

DIGITAL FOUNDATION PLAYBOOK



Small businesses power the economy. Let's build systems that keep yours running strong.

Welcome!

This playbook provides the essential tools you need to set up, understand, and confidently use Pivot Systems' folder structure, along with guidance on core principles and foundational processes. It serves as your starting point for bringing more clarity, ease, and consistency to your backend operations.

When you implement and maintain these practices, you'll begin to see a positive ripple effect across your entire business. On its own, this foundation creates meaningful organization and momentum. Depending on your business needs and long-term goals, you can later expand on this groundwork to further enhance and refine the digital landscape of your business.

Most small business owners struggle with scattered files, unclear systems, and digital and technological stress. This kit solves that by giving you structure, clarity, and habits that work.

If you're feeling overwhelmed by digital chaos, you're in the right place.

Table of Contents

Quick Start3

Troubleshooting Guide5

Folder Structure6

Long-Term Storage8

Source of Truth10

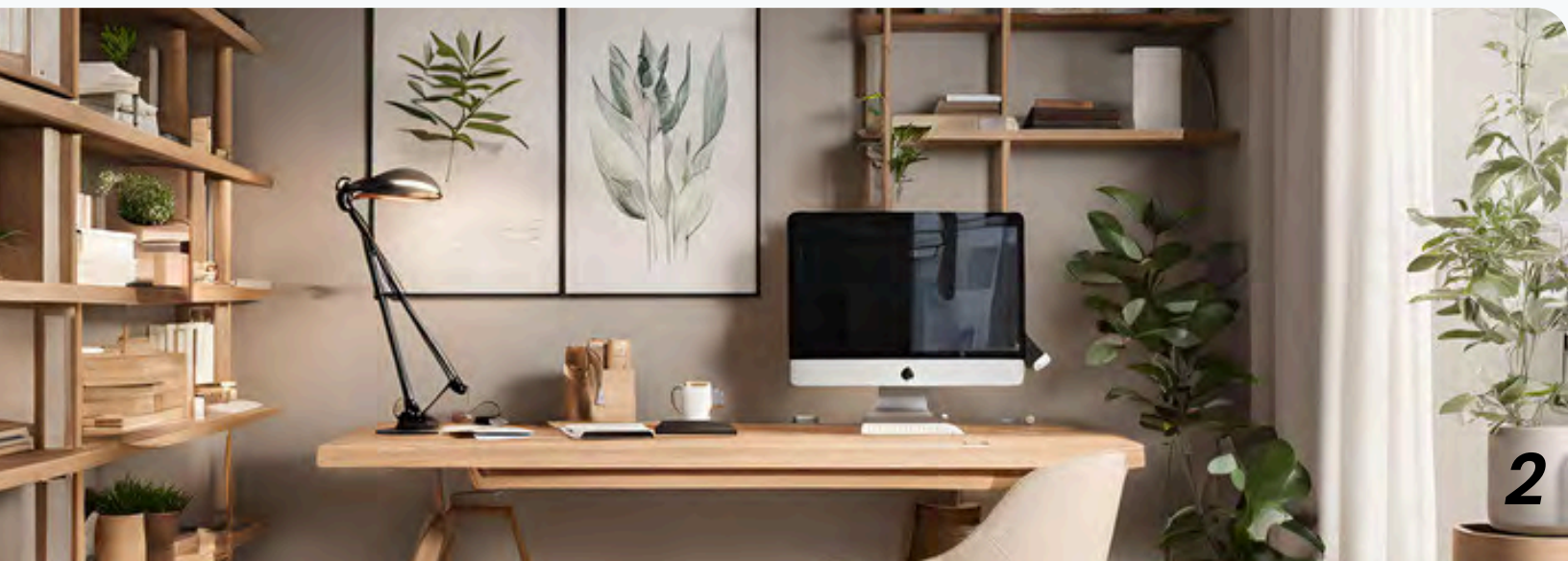
Archive11

Reconciliation12

File Naming13

Best Practices14

Next Steps17



Quick Start Guide

Before you continue: The information in the Quick Start Guide walks you through installing the Pivot Systems Folder Structure. There is more detailed information later in this Playbook. If you want to get started right away and don't want to dive into the details yet, follow these steps first to get the file structure set up. If you'd like to learn more before installing, proceed through the rest of the Playbook and then come back to install when you're ready. Installation takes less than 5 minutes.

Follow these steps to install your Pivot Systems Folder Structure, with subfolders. No technical skills required.

