



# TASK SYSTEM STARTER KIT FOR SMALL TEAMS

**FILE STRUCTURE, TASK TEMPLATES, AND TEAM  
HABITS THE SUPPORT REAL WORK**

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## Why This Matters

- A high-level folder structure makes access management easier and more secure.
- A shared, organized file system reduces wasted time and confusion.
- A clear task system supports accountability. Everyone should know what needs to be done, who's doing it, and when it's due, without needing constant check-ins.
- Together, a strong file and task system creates alignment and clarity. Your team will move faster and collaborate with confidence.



# Folder Structure Overview

## Simple & Effective

Use a shared drive hierarchy to establish a simple high-level folder structure.

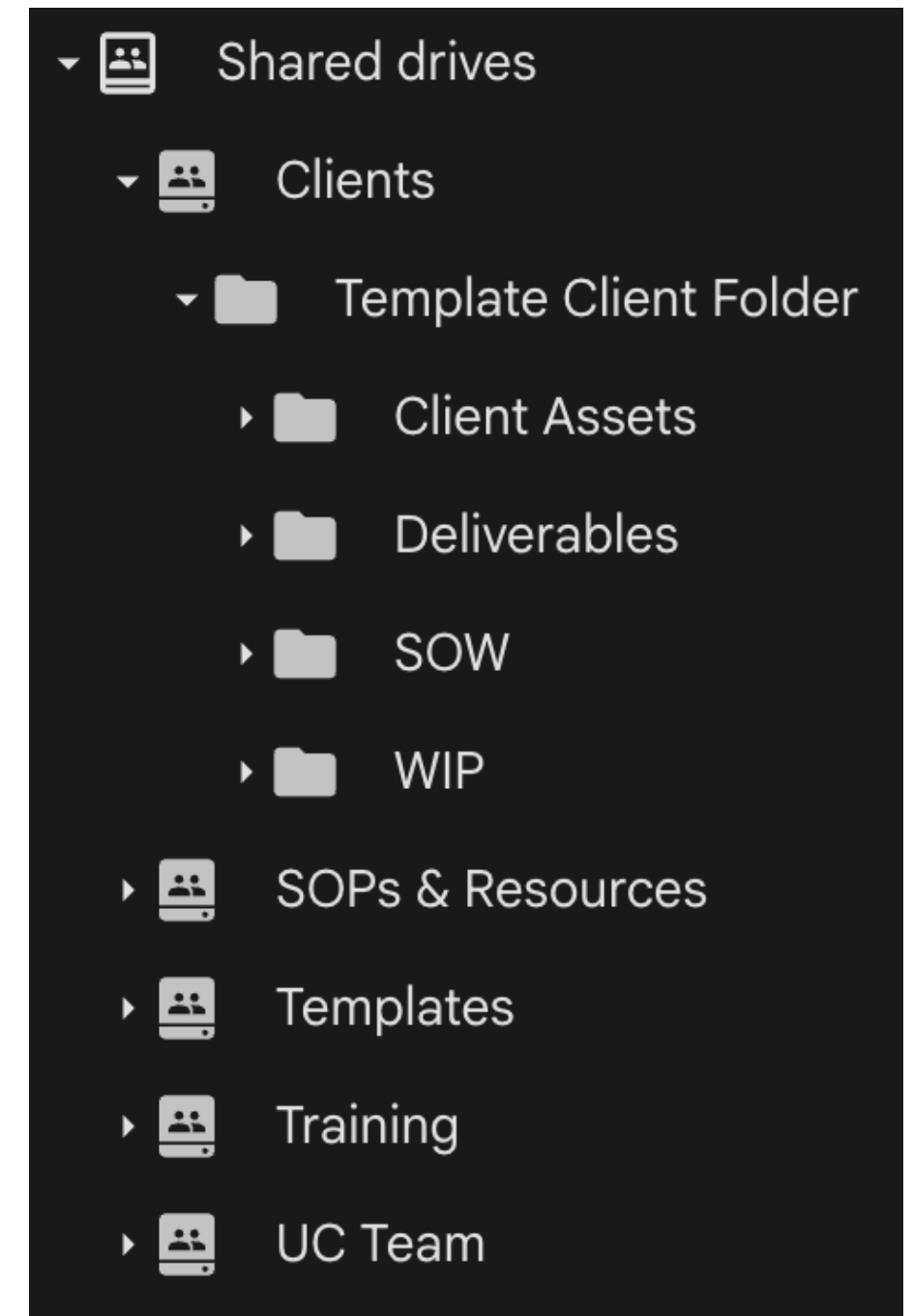
In Google Workspace, you can create multiple shared drives, and the access can be managed for individual members and/or Google groups by team. Once members are added to a shared drive, they'll be able to see all downstream folders and files.

