

FILE ORGANIZATION *checklist*



Shared Drives



One Drive – Sharepoint



Google Drive



Cloud options: Nextcloud, Egnyte, Citrix,
Dropbox Business

How to Organize



Base it on the work you do



How your team works



Things you do year over year



Things that are one-offs



Consider organizing by type, project, date, client,
resource, department etc.

Main Business Folders



ADMINISTRATIVE

(Templates, strategic plans, agendas, meeting minutes, Systems and Processes, business licensing, finance: Invoice, taxes)



EVERGREEN

things that move over each year (strategic plans, brand assets)



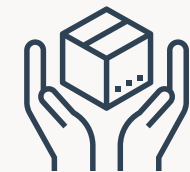
ARCHIVE

Folder for things no longer using. I don't organize this folder in anyway since it's all archived items and I can search the folder if I need something.



CLIENTS

I have a folder for each client and under that I have folders organizing the resources and projects I do for them.

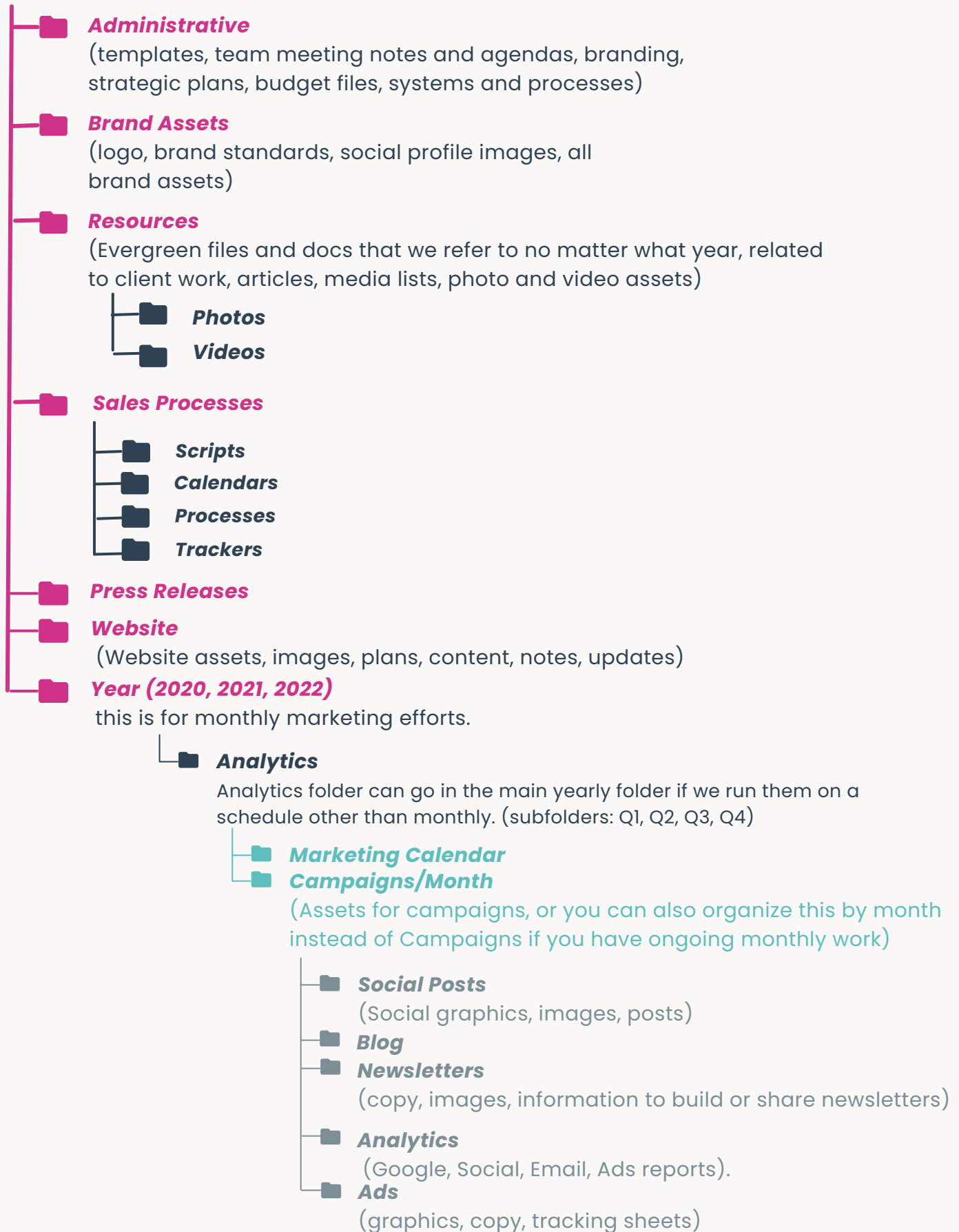


PRODUCTS

This folder I use to organize any products I create whether digital products or services I offer. Any resources for creating, revising, initial promotion of these live here along with the final product.