Install the folder structure on your computer, not your cell phone. You can later map the folder structure to a cloud-based software or application to access your folders on other devices.

Windows Instructions

- 1 Click the button to download the script.

[Windows](#)

- 2 Run the script.

Go to the *Downloads* folder and double-click the file. Approve the security warning (if one appears).

- 3 Find your new folders.

Find the new folders in your **Documents** folder:
C:\Users\YourUserName\Documents\Your_Business_Name

- 4 Rename the top-level folder.

Right click and change *Your_Business_Name* to your actual business name using underscores for spaces.



Want to be notified of changes or updates to the playbook, including the scripts?

[Let me know!](#)

Mac instructions are on the next page

That's it! You can begin using the folders as is or continue on for more info and best practices.

Mac Instructions

1 Click the button to download the script.

A ZIP file will save to your *Downloads* folder.

[Mac](#)

2 Extract the script.

Open your *Downloads* folder and double-click the ZIP file.

3 Run the installer.

Open terminal (Applications → Utilities → Terminal). Paste the command below into the terminal and press *return*:

```
chmod +x ~/Downloads/Pivot_Systems_Folder_Script_Mac.sh &&  
~/Downloads/Pivot_Systems_Folder_Script_Mac.sh
```

Approve macOS security prompts if needed:

System Settings → *Privacy & Security* → *Allow / Open Anyway*

Then run the command again by copying the command into the terminal and press *enter*.

4 Find your new folders.

Find your new folders in your *Documents* folder:

`~/Documents/Your_Business_Name`.

5 Rename the top-level folder.

Right click and change *Your_Business_Name* to your actual business name using underscores for spaces.



Want to be notified of changes or updates to the playbook, including the scripts?

Let me know!

That's it! You can begin using the folders as is or continue on for more info and best practices.

Troubleshooting Guide

Q: My Mac says the script can't be opened.

A: macOS is protecting your computer.

Go to: System Settings → Privacy & Security → Allow Anyway
Then re-run the Terminal command.

Q: Windows says “protected your PC.”

A: The script is safe. Click: More Info → Run Anyway

Q: My folders didn't appear.

A: Check:

- Are you looking in Documents (not Downloads)?
- Did you rename or move the script before running it?
- Is your username folder locked or redirected (rare corporate setup)?

Q: Can I run the installer twice?

A: Yes — it will not overwrite existing files.

Q: Can I delete the scripts afterward?

A: Yes, once the folders are created.

Q: What if the script is updated later by Pivot Systems?

A: Sign up for [Pivot System's Digital Foundation Kit Change Notifications list](#). You'll receive an email notification with a summary of updates to playbook, including the scripts. You can choose to update or not; your existing folder structure will remain intact regardless.

Q: I have other questions.

A: Reach out to us at info@pivotsystems.io or by setting up a free 30-minute consultation on our [calendar](#).



Folder Structure Overview

This is more than a set of folders - it's the basic architecture of your business operations. Below is a list of the high-level (parent) folders with examples of what might be found within them.

01_STRATEGY

Your goals, planning, reviews, and learning materials.

02_OPERATIONS

Admin, marketing, finance, legal, and internal projects.

03_OFFERS

Your products and services - what you sell.

04_SALES

Leads, quotes, proposals, contracts, and testimonials.

05_CLIENTS

Client onboarding, active work, and past client files.

06_PROCESSES

Workflows, templates, standard operating procedures (SOPs).

07_TOOLS

Technology inventory, systems, and integration documentation.

xx_RECON

Your temporary holding area for files you haven't dispositioned yet. The reconciliation process will be described more later in the Playbook.



The script provides some subfolders; you can create other subfolders as needed.

Folder Structure : Tips

Everything in this Playbook, including the folder structure, is a *guide* – a solid place to start. Feel free to modify, add, and delete folders as needed to make it align with your business and mental model. That said, here are a few tips to keep in mind as you do that:

- Don't overthink it. Use the structure as is to start. All new things take time and practice to sink in. Once you've used it long enough to gather data, consider changes if needed.
- Before making changes, be sure you clearly understand why and consider it from both long- and short- term perspectives. Document your changes along with a rationale for reference later.



- I don't recommend abandoning the concepts of SOT or archive.
- When you're ready, it's helpful to mimic relevant pieces of the folder structure in other places that a folder structure is used. For instance, if you use a tool with internal folders (Canva is one example), creating a similar folder structure within it will reduce mental load and time. This ensures that your mental model is consistent; *Operations* = *Operations* everywhere.
- Take your time. It likely took years to accumulate your digital footprint so don't expect to disposition it all immediately.
- Focus on the information you need in the short-term to accomplish your immediate projects and goals.

