

How to Organize Your CI Project Files

by *David Lithwick*

Introduction

One of the greatest challenges in CI is keeping your project files organized. Unlike marketing research studies where findings are based on one type of sample audience (eg focus group participants or mall survey intercepts), CI investigations tap into a multitude of sources to insure findings are accurate and thorough.

Similar to medical investigation, and military intelligence, CI pounces on **fragmented data**, consolidates this data, verifies the findings, and then provides direction to make a decision. Many CI programs flounder due to files being disorganized. Disorganization translates into last-minute searches for information, delays and missed opportunities.

The consequences of poor file organization is best illustrated in the American Civil War. The confederates lost the battle of Petersburg, because General Lee never received the critical updates on enemy troop movement that had been sent to him from his battalion commanders. Apparently, clerks mistakenly filed the communiqués in a warehouse. As a result, union forces surprised and overwhelmed many of the confederate troops. Bringing this lesson to the present, have you ever been asked to get information quickly? When the one report you needed was floating around in someone's office? A directory for locating files would have resolved this frustration.

Objective

The objective of this article is to make the reader aware of the importance of a project directory tree for organizing CI project files.

If You're Organized, You're In Control

Let's assume that regardless of your efforts to

Downsides to Not Keeping CI Project Files Organized

- **Increased likelihood of omitting an important detail that should be included in the study.**
- **Increased likelihood of accidentally deleting a file. Signal to colleagues that you're not taking CI seriously.**
- **Wasted money by starting from scratch for each new project.**
- **Wasted time to locate a file**

be accurate, thorough and meticulous, you face opposition and criticism from a line of business manager who feels threatened by the studies you have prepared. Your credibility is at risk, perhaps even your job. To diffuse this situation, you agree to meet with the individual.

At the very least, being organized by using a **project directory tree**, enables you to quickly access the information in question, and hence, the issues at hand. In other words, incorporating a directory tree to organize your files is a task to help your CI program survive.

Project Directory Tree

A project directory tree (see Figure A) is a single page description of the project files. Project directory trees are interactive. CI managers use them for overheads in presentations, attachments to reports, reference sheets posted beside filing cabinets and directory listings of files in their hard drives. The tree is broken into 4 divisions:

Branches

There are two:

- one for the actual report
- the other for backup material.

Figure A

Glossary: Section Heading
 📁 Folder Inside a Section
 ➡ Separate File

Branch - Actual Report

- ➡ Introduction
- ➡ Objectives and Method
- ➡ Glossary
- 📁 Executive Summary
- ➡ Net Impressions
- ➡ Recommendations

Key Findings - Primary CI

- 📁 Competitor Surveys
- ➡ Observations and Implications
- 📁 Call Center Mystery Shops
- ➡ Observations and Implications
- 📁 Internal Audit
- ➡ Newsletters
- ➡ Research Reports
- ➡ Career Appointments

Appendices

- ➡ List of Helpful Sources
- ➡ Copies of Competitor Literature

Section Headings

These are fairly standard:

- Introduction
- Executive Summary
- Key Findings
- Appendices

Folders

These allow the reader to glance at the contents of the entire report.

Files

Each folder contains a series of files that provide specific details.

Conclusion

Directory trees have since helped a number of Canadian corporations to, as one CI manager put it, "Keep on top of the information, versus having it buried in someone's files." It is no exaggeration to state that of the 20+ corporations which we have helped to formalize CI programs, at least 5 came to us with their CI files dumped into cardboard boxes. Becoming more organized in order to meet **basic** information inquiries will fast-track and improve decision-making within your company. ●

Branch - Back Up

- ➡ Proposals
- ➡ Goals of Assignment
- ➡ Market Drivers
- ➡ List of Must Know Questions
- ➡ Report Format Requirements
- 📁 Instructions
- ➡ Instructions for Field Interviewers
- ➡ Instructions for Mystery Shoppers
- 📁 Client Correspondence
- ➡ Contact Reports
- ➡ Meeting Agendas
- 📁 Logistics
- ➡ Project Reference Code
- ➡ Project Schedule
- ➡ Tabs for Binder
- ➡ Project Team L