

Filing Instructions

Helpful tips for clearing your desk and uncluttering your office

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1. Alphabetical Files - retrieval likely. Examples: catalogues, directories, references, consequential correspondences. Things you need over and over again. Files for your key customers and vendors, the 20% who account for 80% of your business.

2. Chronological Files - retrieval unlikely. Examples: paid bills, inconsequential correspondences, invoices to and from your incidental customers and vendors, the 80% who account for 20% of your business.

3. Financial Files - to substantiate Assets and Liabilities. Examples: closing papers for your house, bills of sale for fixed assets like vehicles, appliances & furniture; bank and investment account statements; mortgage statements; credit card accounts; unpaid bills.

4. Tickler Files - requiring action at a definite time. 43 files: 12 for each month, and 31 for the current month. Put any document in them that requires action at a definite time. Examples: active client files with whom you have scheduled appointments (this presumes you also maintain a Contact Management database like Outlook, etc. so you can still look up clients alphabetically); information about upcoming conferences, events, appointments, deadlines, projects, etc. Any document that pertains to your schedule.