

!Manager	
!Manager's Manager	
@Your job here	
Clients	
	By Name
District/ Region	
	By Rep / By Manager
Products	
	By Name
	Marketing
Programs	
	By name
Territory	
	By Account
Training Classes	
	By Topic or Audience
Administration	
	Business Plan
	Legal
	Travel Pending
Committees or Associations	
	Meetings
	Reports
	Programs
Financial	
	Budgets
	Expenses
	Invoices

HR	
	Benefits
	Compensation Package
	Policies / Procedures
Legal	
	Contracts
Marketing	
	Newsletter
	Social Media
	Lead Generating Speeches
Personnel	
	Candidates
	Colleagues
	Vendors
Personal	
Professional Development	
	Annual Review
	Goals (year)
	Training Class / Notes
Projects	
	Milestones
	Topic Areas
	Meeting with each

File It and Find It!

The goal of any file system, paper or electronic, is to be able to FIND that data AFTER it is filed. To do that, you need to keep it simple. The principles are the same whether it is paper or electronic.

DECIDE on 7-10 big buckets or big chunks of data, which would support all that you do for your job. That's right 10!! Not 20, not 50, not screens and screens worth.

That bucket list of files is called a file tree. Below is a sample file tree for your business purposes. Each bucket in the colored box represents a virtual hanging file.

The file names under the colored box represent files that are stored in the largest bucket or top-line topic. The file names to the right of that represent files that drill down within that. I encourage clients to drill down no more than two tiers.

The list presented here represents a sample of what your tree could look like. You will decide which specific files work best for you, i.e. if you are a pharma rep, you may need marketing info by product vs if you are a business owner, you may need marketing as its own bucket. An admin will need travel under each managers' bucket. This is a sample. Your job will have nuances that I can't possibly address, so tweak this tree to include those. Treat this as the frame onto which you build your own file tree.

The symbols in front of the first few file names "force" those files to the top of your electronic tree. Electronic files are sorted first by symbol, then by number, then by alpha. Knowing this enables you to float certain files to the top by frequency of need.

I suggest creating this file system in your Email file folders first. I once ask a client, "Does this paper have a home?" She answered, "Yes, but it is dysfunctional!" I find that my clients Email files are the most dysfunctional. START THERE. When that is completed and tweaked, mirror the exact same file system in My Docs and eventually to your paper files.

Remember keeping it simple, makes it sustainable.