

How to Reorganize Your Operating System

Like any good operating system overhaul, this isn't a one-and-done effort. Operating systems should be continuously updated and maintained to ensure optimal efficiency and ease of use. Here's how we approached it:

1. Audit Your Existing Structure

Take inventory of everything—file paths, folders, templates, and naming conventions—and map them into a spreadsheet. This gives you a visual hierarchy to better understand your current setup and spot opportunities for improvement.

2. Simplify Naming Conventions

Research best practices around file naming and propose changes in the spreadsheet before rolling them out. This allows time for team feedback and alignment. Once approved, document your updated naming protocol in an SOP to maintain long-term consistency.

3. Control File Versions

Decide when to overwrite a file versus when to create a new version. We removed a ton of clutter by defining a simple versioning rule—and haven't looked back since.

4. Clarify Your Process

Get super clear on how your unique process or approach delivers value to your clients. Without clarity, your operating system will feel reactive and disjointed.

5. Map to Your Workflow

Using your clarified process, map how work actually gets done across your teams. Your file structure and systems should support—not obstruct—those rhythms. If they don't, you may need to refine your process before restructuring your tools.

6. Align With Your ERP

If you're using an ERP or project management system, mirror the folder hierarchy and naming conventions. This creates a seamless bridge between execution and documentation, reducing friction and confusion.

7. Standardize & Streamline Core Documents

Create and refine SOPs, processes, and templates for consistency and assign owners to each. Owners should be responsible for maintaining and updating these documents as needed, and they should be revisited every month.

8. Test & Tweak

Roll out changes in stages, gather feedback, and iterate. Perfection isn't the goal, progress is. As your business evolves, your operating system should evolve with it. The more you invest in ongoing refinement, the more return you'll see in team clarity, client satisfaction, and overall momentum.

9. Establish Governance & Training

Make sure your team knows how to use the new system and understands the why behind it. Offer training where needed, and set clear expectations around file hygiene, versioning, and ownership. Most importantly, treat a clean, well-structured system as part of your culture—not just a one-time project. When everyone embraces the mindset that clarity is a shared responsibility, the system can stay strong long after rollout.

Download our free [Operating System Template](#) to help get you started.

"Let all things be done decently and in order."

– 1 Corinthians 14:40