

How to Organize and Maintain Files and Records

Develop a system to file everything
easily and find it again ... *FAST!*

If you, your department — even your entire organization — could use a filing system overhaul, this seminar is one you should absolutely plan on attending. From learning the latest legal record-keeping issues ... to implementing an effective department- or organization-wide filing system ... to knowing when to use physical or electronic filing ... to creating and maintaining your own personal no-fail filing routine, this seminar covers it all — and then some.



Call

1-800-556-2998



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**Fred Pryor Seminars
P.O. Box 219468
Kansas City, MO 64121-9468**

Do any of these questions hit home for you?

- Is your computer desktop cluttered with individual files, documents, and folders? Do you have to run “find file” every time you need to locate an electronic document?
- Do people “raid” your files when you’re not available to retrieve something for them, then forget to return what they’ve borrowed?
- Are you confused about the legal ramifications of periodically “purging” your files ... so you end up keeping EVERYTHING?
- Are you responsible for filing and retrieving documents that are critical to the successful operation of your department or organization?
- Have you ever tried to reorganize your company’s filing system before, only to give up in discouragement at the enormity of the job?
- Do you prefer to keep files, paperwork, articles, and other important information piled in plain sight on your desk, afraid that if you file your information away, you’ll never find it again?
- Are you responsible for organizing and filing sensitive information such as legal documents, patient records, “confidential” data, or personnel files?

If the answer’s **YES** (to two, three — even all seven!), then this seminar is tailor-made for you. You’ll come away with the real-world skills, proven techniques, and practical tools it takes to assess your needs, implement a new system from scratch if necessary, and train others on the policies, procedures, and maintenance of your new filing system.

You’ll discover a wealth of ideas for getting your personal filing issues under control as well, from clutter-busting your desktop to finding a permanent, accessible home for all that paperwork. We’ll also walk you through the ins and outs of electronic filing, help you create order out of the chaos of your computer desktop, and examine the latest developments in electronic record-keeping requirements.

Simplify, streamline, and re-organize your filing system — once and for all!

The ability to store and retrieve information is vital for efficiency and continued high performance in the workplace. If you are unable to quickly access information — from other departments or your own desk — valuable time and energy may be wasted as you search for documents and attempt to duplicate lost work.

Haphazard filing leads to a general sense of disorganization that begins to chronically “infect” the infrastructure of the workplace, and the “trickle-down effect” hampers workers at every level from performing at their peak.

With the advent of electronic communication and the proliferation of critical information flowing into organizations from a variety of sources, an effective, accessible filing system is not just “nice to have” — it’s critical!

In this powerful seminar, you’ll discover the latest tools, equipment, and techniques professionals at top organizations use to handle their filing and record-keeping needs, keep on top of storage issues, and deal with a variety of information management crises calmly and swiftly.

Filing doesn’t *have* to be an exercise in frustration ...

In just one fast-paced day, you’ll discover how to assess your filing needs, choose and implement the best processes for your company, and make sure that everyone — from support staff to the CEO of your company — follows your directions on filing and record-keeping to the letter.

We’ll focus on workable solutions you can use right away, organizational shortcuts that will save you time and effort, and techniques to help you conquer procrastination and disorganization — in yourself, your co-workers — even your boss!

You'll learn how to set up a "from scratch" filing system with a minimum amount of stress and transition ... discover tools for limiting access to sensitive, confidential information (financial data, personnel files, tax documents, legal material) ... master techniques for creating an effective electronic filing and storage system ... and gain a variety of other insights, ideas, and proven methods for developing and implementing a smoothly operating, finely tuned filing system that supports your organization's needs (and yours as well!)

This is training that makes a difference — as soon as you return to your workplace

At Fred Pryor, our seminars are based on thousands of hours of practical research, "been there" experience, and proven techniques that are working right now in organizations just like yours. Our trainers have years of experience in the topics they teach, and they have honed their skills in today's top private and public sector organizations. They teach not because they have to, but because they love sharing their knowledge with others and helping corporations improve, one individual at a time.

