



OPERATION VERVE

# FILING CHART

PLANNING THE STRUCTURE TO MANAGE  
YOUR BUSINESS FILES IN THE CLOUD

## JOIN OUR FANS

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*"Great to have a knowledgeable consultant guide us through setting up Sharepoint file structures for our quickly growing company. An investment to get some external smarts in at the ground level for a task that SEEMS like anyone can do it using common sense...until you try to do it yourself!"*

**Michael Janssen,**  
**Glady & Co**



*"Kerry Anne cares deeply about your freedom as a business owner. Her systems, processes and steps to success work because she is passionate about each business and works with you first in mind. Can't recommend her services enough."*

**Amy Revell,**  
**Simply Organised**

## BUSINESS FILING CHART

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Modern business is marked by uncertain conditions, rapid change, and unpredictable outcomes. Forward-thinking business owners establish stability and continuity by moving operations to the cloud. It's the perfect start to clear the way for progress even when the goalposts seem to be in continuous motion.

There are plenty of reasons to make the move to the cloud. You might be setting up for your staff to work from home, or decentralizing operations to increase the agility and responsiveness of your business. You might want more control and transparency in your organization, or you might be systemizing to delegate more effectively.

Whatever unique reason your business has for revamping the way you operate, one thing is certain: The essential first step in successfully moving to a cloud-based business is setting up the right structure for you.

An effective filing system provides the operational infrastructure your business needs. A clear, well-organized workspace maintains the productivity, efficiency, and confidence of your team, no matter where they're working from.

This simple chart will make your cloud-based business work for you. Use it to build your own filing system, or pass the plans we make back to your IT consultant to let them do the heavy lifting for you.

See you in the cloud!



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*"Kerry Anne has a profound desire to get businesses organised. I planned the structures required to upgrade my business online. Her passion shines through in everything she shares."*

**Sandy Simmons**  
**Simply Better Health**

## CONTACT

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## SATISFACTION GUARANTEED

You will leave the session with a chart that maps out exactly how your cloud filing system will be set up, including folders, subfolders and access - or you will get your money back, no questions asked

## HOW DOES IT WORK?

- We schedule the Filing Chart sessions in Zoom
- We work together to map out how your filing space needs to be structured
- We chart how main folders will be broken down into subfolders, and how to best categorize all your files
- We plan how access will be managed by your staff so they can easily get what they need without being overwhelmed by files they don't need
- If you are working with a web developer or IT consultant, we finalize the chart with them to ensure they have everything they need to build your new system

## WHAT DO YOU GET?

### Your Filing Chart Session Includes:

- 2 x 3 hour sessions of personalised 1:1 consulting in Zoom
- Map out your cloud-based filing system with a qualified, experienced consultant
- Work on your own or with your team in the sessions
- Do-It-Now action steps to set up your filing space
- Zoom session recordings for your review
- PDF filing chart for your own implementation
- 30 min follow up call to support implementation

## NEXT STEPS

### Let's organise your business filing

<https://keap.app/booking/kerryannenelson/30-min-zoom-call>