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# What is file management and why does it matter?

**DAM** 4 minute readWritten By **Libby Marks**, Aug 5, 2021 file management

File management. It might seem like a self-explanatory concept. It's pretty clear that it's about managing files. Is there really anything more to discuss?

Heck yeah. We're here to champion how effective file management can make your team more productive, less frustrated and even relight your creative fire. Consider us your file management cheerleaders. Now gimme an F...

## The evolution of file management

In the olden days, files were physical things. You bought them at stationery shops and lovingly filled them with dividers and poly pockets and hundreds of sheets of paper. They could take up whole rooms. And people with rubber thimbles had to flick through them to find information.

These days, we've all gone digital. Paper files are mostly consigned to history and important information is stored electronically. Today, businesses have hundreds, thousands –

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effectively. Especially in creative operation teams like marketing, design, and brand management. So you'd have thought we'd have digital file management nailed by now.

But all too frequently, we don't.

## The problem with file management

Where do we start? File management is very easy for businesses to get wrong. We know it's not for want of trying. No judgement here. There's lots of reasons file management can slip.

People are busy. Moving files from your desktop or email onto a shared server is a 'tomorrow' task that doesn't always happen.

Or people implement systems but then lack the time to really embed them.

And before you know it, you've got a deadline at noon tomorrow and no idea where to find that file you desperately need.

Do any of these sound familiar?

- *"Who knows where the Smith photoshoot is? It's not in the folder."*
- *"Which of these logo files is the right version? Is it the one called 'Final', 'Final v2' or 'FINAL Final'?"*
- *"Hannah's got the August artwork on her desktop. When's she back from holiday?"*
- *"Can you forward me the email with those proof sheets attached?"*

If they do, that's a surefire sign your file management isn't up to snuff.

## What is file management?

File management is the systematic process of storing, naming, retrieving and retiring electronic files. We call them digital assets.

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At the very least, a file management system should comprise:

- A secure location to store files – something scalable, that can meet your future needs, is best
- A logical structure – to help people navigate to the files they need
- Search functionality – to help people find files faster
- Agreed naming conventions – so file names make sense to other users
- Permission levels – so you can control who sees what
- An archiving process – to get rid of old files and declutter your system
- And that's before we get onto wishlist functionality – stuff that would make work life so much easier – like:
- Visual previews – so you don't need to click in to see whether it's the right file
- Version control – that automatically tells you which is the most recent file
- Advanced search – that lets you search on document content, not just file name or date
- Archiving prompts – that automatically identify older files and nudge you to take action
- Remote access – so people can access assets wherever they're working from
- Even automated processing – like letting you download files in different formats

These might seem like a dream – especially if you're used to rummaging through file servers to find what you need – but there is software that provides this level of ease and transparency.

## The risks of poor file management

To you as an individual, your company's haphazard file management might just be an inconvenience. But at an organisational level, it's a real risk. Here's why.

### Productivity

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The time and energy you waste searching for files is time you could spend on more important stuff. Like coming up with crazy creative ideas for a new campaign. Or making sure your colleagues don't publish ANOTHER event programme with the old visual identity.

How long do you think you waste each week on searching through folders, email and Dropboxes to find the files you need? Multiply that by the number of staff in your team. That's a lot of wasted time.

### **Time-to-market**

We don't want to go too Gordon Gecko, but time is money. Delays getting campaigns, information or products to market can cost your business big time. So missing a deadline due to poor file management is a mistake you can't afford to make.

### **Recreating assets**

Ineffective file management can also translate into duplicated effort and additional creative costs.

For example, if you need a new piece of marketing collateral for an existing campaign, it's much quicker and easier to repurpose some existing artwork. But not if that's on Simone's computer and Simone's in Magaluf for the next two weeks...

### **Legal exposure**

Effective file management isn't just about working faster and smarter. There's also a whole heap of legal reasons to love it too.

- Companies that fail to protect data can face massive fines under GDPR laws.
- Some assets are protected by copyright and are subject to certain conditions.
- Confidential or proprietary files could prove costly if they fall into the wrong hands.

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risk.

## The benefits of better file management

Based on the list of risks above, you can expect better file management to result in:

- Higher productivity
- More time for creativity
- Reduced time-to-market
- Lower costs
- Lower legal risk

But – in true infomercial style - that's not all. Here's some other benefits you can expect:

### Better brand control

If colleagues in the wider business can find the assets they need, they're less likely to commit crimes against brand. Like using pixelated logos or dodgy stock photos they've found online. It also means you'll have to field fewer requests for support, as people easily self-serve assets.

### Improved collaboration

In the new normal, your team might be anywhere in the world. That means it's a lot harder to holler to your teammates and ask 'where's such-and-such again?' Effective file management - and remote accessibility - is more important than ever.

### Smarter searches

Most dedicated file management systems use tagging to make files super-searchable. Some even use AI to add tags automatically based on contents. This means, so long as you can vaguely remember what a photo looked like, or document was about, you can search for it. Woo hoo.

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