

FREE GUIDE

The Tool Hygiene Setup

Make tasks and handoffs visible
inside your tools

The Right Tools, Wrong Hygiene

THE PROBLEM

Most businesses have the right tools. CRM, project management, file storage. But the tools are a mess. Files named inconsistently. Folders disorganised. Tasks buried in threads.

5-10 hrs

wasted per week searching for files and tasks

THE ROOT CAUSE

The information exists. It is just not findable. No naming conventions. No folder structure. No handoff format.

The solution is not a new tool. The solution is tool hygiene.

This guide gives you a 20-minute setup to clean up your tools and make handoffs visible.

The 3-Part Tool Hygiene Framework

NAMING CONVENTIONS

File Naming

[Date]_[ClientName]_[DocType]_[Version]

2026-02-10_SmithJohn_Invoice_v1.pdf

Folder Structure

Client → Document Type → Date/Version

/SmithJohn/Invoices/2026-02-10_...

Task Naming

[Priority]_[ClientName]_[TaskType]_[DueDate]

HIGH_SmithJohn_InvoiceProcessing_2026-02-15

HANDOFF COMMENT FORMAT

- **Status:** Complete / In Progress / Blocked
- **What I did:** One-sentence summary of what was completed
- **What is next:** One-sentence description of the next step
- **Attachments:** Link to relevant files or documents
- **Notes:** Any context, exceptions, or issues the next person should know
- **Handoff to:** @PersonName or Role
- **Due by:** Date and time

Install Tool Hygiene in 20 Minutes

6-STEP PROCESS

- 1** Choose one tool to clean up (CRM, project management, file storage)
- 2** Define your naming convention (use the templates or customise)
- 3** Create your folder structure (top level, second level, third level)
- 4** Rename 10 files or tasks using the new convention (build the habit)
- 5** Train the team on the new convention (10-minute walkthrough)
- 6** Enforce the convention for 2 weeks (no exceptions)

COMMON MISTAKES TO AVOID

Making naming conventions too complex

Keep it simple. Date, client name, document type, version. That is it.

Not enforcing the convention

Review files and tasks weekly. Rename anything that does not follow the convention.

Using inconsistent folder structures

Define the structure once. Use it everywhere. No exceptions.

Not documenting the convention

Write down the naming convention and folder structure. Share it with the team. Make it accessible.

Ready to Make Information Findable?

Unlock the Full Playbook

Get the complete Tool Stack Integration Playbook with CRM hygiene rules, project management workflows, and file storage automation.

[Unlock the playbooks library →](#)

Book a Strategy Call

I will review your specific tools, identify your top 3 hygiene issues, and show you exactly how I would clean up your systems.

[Book your 30-minute call →](#)

About Remotee

I help Australian businesses make information findable by building tool hygiene systems. I do not just place people. I build the systems, train the team, and give you ongoing support.

remotee.com.au