

# Thinking Faster

Ideas, tools and processes to improve personal, workgroup and enterprise productivity and innovation

## ABOUT

### PRODUCTIVITY SURVEY

#### [CLICK HERE!](#)

A five minute anonymous survey to help us understand the challenges to workgroup and personal productivity

#### [Email Me](#)

## WHAT I READ

[Shared Spaces Research & Consulting](#)

[43 Folders](#)

[sociable media // PowerPoint solutions](#)

[The Corner on National Review Online](#)

[Media Guerrilla](#)

[Decker Marketing](#)

[Reforming Project Management Theory and Practice](#)

[Innovation Weblog - Trends, resources, viewpoints from Chuck Frey at InnovationTools](#)

[AgileManagement](#)

[Slacker Manager](#)

## SYNDICATION

[Blogarama](#)



[BlogStreet](#)



[Feedburner](#)



[Subscribe to this blog's feed](#)

[« Management Serenity](#) | [Main](#) | [The unreasonable man](#) »

## Document Management Simplified

I think as a nation (speaking here of the US) we generate more business documents per capita and more garbage per capita than any other country on earth. I'm starting to wonder if there's a correlation between the two. The problem isn't necessarily with the generation aspects. So far it's not with the storage aspects, although I'm sure we're rapidly running out of landfill. No, the one positive about garbage over business documents is that you very rarely have to retrieve and reuse garbage.

What's interesting about this is as business people we are document generation machines. We can generate more documents - presentations, proposals, marketing collateral, email, spreadsheets, etc in less time than ever before. But while we are generating all these documents, we very rarely consider how they will be stored, recalled and/or reused. So it's almost always easier to start from scratch rather than try to find and reuse documents, especially documents created by someone else. We're all about the output, not about the reuse.

Document management to a certain extent has been hijacked by the enterprise software guys. The message is that document management requires enterprise software. Many firms could become much better at document management by developing some methodologies about saving and recalling files, and defining some "metadata" about the files they create. Just by improving how files are stored and where they are stored, developing a consistent and meaningful naming convention, and establishing some metadata rules which provide some guidance about the documents and what they contain, would take many firms a long way toward improving the recall and reuse aspects.

There are some fairly simple, basic questions to ask about a document while it is being created and edited which might help your team find and reuse it later:

1. What's the purpose of this document?

## C A T E G O R Y

[Change](#)

[Collaboration](#)

[Communication](#)

[Information](#)

[In the News](#)

[Knowledge](#)

[Leadership](#)

[Meeting Management](#)

[Personal Productivity](#)

[Process Management](#)

[Teamwork](#)

## R E C E N T

[Locked into it](#)

[Telling Stories](#)

[Teamwork Beyond](#)

[The unreasonable man](#)

[Document Management](#)

[Management](#)

[Opening the](#)

[Quick Wins](#)

[Well, how do you](#)

[Finding Need](#)

## R E C E N T

[Karl Vogel on Document Management Simplified](#)

[austingang on Document Management](#)

[Chris on Locking Documents](#)

[Gar on Telling Stories](#)

[Joshua K on Document Management Simplified](#)

[Adam on Managing Documents](#)

[ian stanley on Document Management](#)

2. Is it likely someone would want to retrieve and reuse all or part of this document?
3. What naming conventions exist to help people retrieve it?
4. What filing system or metadata exists to assist with retrieval?
5. How can we indicate who authored the document for further information?
6. What other keywords or search terms might be applied to this document - project number, client name, geography, time frame, etc?

Next comes the hard part - you knew there was going to be a hard part didn't you? Someone or some team needs to reinforce the naming conventions, filing conventions and metadata conventions so everyone on the team is naming, filing and tagging the files consistently. You see, even the big document management software applications require the same discipline - they just reinforce it in a different way. It's not the software, it's the people, the process and the discipline that will make the difference.

With the wealth of tools like Google Desktop or X1 search engines, Wikis or blog software to help form the "metadata" and pointers to the documents and a little methodology and discipline, any firm should be able to set up a rudimentary document management system in a few days. One of our clients in a CAD environment has a "document management system" which consists of an Access database where the documents are defined and the metadata is captured, and a link to the document is stored. This application works because anyone who does not follow the process is subjected to co-worker derision. They've got the basics - standardized naming conventions, a thoughtful process to determine which documents may need to be retrieved, a metadata capture device, pointers to a standard filing system and a culture which reinforces the discipline.

Total cost? About \$2000. Total value? The certainty they can find a document when they need to retrieve historical documents in seconds with very little effort.

---

September 30, 2005 | [Permalink](#)

## TrackBack

---

TrackBack URL for this entry:

[Haystacks](#)

[Productivity  
Managers - w](#)

[Productivity  
time](#)

[Mark Shead c  
Haystacks](#)

[Add me to yc](#)

Powered by :

X X - C C

[© 2004 Jeffru  
reserved.](#)

<http://www.typepad.com/t/trackback/3281293>

Listed below are links to weblogs that reference [Document Management Simplified](#):

» [Document Management Simplified](#) from lifehack.org  
Related to the last post, I found out Jeffrey Phillips has similar brainstorming post on document organization. He said: But while we are generating all these documents, we very rarely consider how they will be stored, recalled and/or reused.&#x2013; [\[Read More\]](#)

---

Tracked on October 01, 2005 at 11:20 AM

## Comments

---

When a company already has all of their data in digital format, document management systems can be a very expensive way to do something very simple. I think a lot of the value of document management systems comes when they are used to give you a simple way to access all of your documents both those that were created on paper and those that have always been digital.

Part of the problem in many medium to large businesses is the fact that they produce many pieces of documentation that are never going to be used. I think companies would be better off concentrating on creating automated "dashboard" reports from their data than having people create reams of manual reports all the time.

---

Posted by: [Mark Shead](#) | [October 02, 2005 at 10:37 AM](#)

I've started scanning every paper that I think I might need to refer to in the future. I then burn it onto DVD-RW. As I get a ton of paperwork, and have to manage it for my wife as well, naming of course became an issue. I use the following format: Sender [or purpose] - INITIALS [if person specific] - Date - any further keywords.

For example:

Oil Change - 2005-10-06 - Valvoline

If it's something like a credit report, it's :

Experian - JOK - 2005-10-06 - The Associates Removed

This way I can search based on initials, date, who it's from,

or what it's related to [associates, remove, etc]

Yes, it makes the document names large, but as far as finding it and identifying the contents, there's no questions. My wife who uses the documents less frequently, can easily search for our dog's name and print out a copy of the most recent shot records before we take it to the vet.

---

Posted by: [Joshua K](#) | [October 06, 2005 at 05:51 PM](#)

I've tried many different ways to organize my files, and here are some of the things that have worked:

[http://www.dnaco.net/~vogelke/Software/Time\\_Managemer](http://www.dnaco.net/~vogelke/Software/Time_Managemer)

---

Posted by: [Karl Vogel](#) | [October 08, 2005 at 05:47 PM](#)

### Post a comment

---

If you have a TypeKey or TypePad account, please [Sign In](#)

Name:

Email Address:

URL:

Remember personal info?

Comments:

Preview

Post