Reference Files: Finding What You Need, When You Need It!

You may have heard the term “desk reference files” before, but what does it mean? Desk reference files contain documents that don’t require immediate action, but that you do need to access regularly for reference purposes. Your desk reference files could include:

- client files
- financial records
- phone lists
- marketing resources
- product cheat sheets
- anything else you need to have access to often

The one thing each piece of paper in your desk reference file has in common is that you have to be able to find it quickly on demand.

Why Most Desk Reference Filing Systems Don’t Work

The trick to developing a workable desk reference file is choosing categories that make it easy to:

- know where to put a piece of paper
- know where to find it again

The problem is that most people focus entirely on the “where to put it” side of things. They don’t envision the day when they will need to retrieve that file. When they go hunting for a specific document, their mind is thinking differently than on the day they filed it – so they can’t remember what they labeled the folder. Chaos!

Creating Desk Reference File Categories

As you are deciding on a category for a piece of paper, there are a few rules to follow that will allow you to locate that

file easily again in the future:

1. Pick a category that is broad enough to encompass more than just a couple of pieces of paper. It's quicker and easier to search through a few thicker folders whose contents are all related, than a dozen different "onesie and twosie" files which have nothing in common with each other.
2. Think about where you would LOOK for that piece of paper when you need it again. This will help you create a logical file label that makes sense to you both now and down the road.
3. Start your labels with a category that can be applied to a group of folders, and then attach the subcategory (see example below)

Before: Your folders are labeled "electric", "water", "gas", and "phone"

After: You label folders "utilities: electric", "utilities: water", "utilities: gas", "utilities: phone"

If you organize your folders alphabetically, all the utilities are grouped together and therefore easier to find when you need them.

4. Choose one type of filing system and stick with it – it doesn't matter if you file chronologically, alphabetically, or another way – just be consistent and do it the same way, all the time, throughout your entire system.
5. When your files get overstuffed, it's time to divide that category out into a couple of smaller subcategories if your "client file: Marjory Jones" folder is now way too big, you can break it out chronologically

("client file: Marjory Jones 2013", "client file: Marjory Jones 2014")

or

("client file: Marjory Jones communication", "client file: Marjory Jones contracts", etc.)

This manages to keep documents all together while you have fewer pages per folder.

These are some very simple, yet effective steps for developing a desktop reference filing system that will take most of the work out of filing – and retrieving – your important documents. Many of these techniques you can even take beyond your desktop reference filing system and use with your other files.

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