

## The Business Times – January 2022

### Inside the Mind of a Professional Organizer - By Jessi Bushman aka “Organizer Jessi” Creating your Annual File System

January is the perfect time to create or improve your filing system – for your business or your personal home office. Depending on the volume of paper files you have, you will need to identify the type of storage solutions to invest in based on your budget and space.

I believe organization can be broken into three stages: **Past, Present & Future.**

**Past** storage generally relates to documents or items that you are required to keep for 7 years. My professional experience has provided exposure to many different methods of storage. Smaller businesses, 1 Banker Box may do the trick, while other industries, may require an off-site warehouse.

I can speak from experience on this situation. I worked for a tax service that found themselves in desperate need of storage. It was an effort but I (with the assistance of several co-workers and trucks) relocated 7 years of tax records to a secure location. Of course, establishing a system for this abundance of documents required a plan. Based on the storage unit dimensions, I created a simple layout of shelving units to accommodate nearly 300 Banker Boxes! Placement of boxes were in year order, making it easier to identify files that could be pulled each year for disposal, making room for current documents. The accessibility was amazing, along with the visual satisfaction to see the plan through.

**Present** storage is the current year. I believe it's worth while to create files specific to the documents you are storing (this relates to electronic files as well.)

This process is an investment of time, but will ultimately provide ease when it comes to filing and retrieving documents.

I worked for a manufacturing company that received a large quantity of packing slips and invoices. Within my first week, I realized there was not a filing system in place, only the “method” of piles in drawers. This was a huge obstacle to overcome as numerous employees needed to reference back to these documents frequently. I observed one employee looking for a specific packing slip; 20 minutes later, it was not located. At that moment, I knew I needed to improve the situation.

The process of creating a system specific to this industry took roughly 1 month to establish. I worked on sorting out “**Past & Present**” during a specific block of time each week since I had other tasks to perform. This is a perfect example of Time Management; understanding where I could utilize down-time to complete this task on top of my normal work-load.

I will confirm, IT WAS WORTH IT!!! The first time a co-worker was looking for a packing slip, I led the way to the new, clearly labeled file cabinets. We opened the correct drawer, found the specific vendor file and retrieved the needed document with seconds. This

attention to detail also came in hand during internal audit time. Locating documents for the auditors took minutes to produce. Lastly, at the end of each year, I was able to pull records, in alphabetical order and box up for long term storage. Something to consider would be creating a list of what files are in what box. This comes in hand if you are working with a 3<sup>rd</sup> Party storage company. They pull your requested boxes, so being more specific could be a huge time saver for both parties.

**Future** storage is just that! Monitor your “**Present**” file volume to accommodate your storage needs. There are many factors to consider when you are thinking ahead.

1. Has your business expanded or downsized?
2. Have you transitioned to electronic file storage?
3. Is your office relocating in the near future?
4. Is your storage easily accessible?

Like all systems, it takes time to implement. Identifying what you need to organize is the first step. How you access your storage and knowing your needs will change is next. Taking action and creating your personalized storage is the icing on the cake!

I enjoyed sharing **Tips to establish and maintain an organized workspace.**  
**Check back for ongoing ideas and suggestions!**

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