy and paste to keep your structure consistent.

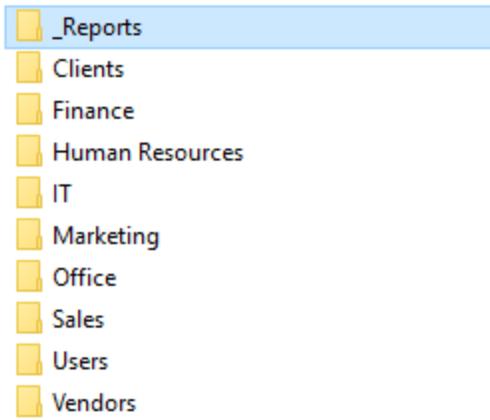
9. USE SHORTCUTS

Ideally, your folder structure should create a single "home" for each file. But sometimes there's overlap and it's hard to figure out where a file should go.

Rather than duplicating the file, create a shortcut. You can then move that shortcut to another location, but your original file stays in the same place. That way, you avoid the danger of having different versions of the same file.

10. DON'T FLOAT FOLDERS

This one's tough. When you're working on a big project, it's too easy to create a folder with a 1 or _ in front so that it "floats" to the top of your folder list. Resist the temptation!



Example of a floating folder with an underscore (_) before the name.

Floating folders are the easy way out, rather than committing to using an effective file structure. Furthermore, if others are looking for folders alphabetically, they could easily miss a floating folder and duplicate information.

11. STICK TO IT