You do not need to organize your entire digital history today.

Long-Term Storage Strategy

A Practical Approach to Handling Your Old Files

If you have years of files scattered across desktops, downloads, cloud drives, multiple computers, USB sticks — *you are not alone*. (We all do!)

Why You Shouldn't Sort Everything Now

Sorting old files can feel productive, but it's often productive procrastination:

- It's familiar and easy
- It gives quick check-the-box dopamine hits
- It pulls you into hours of low-value busywork
- It distracts from work that actually drives revenue

Your energy is better spent on:

- Current projects
- Active clients
- Work that is closest to cash flow

Do this...

- Create a **"Long_Term_Storage"** (LTS) Folder inside your new business folder structure.
- Use subfolders inside LTS. This is important! Don't create one giant dumping ground. Create a few broad, descriptive buckets such as:
 - Dropbox_Archive
 - Old_Photos
 - GoogleDrive_Legacy
 - Past_Clients
 - Old_Computer_Backups
 - Personal_Archive

These don't need to be precise — you need just enough structure to keep the chaos contained.

✦ *Keep going to the next page!* ✦

This is digital decluttering with prioritization insight built in: pack things away safely, then only unpack and organize what you need.

Long-Term Storage Strategy

Lastly, do this...

- Bulk move old files into the subfolders you created.
 - No sorting.
 - No renaming.
 - No organizing.
 - Just move them so you can start fresh.

That's it. Now you can rest easy and go back to the project you were working on.

Everything stays

- Safe
- Searchable
- Out of your way

Why This Works

- Reduces mental and visual clutter
- Helps you eliminate duplicate tools and storage apps
- Keeps historical info accessible without overwhelming you
- Lets your new system stay clean and functional
- When you need an old file, just search for it in LTS — and when you use it again, move it into the proper home in your new structure.
- Only the relevant files “graduate” into your active system.
- Protect Your Focus
- A certain amount of organization creates clarity — but past a point, the returns diminish quickly.
- This approach keeps you moving forward without getting trapped in an endless sorting project.

You don't need to finish organizing your past to confidently build your future.

Source of Truth

In a business, information often lives in many places—files, emails, apps, people's computers, or in someone's head. A Source of Truth (SOT) is the single, trusted location designated as the place where a particular piece of information originates or is kept accurate.

Understanding and incorporating the SOT principle ensures that:

- Everyone is using the same, correct data.
- Changes happen in one controlled place.
- Data flows cleanly between systems without confusion or duplication.
- Business operations don't rely on outdated or conflicting information.



The term SOT can apply to:

- Documents (e.g., the official version of an SOP)
- Data (e.g., where customer records actually live)
- Systems (e.g., which app is responsible for generating invoices)
- Configuration information (e.g., where product settings or templates are managed)

For the purposes of this playbook, which primarily focused on files, it's important to remember that official, approved files should always go in 0_SOT within the appropriate folder. If that version of the file is superseded by a newly released version, the old one should be moved to the Archive folder and the new SOT will replace it.

SOT: One source. One truth. No confusion.

Archive

In your business's filing system, the Archive is the organized home for material that is no longer current or being actively used but is still valuable to keep.

The Archive provides a clean separation between active work and past work. This helps prevent confusion, reduces clutter, and ensures that teams always know which documents are official and current.

An archive may include:

- Older versions of released documents
- Drafts created during the development or review process
- Files replaced by updated versions
- Materials retained for regulatory, historical, or audit purposes
- Past templates, design iterations, or system configuration versions

Within an archive, you can use subfolders to keep things organized by:

- Document type
- Project or client
- Release version
- Date or time period

Archiving consistently makes it easy to reference older work when needed while keeping the main workspace clean, focused, and controlled.



Reconciliation

The Recon Folder serves as a temporary staging zone—a safe place to put digital items that need attention before they are filed correctly. It prevents clutter from spreading into your active workspace, but it is not intended to replace good filing habits.

The Weekly Recon Ritual

Once a week - most often on Fridays - you schedule a dedicated time block for reconciliation, during which you:

1. Open the Recon Folder
2. Review each item
3. Identify what it is
4. Name it correctly (if needed)
5. Move it to its proper home
6. Delete anything unnecessary

This keeps your system clean, controlled, and trustworthy, even when the week gets messy.

