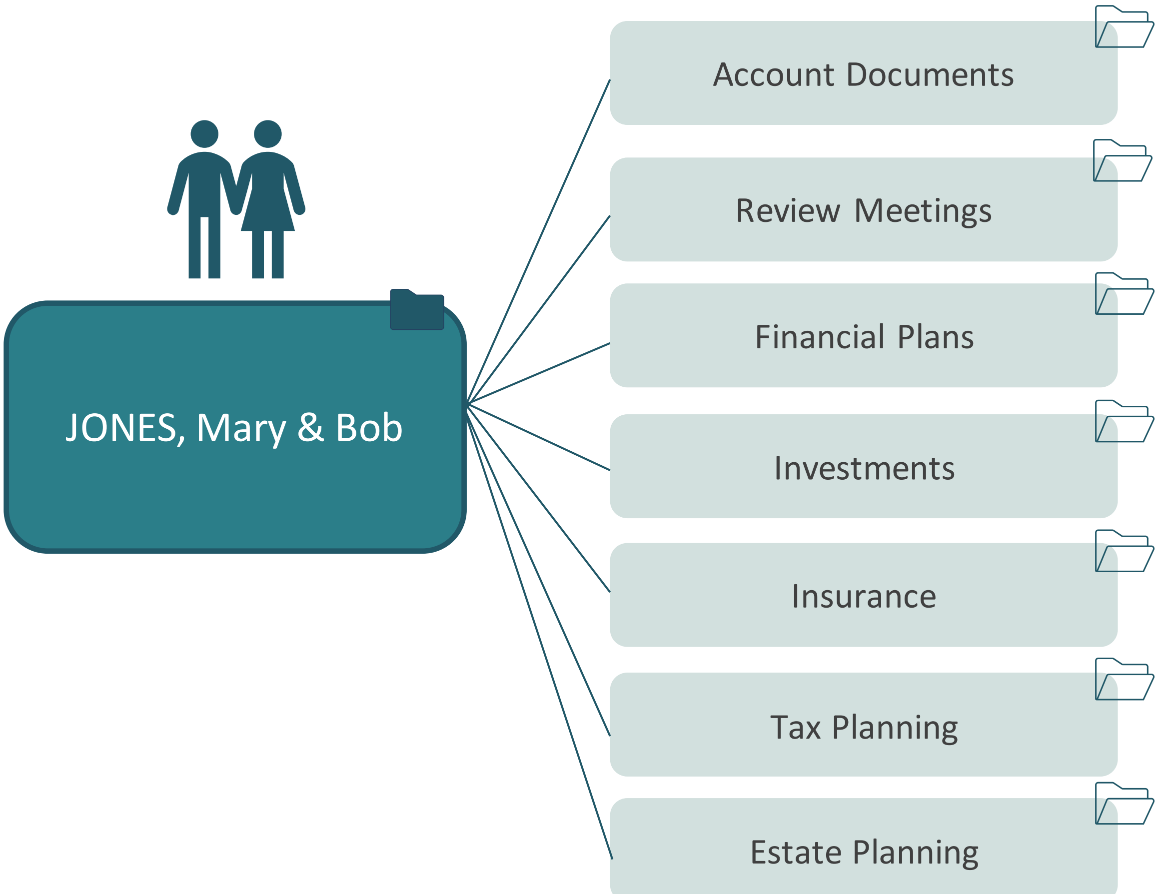
Setting Up Your CLIENT FILE Sub-Folders

It's important you set up sub-folders for each client file that are the same, so everyone knows where to find things. Below are some examples of what you may have as sub-folders to contain the various items that may be sent to or received from your clients over the course of your relationship.



If your team does not have a fully integrated CRM, this list may be longer and include things like Emails, Client Profiling Information, Moments of Truth, etc. Ideally, you have a CRM to store this type of information in for easy access, updating, and use.