



General Reference Filing

One of the biggest bottlenecks I've come across working one-on-one with executives in the last few years is their lack of a good instantly-at-hand filing system for reference and support information they want to access when they need it.

More than once my clients and I have stopped the work flow coaching process mid-stream, driven to the local office supply store, and bought a quality filing cabinet, a big stock of file folders, and a Brother auto-labeler with plenty of tape. Just so we could create an appropriate place to put 75% of the "stuff" lying around their desk, credenzas, and floors of their offices

The bottom line: You each need your own personal, at-hand general reference filing system. It should take you less than 60 seconds to pick something up out of your in-basket, or print it from e-mail, decide it has no action but does have potential future value, and finish storing it into a trusted system. If it takes you longer than a minute to complete that action, you won't do it--you'll stack it instead.

If you have a trusted secretary or assistant who maintains that system for you, so you can put a "File as ____" post-it on the document and send it "out" to them, great. But ask yourself if you still have personally interesting or confidential support material that you need accessible at any moment, when they're not around. If so, you'll still need your own system, in your desk or right beside it somewhere.

Create one A-Z alpha filing system, not multiple systems. People have a tendency to want to use their files as a reminder system in addition to reference, and therefore attempt to organize their files by projects or areas of focus. This magnifies geometrically how many places something isn't when you forget where you filed it. One simple alpha system files everything by topic, author, or company so it could only be three or four places (if you forget where it is.) The ultimate filing system files by number with a computerized cross-reference database that tags topics with specific files. If you're not there yet (who is?) come as close as you can by creating a single, simple alpha system. It's also very helpful visually to have alphabet tabs within the files ("A", "B", "C" etc.), so it's a no-brainer to find files and where to put them on the run. It even helps to label the outside of the file drawer ("A-F", "G-M", etc.) for the same reason.

Keep a big, mambo stack of fresh, new, third-cut, 2-ply top file folders instantly at hand from where you sit when you process your in-basket. Have your labeler there as well. If it's even the slightest hassle to label and file something into a new topic folder, you won't do it, in the heat of operational life.

Purge your files once a year. That keeps them from being stale and you from feeling like it's a black hole you're putting things into. It gives you the freedom to keep anything you think you might want or need later.

Do you really need Pendaflex (those files that hang from wire frames)??? They're much less efficient for rapid personal general filing than plain old freestanding files held upright by the metal sliding support in the back of the drawers of most good front-opening filing cabinets. There are only a few people who need to



hang on to thick manuals and other materials that make the wide hanging files useful. Unfortunately most desk file drawers are built for Pendaflex hangers, and many companies have issued side-opening Pendaflex filing cabinets as standard office furnishings. (They're really only good for pulling out the wire and using to store office supplies!)

If you absolutely *have* to use Pendaflex hanging files, I recommend that you put *only one file inside each hanger* and *label the initial file instead of the hanging file*. This makes it much easier to see and find the files, and allows an alpha system to work much easier without fighting with overstuffed hangers. It also allows you to take the file into meetings, keep it temporarily on your desk for work in progress, and generally handle it more easily.

Typeset label your files! I've never seen an exception—anyone who has taken my advice and printed their file labels with a labeler has stuck with it, and seriously upgraded their general reference system. I don't know why it works. I just know it works. Labelers are not cheap (expect to pay \$100) But typeset labels just change the nature of files, way for the better.

We've always found Brother labelers to be the best and easiest to use. Frankly, you don't need anything but the most basic functionality—I recommend the least expensive model that sits on the desk (much easier to use than the handheld ones.) At current writing, the best labeler is the Brother PT-310 (about \$80 at Staples.) Get the AC adapter for it (it just comes initially with batteries.) Get extra black on white tape cassettes—they are the easiest to read, and you can re-use labels over each other.

Never let your file drawers get more than full! Nothing creates resistance to filing worse than overstuffed file drawers. They should always remain comfortably loose enough to get files and materials in and out with ease (and without destroying cuticles!)

Be prepared to need more filing space. If you maintain full cabinets, and discover how easy the above system is in organizing all kinds of potentially useful information, you will likely need more room for your files. Almost without exception, people I work with want more file drawer space. Both purge and archive elsewhere out-of-date material, and/or be ready to buy more cabinets. As a rule of thumb, I would have four file drawers for your personal general reference files.