Every one of our training seminars is a dynamic, results-focused program based on the latest research into how adults learn and retain information. Our programs are a high-energy blend of activities, assessments, back-and-forth discussion, hands-on exercises, and much more — giving you a one-of-a-kind learning experience that sticks with you long after you've returned to the office.

Organized people are naturally more efficient, more effective, and more productive. As a result, they earn respect and responsibilities, are promoted more readily, and enjoy greater opportunities for career advancement.

Take advantage of this exciting opportunity to boost *your* career — Call **1-800-556-2998** or visit our Web site at **www.pryor.com**

Spend just one intensive, fast-paced day with us, and you'll discover how to ...

- Select the most effective filing system (Alpha? Numerical? Chronological? Subject? A combination?) for your needs
- Set up a successful cross-referencing system — you'll find the results well worth the effort!
- Reduce incidences of lost, misplaced, even stolen files
- Keep one step ahead of your daily deluge of e-mail messages
- Dispose of electronic records properly ("delete" doesn't always mean "gone for good")
- Determine what to shred, what to toss, what to keep (and for how long)
- Access important files, data articles, and other information instantly — no more frantically searching your desk, office, and hard drive!

Guaranteed Results!

All of our seminars are **100% SATISFACTION GUARANTEED!** We're confident that this seminar will help you develop a system to file everything easily. If for any reason you are dissatisfied, send us a letter (Attn: Customer Relations) within 30 days of your seminar attendance stating the reason you were not satisfied, and we'll arrange for you to attend another one of our seminars or receive a full refund — *hassle-free.*

How to Organize and Maintain

Seminar Overview

File and Records System Assessment — Where Are the Weak Links? Strengths? What Absolutely *Must* Change?

- Learn to conduct a filing system audit and find out exactly where your methods are lacking
- What are your organization's filing goals and objectives? How do they dovetail with your own goals? Your boss's?
- Perform a system-wide inventory to discover exactly what you've got, what can be archived, what can be recycled, and what needs to be immediately accessible
- Mission-critical information — Classify your files as Active, Inactive, Vital, and Nonessential
- The practicalities of purging — Learn how to set up a systematic purging cycle and get a handle on file overload
- Discover easy recycling ideas to make sure your paperwork ends up in the proper receptacles
- How long must you legally keep files before recycling or destroying them?

Electronic Records Management — Keep Your Electronic Information Under Control

- How to set up a desktop system that keeps your electronic files organized and easily accessible — no more searching for that elusive computer file!
- The surprising truth about e-mail privacy and confidentiality
- “You’ve got mail” — tips for keeping abreast of your daily deluge of e-mail messages
- Failsafe back-up procedures for protecting crucial computer records
- Discover the latest information on the government's electronic record-keeping requirements
- How to coordinate with your IT department to better manage the retention of e-mail and other electronic data

Put a New Records Management System into Practice

- Different types of filing systems — how to determine which one's right for you and your organization
- File retrieval basics — a quick refresher before moving on

- Learn to set up a foolproof cross-referencing system using either the cross-listing or indexing method
- Explore different types of filing equipment, and examine the pros and cons of each
- Tips for increasing time and space efficiency through the location of your files
- Storing awkward, bulky items — smart ideas to get them out of the way, yet maintain their accessibility
- When to set up temporary files, permanent archives, and limited-access storage facilities
- How to create a file index and records manual, so others will have no problem using your system correctly
- Techniques for getting your co-workers to “buy in” to your new system, even if they're reluctant to give it a try at first

Troubleshoot Filing Blunders, Slip-ups and Mishaps *Before* They Become Big Issues

- Those “priceless” original documents — how to ensure they remain safe and secure when copies just won't do
- “Unbloat” your system — “immediate discard” techniques to prevent mountains of documents from clogging your files

n Files and Records

- Conduct your own mini training sessions — Make sure those with access to your files know how to use them
- When filing threatens to overwhelm — quick tips to keep on top of paperwork

Maintain File Safety and Security

- Who has access to your files and who doesn't? Set up processes and controls to keep uninvited guests at bay
- How to make sure confidential files and sensitive material don't fall into the wrong hands
- What legal records must you keep at your fingertips? Which can be destroyed, and which must be archived?
- When files "walk off" — tips and tricks for tracking them down and getting them back quickly
- How to develop a file checkout system that ensures files are back in place when you need them
- Create a back-up plan that will protect critical information from natural disasters
- How to communicate and coordinate your security needs to your IT staff.

