



Business - Constructing Efficient Systems - What Types of Filing Systems Would Help You?

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ABOUT THE AUTHOR

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There are several different types of filing systems that can be used in your business to keep things organized and easy to find. Of course, the more paper you use, the more filing cabinets you will need I recommend that you choose a different colour for each filing system. This provides you with a visual reminder of where the file belongs..

Following are some of the systems which I have found are helpful in my private practice:

Client Filing System - We have tried a number of different ways of keeping these but have found that the best is to use letter sized folders with self-sticking fasteners on each side. The file label has three rows. The top row has the client's surname followed by a comma and the first name(s). The second row has a coding system we use that is formed by using the year and month that the client file was opened as well as the number that indicates how many referrals have been received in the year to date.

We use legal-sized vertical files with hanging file folders but file all of the client files alphabetically. The most important thing to remember is that you will receive a number of files over time and therefore need a system that will accommodate and hold them according to professional standards.

Financial Files - As my business has grown significantly I have had to divide the various aspects of the financial accounting into smaller systems. Initially, however, you will need files for Income, Expenses, Assets, Liabilities, Banking, Income Tax and Reports. Again I recommend different coloured folders for each and, if possible, a separate filing drawer to hold them. We also use banker's boxes with the year clearly marked on the outside to hold information from previous years that need to be kept.

Topical Files - Over the years I have collected a great number of wonderful articles and handouts. We have developed a written list of the various file names and sorted these into subject groupings that are filed alphabetically.

Correspondence and General Information - There always seem to be things that you want to keep which don't seem to fit into the above systems. We have one drawer that houses these again in alphabetical order.

Do not get too sophisticated when it comes to a filing system. The idea is to ensure that the things you keep really need to be kept and then can be found easily when needed.

Filing systems can either waste time or save time depending on how they are set up. It is therefore a good idea to plan well before you even begin. That's all part of the adventure of having a business.