Examples of what may land in Recon:

- Downloads you haven't had time to sort
- Files someone emailed you mid-meeting
- Screenshots or data exports that need review
- Notes or drafts you created on the fly
- Receipts or invoices that need to be entered later

Your ideal, regular workflow is:

1. Name things accurately
2. Put them directly into the correct folder

But when that's not realistic, use Recon as a temporary buffer. What matters is that you clear it regularly so it never becomes a digital junk drawer.

File Naming

Consistent file naming saves hours of searching, prevents the frustration of lost documents, and removes confusion about which is the latest or most updated version. This simple system works across all platforms and grows with your business.

Working Documents

- r1, r2, r3... = Working revisions/drafts
- Still being edited, reviewed, or refined
- Not yet approved for use
- Internal working copy only
- Don't share externally

Released Documents

- Issue A, Issue B, Issue C... = Authorized releases
- Official, approved versions
- Ready for distribution/implementation
- Safe to share with clients/team



Description

This is the file name and should be simple and clear. Note that the date is typically not needed in the file name because this is captured in the properties of each document.

Examples

Brand_Guidelines_r1.pdf

Brand_Guidelines_Issue_A.pdf

Service_Catalog_Issue_A.xlsx

Simple formula:
Description_Status.extension

BEST PRACTICES

☐ 1. KEEP EVERYTHING IN ONE PLACE (ONE SOURCE-OF-TRUTH)

- Store all your important files, contacts, and information where everyone can find them
- No more hunting through different computers or asking "Who has the latest version?"

☐ 2. CREATE STANDARD WAYS OF ORGANIZING

- Use consistent file naming (like "2025-08-29_Invoice_ClientName.pdf")
- Set up folder structures that everyone follows the same way

☐ 3. PROTECT YOUR BUSINESS

- Create strong passwords and decide who can access what
- Back up your data regularly - don't learn this lesson the hard way

☐ 4. DOCUMENT YOUR PROCESSES

- Document your key processes so anyone can step in when needed
- Include things like how you handle customers, process orders, or onboard new staff

☐ 5. SET CLEAR ROLES AND COMMUNICATION

- Everyone should know who makes which decisions and has final say
- Set up regular check-ins and clear ways to share updates

☐ 6. TRACK YOUR WORK AND DEADLINES

- Use simple project management tools to stay organized
- Know what's due when and who's responsible for what

☐ 7. KEEP LEARNING NEW SKILLS

- Set aside time to learn about new tools and techniques
- Encourage your team to stay current with digital trends

☐ 8. CHOOSE TOOLS THAT WORK TOGETHER

- Pick software that complements your other systems
- Avoid having too many different platforms that don't connect

☐ 9. CHECK IN REGULARLY

- Review what's working and what isn't every few months
- Make adjustments before small problems become big ones

☐ 10. KEEP TRACK OF IMPORTANT DECISIONS

- Write down why you chose certain tools or processes
- This helps when you need to make changes later

Once you're confident with the foundations above, consider the actions on the next page. Start small and be intentional. A process or system is only as strong as the people who interact with them.

BEST PRACTICES

☐ TRY AI WHEN YOU'RE READY

- Start small with AI tools for customer service or content creation
- Don't feel pressured to adopt everything at once

☐ MAKE YOUR SYSTEMS TALK TO EACH OTHER

- Connect your tools so information flows smoothly between them
- Reduce duplicate data entry and mistakes

☐ AUTOMATE THE BORING STUFF

- Let technology handle repetitive tasks like scheduling or invoicing
- Free up your time for growing your business

☐ DON'T GO OVERBOARD WITH NEW TOOLS

- Resist the urge to try every new app or platform
- Master what you have before adding something new

Key Principles to Remember

- Foundation before automation – fix the basics first
- Less is more – integrate before adding
- Progress over perfection – better systems, not perfect systems
- Single Sources of Truth – one place for key data and files



If there isn't a clear purpose and return-on-investment, don't do it.

Next Steps

Master the foundations. Use them consistently. Watch chaos transform into clarity, confidence, and control.

Scan below to connect with us.
Need help or have questions? Book time.



Technology is moving quickly, and your business deserves to keep up. Subscribe for real-world strategies to streamline your operations and tech so you can confidently navigate the digital world.



Do you have a good handle on the foundations and want to go deeper?

The Systems Studio (TSS) will help you expand beyond the basics and simplify operations, strengthen systems, and design businesses that serve your lifestyle goals. It combines expert instruction, guided implementation, and collaborative support to make clarity, structure, and freedom achievable.