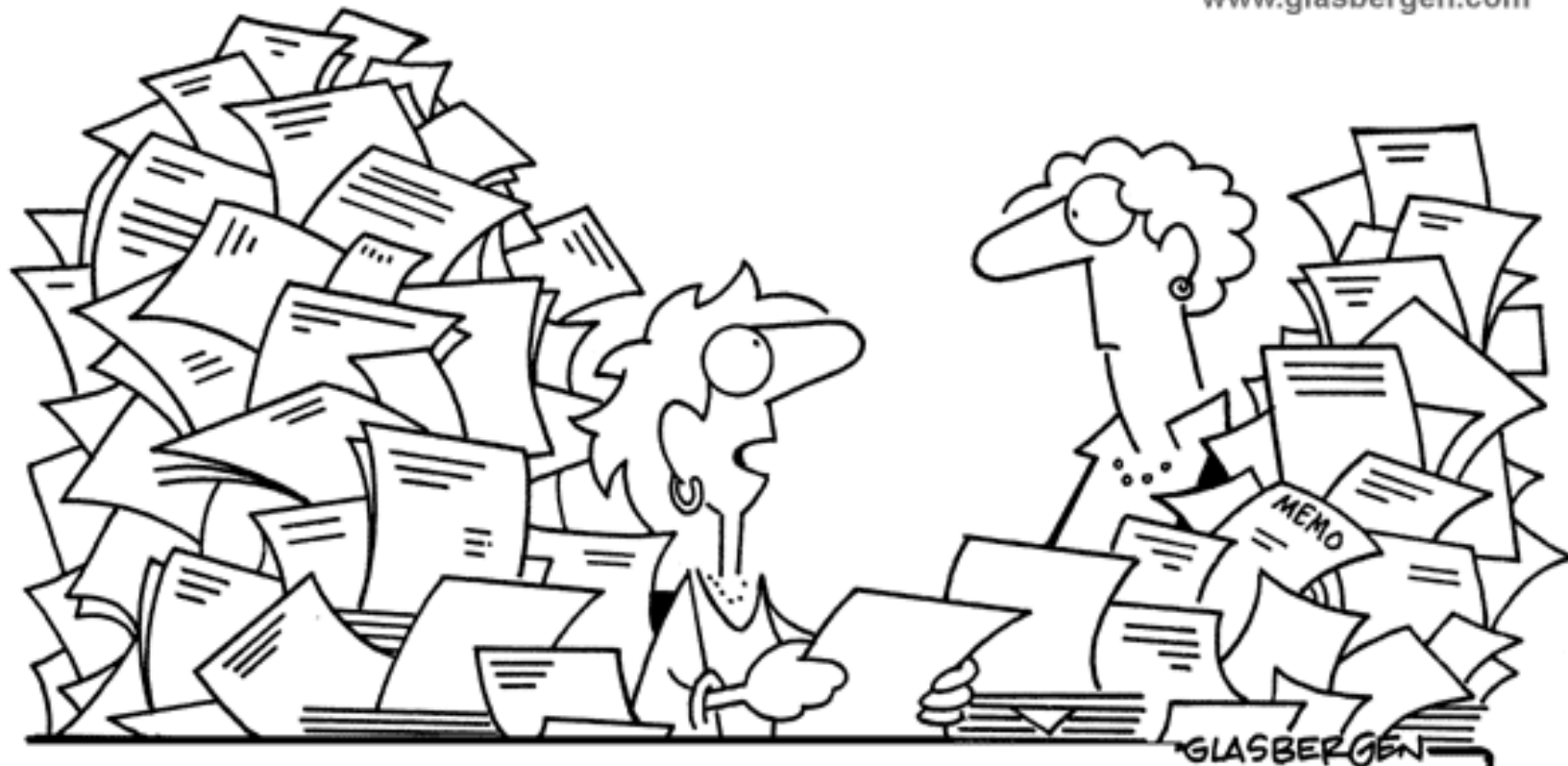


A top-down view of a wooden desk. In the upper right, a white keyboard is partially visible. To its left is a small black pot with green grass-like plants. In the lower right, there is a white coffee cup with dark liquid on a saucer, a black spiral-bound notebook with a white lined page, and a black pen. Two black binder clips are placed on the desk near the center. The text 'FILE MANAGEMENT' is overlaid in large white letters across the middle of the image.

FILE MANAGEMENT

**PAMELA WONG
ZEN N ORGANIZED**

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www.glasbergen.com



**“I am not disorganized — I know *exactly* where everything is!
The newer stuff is on top and the older stuff is on the bottom.”**



ZEN N ORGANIZED
CREATING HARMONY AND BALANCE

FILE MANAGEMENT

DEFINITION:

THE PROCESS AND ACT OF CREATING AN ORGANIZED STRUCTURE IN WHICH YOU STORE INFORMATION FOR EASY RETRIEVAL



ZEN N ORGANIZED
CREATING HARMONY AND BALANCE

FILE MANAGEMENT

MORE ORGANIZED -> LESS WASTED TIME ->
LESS STRESS -> MORE PRODUCTIVE



ZEN N ORGANIZED
CREATING HARMONY AND BALANCE

THE FILES

- ❖ WHO NEEDS ACCESS?
- ❖ WHERE ARE THEY STORED?
- ❖ WHAT IS THE STRUCTURE?
- ❖ HOW ARE THEY NAMED?



FILING STRUCTURE




2021 >	Client A >	Invoices >	2022 01 15 Project A
2022 >	Client B >	Legal Docs >	2022 03 21 Project B
2023 >	Client C >	Projects >	2022 07 28 Project C





Client A >	2021 >	Invoices >	2022 01 15 Project A
Client B >	2022 >	Legal Docs >	2022 03 21 Project B
Client C >	2023 >	Projects >	2022 07 28 Project C





Client A >	Project 1 >	Invoices >	2021 >
Client B >	Project 2 >	Legal Docs >	2022 >
Client C >	Project 3 >	Marketing >	2023 >



FILING STRUCTURE – CONT'D

 Tax related documents >	 EM Notice of Assessment 2021 >
	 EMC Notice of Assessment 2021 >

 Business >	 Tax related documents >	 EMC Notice of Assessment 2021 >
 Personal >		

 Business >	 Tax related documents >	 EM Notice of Assessment 2021 >
 Personal >		




FILE NAMING

- 📁 April 2021
- 📁 August 2021
- 📁 December 2021
- 📁 February 2021
- 📁 January 2021
- 📁 July 2021
- 📁 June 2021
- 📁 March 2021
- 📁 May 2021
- 📁 November 2021
- 📁 October 2021
- 📁 September 2021





- 📁 2021 01
- 📁 2021 02
- 📁 2021 03
- 📁 2021 04
- 📁 2021 05
- 📁 2021 06
- 📁 2021 07
- 📁 2021 08
- 📁 2021 09
- 📁 2021 10
- 📁 2021 11
- 📁 2021 12

FILE NAMING - CONT'D

 2023 02 07 2023-02-01 20230204 2023 02 01 2023 02 04 2023 02 07



FILE NAMING – CONT'D

-  AAA - Marketing presentation template
-  Presentation for ABC - 2022 12 01
-  Presentation for DEF - 2022 12 15
-  ZZZ - Old presentations from 2015



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NEXT STEPS

- ❖ ASSESS AND REVIEW
- ❖ SET STRUCTURE AND NAMING CONVENTIONS
- ❖ START TODAY
- ❖ STAY CONSISTENT
- ❖ STAY ON TOP OF IT



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CREATING HARMONY AND BALANCE

THANK YOU

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