

## SOHO/Records Management™ (SOHO/RM)™

*From Chaos, Order.™*

### The Need

The computer and internet 'revolutions' have made most of us responsible for managing huge quantities of information. Sometimes this is in the context of a large office, where there are (or should be) rules and regulations for managing records and other information. However, more and more, people are working out of their homes or in a small office (often known as Small Office, Home Office, or SOHO), acting as owner/operator and office manager.

Time that *should* be spent marketing your services, or developing your products, is spent wading through emails, sorting piles of paper, and trying to find essential information.

- How many hours have you spent looking for information that should be at your fingertips?
- Have you had problems managing receipts, and other vital documentation?
- How many times have you had to search through multiple directories for an electronic file because you forgot what you named it?
- Are you aware of the legal requirements for your documents: how long you need to retain them, privacy issues, tax issues?
- Do you have too many duplicates? What's the latest version of that key document?
- Is your email inbox full of material you have already dealt with? What about your 'sent' box?
- If you need to deal with a lawsuit, an audit, or just meet with a demanding customer, are you sure you can quickly find the documentation – all the documentation – you need?
- Have you lost material that you couldn't replace because you didn't have a backup?
- Have you forgotten or lost passwords, making information unreadable?

***We can help.***

### What We Offer

For a low start-up fee, and a low monthly fee (based on an annual subscription, billed monthly), your SOHO/RM™ service will help you ensure that you can maintain your important work files, personal files, receipts, photos, and the other material you keep in your home or small office in a logical, sustainable and simple-to-use manner.

#### Initial Analysis and Set-up

Upon sign-up for the SOHO/RM™ service, you will receive a personalized analysis session (up to 3 hours, telephone/webinar) where we discuss your situation, obtain information on the kinds of information you manage (or want to manage), see how you think about information when you want to retrieve it, and note the other demands you may have that affect both your paper and electronically-based worlds.

We will also request information from you relating to the way you organize your folders now, screen prints, file lists, and other information. From an analysis of this, we will provide you with a customized, personalized approach to managing and organizing your information, using a proven 'base set' of tools.

You will receive a new folder structure (for organizing your electronic and paper files, with descriptors), information on how to name your files, procedures for managing information effectively (every time), and retention guidelines for how long each kind of material must be kept for legal reasons.

Your specific backup, security and privacy issues will also be discussed, and guidelines prepared that are simple and effective.

## Ongoing Service and Support

As a SOHO/RM™ subscriber, you can call us or email us with your issues or questions at any time; we are there to help. If you don't know how to file something, or a new category of information hits your desk or in-box, we can help you categorize it.

Every month, we will ask you to provide us with additional information on the types of information you are maintaining – changes, additions, things you forgot – and we will review your information classification scheme to ensure it is up to date with your needs.

Each month, our staff will review your file – the questions you have asked, the answers we have given – and, via a monthly telephone meeting, we will discuss any issues you have and provide you with suggestions that we believe will help you work smarter.

You will have access to our blog which contains articles we have written on information and records management, developments in the industry, links to interesting sites, software we find interesting, fast-breaking stories, and examples of what can happen when information is not well-managed.

Summaries of these items will be included in a monthly newsletter (PDF).



## About Us

Established in 1991, CONDAR Consulting has an eighteen-year history of helping institutions and individuals organize their information. We pride ourselves on providing practical advice to your problems and challenges.

We are not a technology company, we are a “common sense” company, with tried and true methods and tools for ensuring you keep only the information you need, dispose of information you do not need, capture/save material in an effective manner, and know how to get access to it quickly.

Generally, we believe you will be able to improve productivity and solve most of your “information problems” with simple procedural changes, a more disciplined approach to managing information, and the help and tools we give you.

CONDAR Consulting Inc. is a product-independent information management consulting firm. We are based in Ottawa, Canada, with another office in Southern Ontario. However, this service is internet- and telephone-based; no matter where you are, we can help you.

## SOHO/RM™ Subscription Cost (eff. Sept, 2009)

For individuals who work out of their homes, and for small businesses with 5 or fewer employees and only one location, the rates are as follows:

- Sign-up and Initial Analysis: \$495 (plus tax)
- Ongoing Support: \$75 /month billed to your credit card, based on a one-year subscription (plus tax)

## Other Businesses

Most of CONDAR's long history of records and information management consulting has been for the public sector and large corporations. If you have a larger organization, please review our corporate brochure at [www.condar.ca](http://www.condar.ca) and contact us to discuss your needs.

SOHO/Records Management™ - SOHO/RM™  
1-877-857-7111, ext. 16 (613-233-4962, ext. 16) [info@condar.ca](mailto:info@condar.ca)