

Portable Filing: Organizing without an Office



Always Be Prepared

For those “road warriors” who spend little time behind a desk, organization is a unique challenge. They need an organized, portable system to be fully prepared for any situation.

Portable Filing

To put together a system that works for you, here are some things to consider. Use portable file boxes, project totes, or file chests sized to house your activity for a typical week’s worth of client calls. Consider the size and volume of frequently needed reference materials as you choose the size and style of your portable file. Make sure the file boxes are sturdy and will travel without tipping or becoming damaged. To keep papers organized inside the storage box, use hanging folders, file folders, jackets and pockets. If you need to keep correspondence secure and sequential, use fastener folders and classification folders. Use color to help you recognize categories or subjects at a glance.

File Maintenance

Just like your vehicle, a good filing system requires regular maintenance. The best way to keep it in tip-top condition is to quickly troubleshoot your system at the end of each day. Make sure you have enough literature or pricing information. At the end of the week, do a thorough visual review to make sure you have taken care of any client commitments, delivered the samples, and followed up on any leads. Plan for next week’s activity by reviewing your client call roster, setting up the appropriate appointments and pulling all the client files, literature and samples that will be required.

Avoid Major Breakdowns





KEEPING YOU ORGANIZED



An effective portable organizational system will make your life easier and your day more productive. Preventive planning and regular maintenance is the key to keeping your system in tiptop shape and running smooth.

