

General Reference Filing

— by David Allen

Please note that the following article includes some suggestions that are applicable to a front loading file cabinet with a slider block to support the files to stand up. If your environment dictates another kind of filing cabinet, we encourage you to follow the universal guidelines that apply to all reference materials.

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 workflow coaching process mid-stream, driven to the local office supply store, and bought a quality filing cabinet, a big stock of file folders, and 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-tray, or print it from email, 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 administrative or personal assistant who maintains that system for you, so you can put a “File as ____” sticky note on the document and send it “out” to him/her, great. But ask yourself if you still have personally interesting or confidential support material that you need accessible at any moment, when your trusted assistant is 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 for general reference, 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 (or at least as few places as you can get by with) 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. Some exceptions to more than one alpha system can work for very specific groups of files that warrant their own area, such as personnel, financial information, or current projects.

Keep a big stack of fresh, new, third-cut, 2-ply top file folders instantly at hand from where you sit when you process your in-tray. 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 hanging file folders (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 hanging files, and many companies have issued side-opening 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 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 better 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 effectively.

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 at least \$50), but typeset labels just change the nature of files, for the better. There are less expensive models, but you will sacrifice speed and quality.

We have found Brother labelers to be the best and easiest to use, however, we encourage you to research what will work best for you. Frankly, you don't need anything but the most basic functionality—I recommend the least-expensive, but good quality model that sits on the desk (much easier to use than the handheld ones.) Get extra black-on-white tape cassettes—they are the easiest to read, and you can reuse labels over each other.

Never let your file drawers get more than 3/4 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.



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