Pump Up Your Own Personal Organizational Skills

- Set up a tickler file — and you won't ever have to worry about anything important "slipping through the cracks"
- Tricks for tackling "read-me-now" memos, letters, e-mails, and other messages, when time is short and the pressure's on
- How to use color coding to put important files instantly at your fingertips
- Learn practical techniques for swiftly turning those piles on your desk, table, and credenza into neat, orderly files
- Paralyzed by indecision? Here's how to file and toss in record time
- Are you keeping and filing "just in case" information — data you don't need and will never use? Here's how to tell what's file-worthy and what's not
- Space-saving ideas to make the most of cramped cubes, tiny offices, limited work space, and small hard drives

Is this seminar for you?

YES, if you are frustrated with the antiquated, impossible-to-use filing system in your department or organization

YES, if you feel your work suffers because you are not as organized as you'd like to be

YES, if you have been asked to update and streamline your department's filing and record-keeping systems — and you don't know where to start

YES, if you're looking for the best ways to store and retrieve vast amounts of electronic data — securely, easily, and economically

YES, if you are the "gatekeeper" for mission-critical information that absolutely must not be lost or misplaced

Seats are guaranteed to fill fast! *How to Organize and Maintain Files and Records* will be in your area for a limited time only. Don't miss your chance to attend! You'll quickly master practical filing and record-keeping techniques, discover fresh ideas and "ahas" for streamlining and restructuring your current system, and learn how to build a brand new records management system from the ground up if your situation calls for it.

**Call now to reserve your seat!
1-800-556-2998**

Give us just one day ... and we'll give you a whole new outlook on filing, organizing, and managing the constant flow of information coming your way.

Learn to develop a filing and record-keeping system that's tops in efficiency, effectiveness, and accessibility

What's wrong with your current filing system?

Have you ever wondered *why* your filing system is so inefficient? Where breakdowns happen? Why mishaps keep occurring? You'll take an in-depth look at where the gaps are in your current system, define goals and objectives (both yours and your organization's), and examine your options — from overhauling the entire system to a partial reworking of it.

- Where are the weak links in your system? Learn to identify them and take steps needed to strengthen them
- What goals do you and your people wish to accomplish through your filing system? Better accessibility, tighter security, faster filing, a system for keeping records under control, or all of the above?
- 4 ways to classify your files and get your documents under control — Active, Inactive, Vital, and Nonessential
- How to determine which files are critical to you and/or your organization's daily, weekly, monthly, and yearly operations
- Discover how a retention/recycle schedule will keep your files from ballooning out of control

What does your ideal filing system "look like"?

All filing systems are not created equal. Every person likes to organize things a little differently, and every organization has slightly different needs. Your trainer will help you analyze your present system, give you an overview of various other effective systems, and help you choose what will best suit you, your department, and your organization.

- Get familiar with 5 super-effective filing methods and 3 "combination" methods
- Refresh your filing memory with these basic file-retrieval tips and techniques
- Learn these cross-referencing techniques for making files twice as accessible and your system even more efficient
- What are your electronic management needs? You'll explore your options, and discover file management and disposal techniques for all your electronic records

Putting a new filing system in place

Once you've chosen the system that will work best for you, it's time to put your ideas into action. Discover how to select appropriate storage equipment, supplies, and other filing materials to make maximum use of the space you've got.

- Choose the right filing equipment and select the best location for your files
- How to select the most efficient electronic storage methods
- The best ways to store large, bulky items, while keeping them accessible if needed
- Get others to "buy in" to the proper use of your system — whether they're peers, higher-ups, or executive-level management
- Create a file index and records management "how-to" manual so others know exactly how to access your system

Maintaining your system over time

The trouble with many filing systems is that they're too time-consuming, difficult, or complex to actually use over the long term. People may have the best intentions, but as time goes on, important documents become misplaced, files aren't purged regularly, filing tasks pile up, and pretty soon, the system is in complete disarray. This seminar simplifies the filing process and offers techniques and ideas for keeping your system continuously on track.

