

Folder Management Briefing

This guide is designed to help you spot tasks that can be handed over to a VA, what Jessanol would usually need from you, and what the end result could look like.

HOW THIS HELPS

Shared folders can become messy very quickly.

At first, everyone knows where things are. Then a few versions, downloads, screenshots, client folders and “final final” documents appear, and suddenly finding the right file becomes a job in itself.

Jessanol can help organise digital files and folders so documents are easier to find, use and maintain.

THIS IS USEFUL IF

This type of support may be useful if:

-  Your shared drive has become difficult to navigate
-  Files are saved in several places
-  You are not sure which version is the current one
-  Folder names made sense at the time but not anymore
-  You have duplicate, old or unclear files
-  New team members or freelancers struggle to find what they need
-  You want a clearer structure before handing work over

WHAT JESSANOL CAN SUPPORT WITH

Jessanol can help organise digital files and folders in SharePoint, Google Drive or another agreed file storage system.

This may include:

- Reviewing existing folder structures
- Creating clearer folders and subfolders
- Moving files into agreed locations
- Renaming files for consistency
- Archiving old or duplicate files
- Creating a simple folder map or guidance note
- Checking access permissions where needed
- Flagging unclear, duplicated or sensitive files

RECOMMENDED RHYTHM

This can be done monthly, quarterly or as part of a specific tidy-up project.

For example:

- A one-off folder tidy-up or regular folder management
- A quarterly file review
- A folder structure created for a new project, client or employee

ACCESS LIKELY NEEDED

Jessanol will probably need:

- Access to SharePoint, Google Drive or the agreed file storage system
- Guidance on folder permissions and access levels
- Any existing naming conventions
- Details of which folders are active, old or archived
- Guidance on what must not be moved, renamed or deleted
- Details of who uses the folders and what they need to find

IMPORTANT CONSIDERATIONS

Before starting, we will agree:

- What should be reviewed
- What can be moved or renamed
- What should be archived
- What should not be touched
- Whether anything can be deleted, or whether deletion is off limits
- Who needs access to which folders
- Whether a folder guide would be useful

Files should not be deleted unless there is a clear agreement in place. Confidentiality and access permissions should be maintained throughout. The folder structure should be clear enough to use, not so complicated that it falls apart after two weeks.

STEP-BY-STEP INSTRUCTIONS

1. Review the existing folder structure.
2. Identify duplicated, outdated, unclear or poorly named folders.
3. Agree a simple folder structure.
4. Create or update folders as agreed.
5. Move files into the correct locations.
6. Rename files where needed using the agreed naming approach.
7. Flag anything that appears duplicated, sensitive or unclear.
8. Archive old material where agreed.
9. Create a brief folder guide if useful.

WHAT YOU NEED TO PROVIDE

To get started, you will usually need to provide:

- Access to the relevant folders or drive
- A short explanation of how the folders are currently used
- Details of who needs access
- Any naming conventions you already use
- Examples of files or folders that are especially important
- Guidance on what should not be moved, renamed or archived
- Agreement on whether deletion is allowed or not

You do not need to tidy the folders before asking for support. That would rather defeat the point.

WHAT YOU'LL GET BACK

You should have:

- A clearer folder structure
- Easier-to-find documents
- Less duplication and confusion
- A more consistent approach to file naming
- Better visibility of old, active and archived material
- A folder setup that is easier for others to use

If this sounds familiar, we can use this as a starting point to work out what support would be most useful. Contact me: jane@jessanol.com