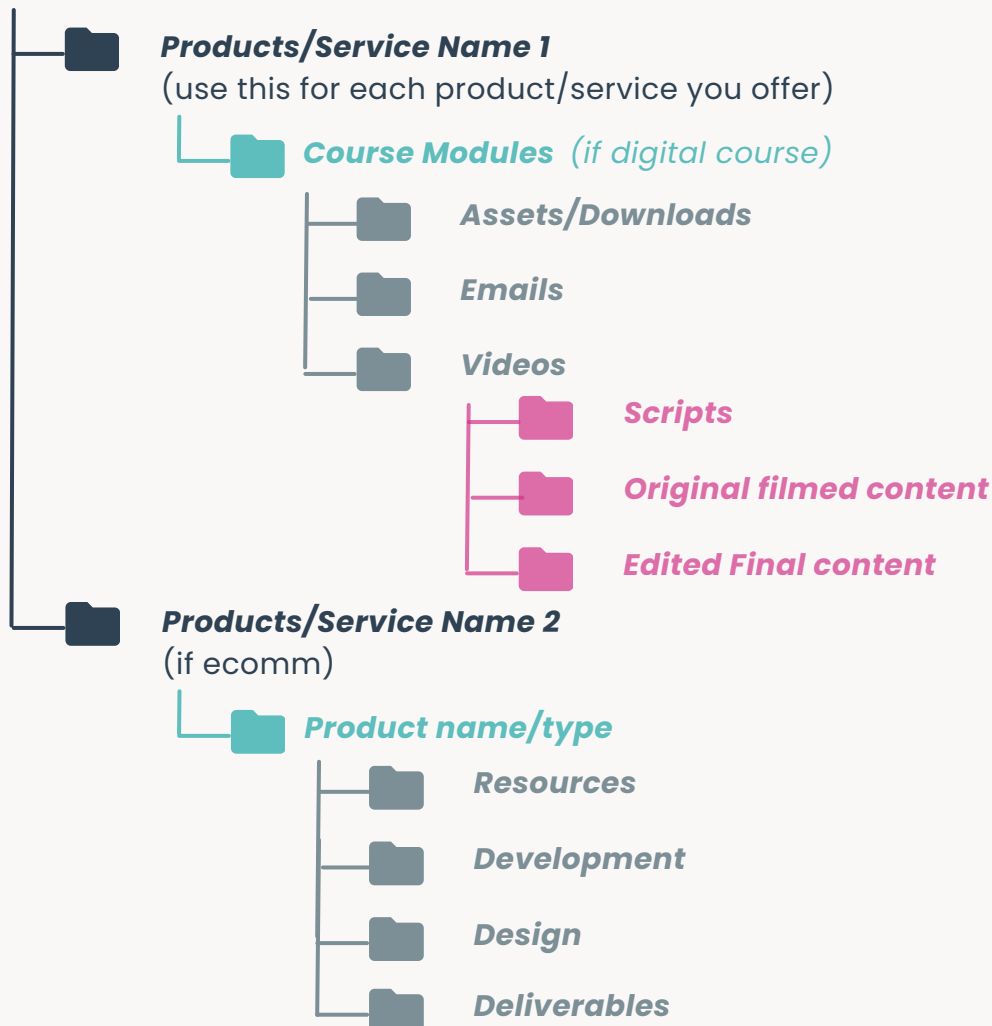
Organize by Department

MARKETING+SALES



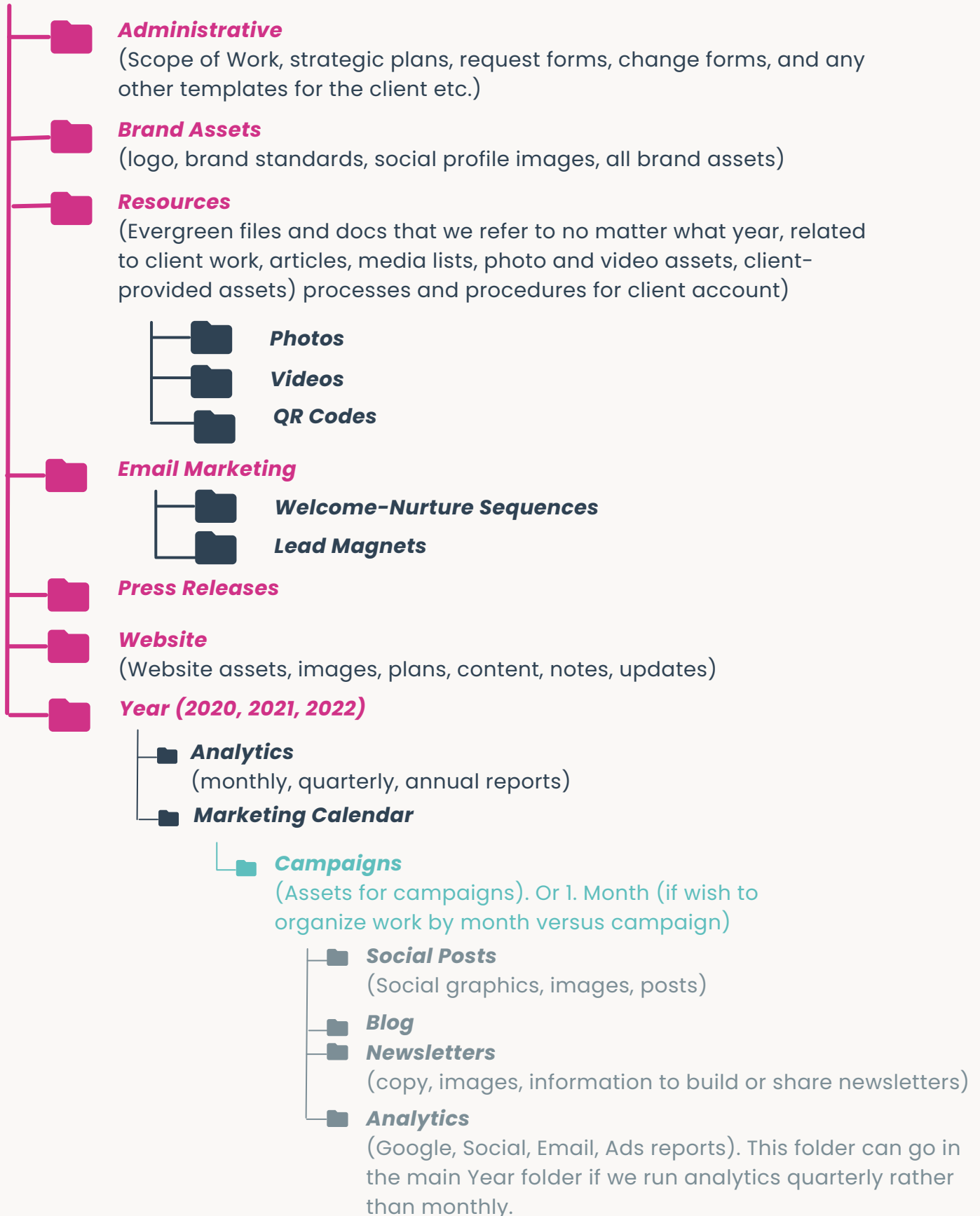
Organize by Products/Services

PRODUCTS/SERVICES



Organize by Client

CLIENT NAME



Usage Procedures

ARCHIVE

(optional file – we are not using this stuff but don't want to delete it)

FILES

Do not duplicate files and copy them into multiple places otherwise we lose version control.

FOLDERS

Files should go into folders as much as possible, ensure the folder has a name that makes sense, and check that the file can't fall under another existing folder. Think of folders as categories – they help explain what things are simply.

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NOT SURE WHERE SOMETHING SHOULD BE FILED?

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Work With SMS!

Whenever you're ready, here are 2 ways I can help you:

1. Check out the **B2B Content Creation System** for small team marketers. This is the content ecosystem I have developed and used over the past decade. As the digital landscape shifts, so does this system—keeping you ahead in content mastery and digital marketing success.
2. **1:1 Strategy Session** to get you unstuck. Whether you need help with the campaign or tech strategy, help with set up or help with marketing team workflow – pick a time to work through it with me.

Amanda Long
SmartMarketingSquad.com



Follow Along!