- Create a file-checkout system so you always know who's responsible for returning file materials
- Minimize filing mishaps — easy tips for training other employees to use your system correctly
- Learn how to maintain file safety and security for confidential materials
- Tips for tracking down and retrieving missing documents (you'll be surprised at how many "missing-in-action" files return to you!)

Plus, discover dozens of no-fail strategies and great ideas for organizing your personal work space, developing positive new habits, and managing your time and workload better than ever before!

Attention, Managers and Supervisors ...

Do some people in your organization have their own "creative" filing systems (perfect for them, utter chaos for everyone else)? Are some departments and people super-organized, while others are floundering helplessly in a sea of paper and electronic data? Do you want to make sure your record-keeping practices are uniform throughout your organization, and meet the latest legal standards? Are you concerned about the amount of time your people spend looking for paper or electronic documents that are misplaced, lost, or misfiled?

If your goal is to get everyone in your department or organization on the same page when it comes to filing and record-keeping, consider an on-site presentation of *How to Organize and Maintain Files and Records*. When we bring a topic like this to you, we can adapt it to meet your organization's needs and address those issues that are most important to you. We can tailor program content to your specific industry, or spend extra time where your people need it most.

Registration Information

Enroll Today! Hurry, our seats fill *fast*. Guarantee your enrollment and pay your enrollment fee today! A confirmation will be e-mailed, faxed, or mailed to you once your registration is completed. Please make your preference known at time of registration. **Payment is due before the program.**

Express Seminar Enrollment! Please be sure to provide us with your e-mail address or fax number and check the Express Seminar Enrollment box on the registration form. You will receive your e-mailed or faxed confirmation within 48 hours of our receiving your e-mailed, faxed, or mailed registration form.

Program Schedule

Check-in: 8:30 a.m. – 9:00 a.m.
Program: 9:00 a.m. – 4:00 p.m.

Cancellations/Substitutions

You may cancel your registration up to 10 business days before the program. Your registration fee will be refunded less a cancellation fee. If you need to cancel less than 10 business days prior to the program you may 1) send a substitute from your organization or 2) transfer your registration

fee to another program of your choice that is scheduled within 12 months of your original event. Please note that if you don't cancel and don't attend, you are still responsible for payment. Substitutions may be made at any time.

Please Note

- We will e-mail, fax, or mail your confirmation to you once your registration is completed.
- You will be notified by e-mail, fax, and/or mail if any changes are made to your scheduled program (i.e., date, venue, city, or cancellation).
- Walk-in registrations will be accepted as space allows.
- Please, no audio or video recording. See your program leader for audio and video program availability.
- Lunch and parking expenses are not included.
- If using a purchase order, please attach it to a completed registration form and mail to us right away.
- You will receive an attractive take-home Certificate of Attendance at the end of the program — great for framing or including in your personnel file.
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For a free consultation, visit us online at www.pryor.com or call us at 1-800-944-8503 today!

Tax-Exempt Organizations

If you are tax-exempt, enter your tax-exempt number in Section 4 on the Registration Form. Please mail or fax a copy of your Tax-Exempt Certificate to us for payment processing. *Thank you.*

Tax Deduction

If the purpose of attending a Fred Pryor seminar is to help you maintain or improve skills relating to employment or business, expenses relating to the program may be tax-deductible according to I.R.C. Reg. 1.162-5. Please consult your tax adviser.

One-Day Seminar

How to Organize and Maintain Files and Records

- Gain hard-hitting ideas, proven techniques, and sophisticated strategies for creating a high-powered, easy-maintenance record-keeping system
- Master state-of-the-art storage solutions for organizing all your electronic data
- Learn to keep important files from "growing legs" and walking off — and stop spending valuable time tracking them down!
- Train others on the finer points of your filing system — make sure everyone's on the same page when it comes to access, retention, and file-purging
- Discover how to keep confidential, sensitive materials safe, secure, and accessible only to those who need to see them
- *And much more! See inside for full program details!*



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Yes!

I want my filing system to be more productive, efficient, and effective.

ID#
910935

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METHOD OF PAYMENT

4

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