



The Streamlined Office, LLC

Take Time to Make Time

Every office should have established processes in place to optimize efficiency. Without organizational systems to manage workflow, many people are left feeling overwhelmed in their attempt to juggle all of the tasks at hand. Are you missing or struggling with any of these critical areas?

Document Retention Guidelines

Do you have a clear and concise list of documents that need to be kept? Do you know why you keep your documents and for how long you should keep them?

Paper filing systems

Do you have a process for handling paper documents so that information can be found quickly and easily or are you wasting precious time looking for things that you can't find?

Digital filing systems

Do you have a digital filing system with naming conventions and appropriate backup? Is your digital information secure and at your fingertips no matter where you are? Can you find it when you need it?

Email

Is your Inbox overwhelming or do you maximize its effectiveness by using available options like folders, filters, categories, tags, and automatic scheduling for correspondence and replies? Do you have rules to control your inbox volume and keep it manageable?

Digital calendar

Do you create calendar appointments, notify attendees, and update changes directly from your email? Is your calendar overloaded or is it a tool that categorizes and prioritizes events and tasks to help you use your time as efficiently as possible?

Customer Relationship Management (CRM) systems

Do you have a system that allows you to track clients or do you struggle with prospect follow-up and lose business as a result?

Physical workflow

Does your office space represent your expertise by looking organized and well run or does the clutter in your office reflect a lack of systems and processes?

Technology

Are you using technology to make your business processes easier and more efficient or do you avoid it because you are not proficient? Do you need help deciding what software to use and how to use it to streamline your business processes?

The Streamlined Office has solutions! We can help you overcome the obstacles to success created by inefficient systems and poor workflow. If you need help with any of the above or have questions, please visit our website at www.thestreamlinedoffice.com or contact us at 480-221-0588 for a FREE consultation.