

## Look Back In Chaos?

By Joshua Stein, PLLC



We needed to get it finished and out the door quickly to meet the deadline. But we did it! We did a great job and met the deadline. And now we can go on to the next thing.

Three weeks or three years from now, though, someone will have a question about the great thing that we just accomplished. It might be a call from a client at 4:45 p.m. on some Friday afternoon about the condemnation clause on page 37 of the lease. Or if we sent out some information or document to a client, a friend or some bureaucracy, they might never receive it. They might need another copy or want to talk about it. If we sent or paid a bill, someone will have questions about the payment or the amount of the bill. Or the payment might get lost. Or we might ourselves need to refer to whatever it was, to confirm what we said or did, or just to get ideas or examples to use for something else later.

When those things happen, we will need to have some history of what happened. And we never know who will call about what and when, so we need to have a history of everything that happened. Creating that history is one extra counterintuitive step at the end of each project, great or small. That's true in a law firm, a real estate office, or any other business or organization. It's even true for much of what we do in our personal lives.

Maybe most projects we complete will never require any followthrough or later attention. But some percentage of them always will. And when they do, we need to be able to find the history of what we did – quickly and without making ourselves crazy.

It's easy to skip the extra step of creating a suitable record of finished work, in all the excitement and relief of finishing a project and jumping into the next one. Starting the next project is way more fun than dwelling on the one just completed. And keeping good records isn't exciting. In fact, it's boring and tedious. So sometimes it's tempting just to figure out some way to keep any old record of what happened, throw it into the file box or onto the network server or cloud storage, so someone can deal with it later, and go on to the next thing.

That's not such a good idea. If we wanted to maintain some institutional memory, some history of what happened – and we really need to do that – then we have to be able to find whatever it was. That means, first, figuring out the one most likely place where someone will look for it, putting it there and only there, and labeling it in a way that someone will be able to find it when they go looking for it. So it requires more than just doing the minimum to get it out of the way so we can say we kept a copy somewhere. That copy, that record of what we did, has to be findable.

To achieve that, we need to start by having a logical structure and system to keep track of our information and our history. Instead of just throwing each record wherever seems to make sense at the moment, we need to think about the information and activities we handle again and again. Then we need to create a record-keeping structure that matches the structure of what we keep doing. If we make that structure up as we go – creating some suitable home for each piece of information as soon as it arises – we will gradually build a tangle of unfindable information. We won't maintain the institutional memory that we need because we won't know where to look for anything. Any given piece of information could be in a dozen different places.

Once we know where to put any given piece of historical information, we then need to make sure we put it there in a way that helps us know what it was. In an electronic filing system, the only way we can identify any particular document is by giving the file a suitable name. If we don't do that, then the only way to find any particular information is to look in every file until one finds it. That makes no sense, of course. With a paper filing system, the key is to set up appropriate categories and make sure each thing ends up in the right category so we can find it later.

And once we take the time to create the right system, we need to follow it consistently, without making exceptions or complex variations. Otherwise we will look back in chaos.

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