Create a Consistent Filing System

Art Waskey

Art Waskey is a national speaker who delivers with power. With his 50 years including senior executive business man-agement, he consults with business owners, leading them in growing revenue at accelerated rates. Art is an author of multiple books on sales and writes weekly and monthly columns, The Art of Sales. He shares these insights as in-demand virtual events and conference speaker as well as leadership consultant. Check out his Posts on LinkedIn or the website. For services, contact Art at 720-341-9405, artwaskey@ispeakd. com, www.impact-speakingdynamics.com.

Transition to digital documents

Important business contracts and agreements that were once stored in rows of metal cabinets, are now filed digitally. We are in a new era of information storage, having progressed from cabinets in our office, to servers within our company, to storage in the Cloud. **It is important that you create a consistent filing system to accommodate this transition to digital documentation.**

A logical filing system

If a document is critical, such as a final signed contract, quotation, or spreadsheet, it should be kept within your permanent filing system. When the company I was with began to accumulate digital customer and vendor information, **I created a logical computer filing system that could be replicated by each sales manager and rep. Without a company-wide system, there would have been** mass confusion when trying to find the specific information in a timely manner. This was particularly true when salespeople were looking for quotations and contracts.

Consistency is important

We are entering into an advanced stage of data manipulation with the introduction of generative Artificial Intelligence (AI). **With AI, data can be searched to produce highly productive information but it must be well organized.** This makes having and maintaining a consistent filing system more important than ever.

Building a permanent filing system

There are 3 key actions to consider when building your permanent filing system:

1. **Save files by year. It is important to create new file storage each year.** Annual filing prevents data
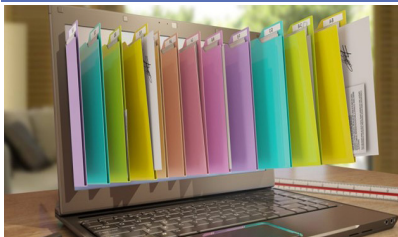
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clutter that can slow the search process. Referencing the year it was created, makes data easier to find. If you need to reference a file from a previous year multiple times, simply copy and paste it into to the current year for easier access.

2.   **Create 5 to 10 main folders.** Each year create new main folders that represent your focus areas. My primary folders include: Personal, ISD (business), Ministry (I'm an associate pastor), Art of Sales (for my books), Sales Articles (for regular publications), Seminars (I offer public speaking and training), Rockies (relating to season tickets for the Colorado Rockies), Weekly Reviews, and Planning Management.

Identify your core interests and obligations and create your folders accordingly. For example, as Senior Vice President of Sales for a distribution company, your folders might include: Personal, Business, Competitors, Sales, Vendors, and Sales Managers/Reps.

Creating folders by key responsibilities annually enables you to find specific documents in less than 15 seconds.

3.   **Use Archive folders.** How many times have you updated a document only to find that you didn't hit "save," or deleted it by accident. The Archive folder is used to keep a historic record of files so you can recreate records if they are lost. Archiving saves endless hours of work and maybe even a client or a job!

I update my invoicing and expenses weekly, and I always keep some of the past copies of this spreadsheet in the Archive folder. That way, if I were to lose the current sheet, I have historic data I can use to rebuild a new spreadsheet.

The consistent filing system
By saving files by year, creating folders by key responsibilities, and archiving important documents, you create **a consistent filing system that makes your business more efficient.**

5 KEY TAKEAWAYS

1. Create a consistent and well organized filing system for digital records.
2. Save files by year.
3. Identify your core interests and obligations and create file folders accordingly.
4. Archive important or critical files.
5. A consistent filing system makes your business more efficient.