Use the sample folder structure for Google Drive linked below as a reference. High level folders can be set as individual shared drives.

[Sample folder structure](#)

# Task System Starter Kit

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# Task System Setup

## Simple & Effective

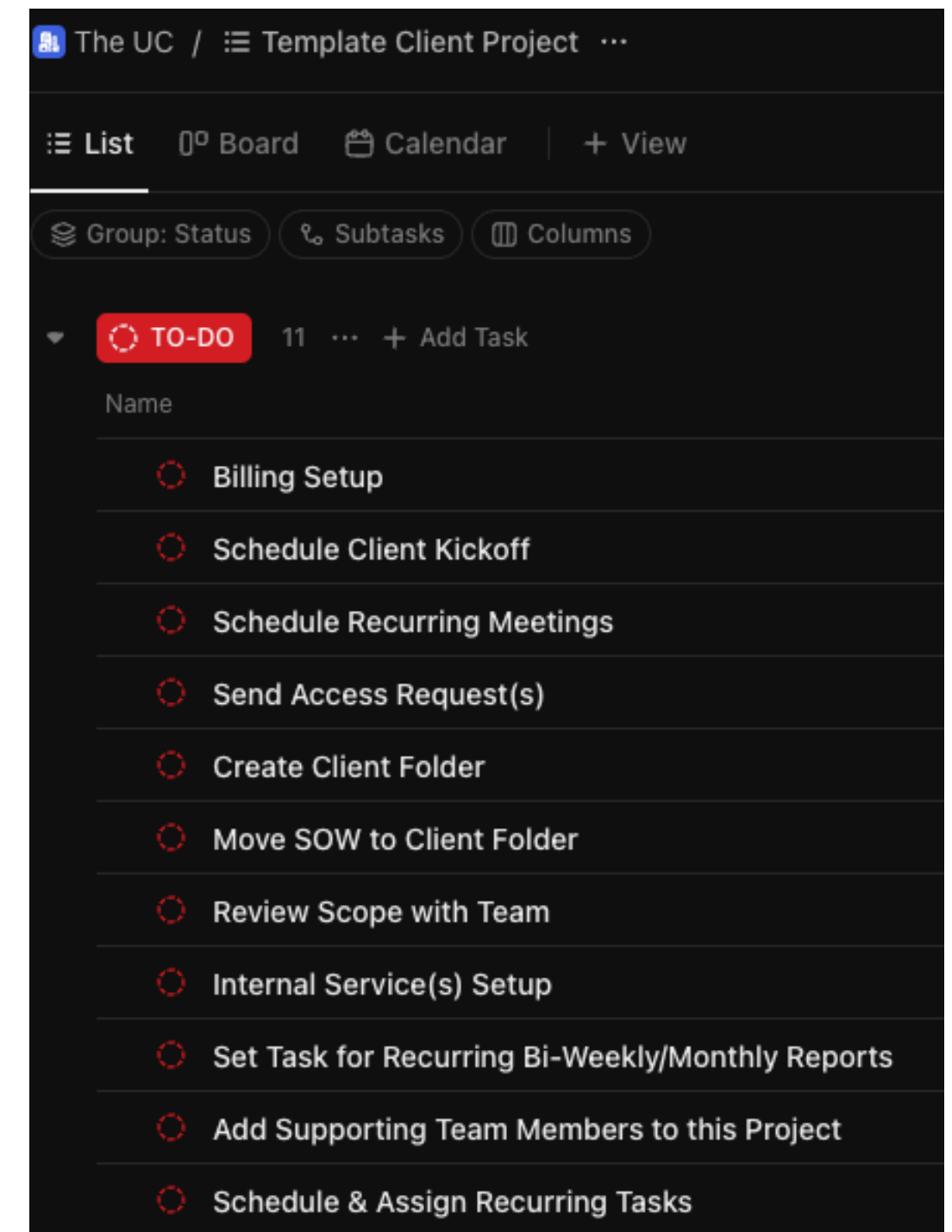
A task system should be used to ensure all required tasks get created and assigned, with clear instructions and due dates.

Use task templates for recurring workflows, and add descriptions and files as needed. You can also use tags for priority or other categories.

Use projects, lists, or spaces, depending on the tool - In ClickUp, each client might have its own 'Space', with lists for each workflow. Regardless of the tool, what matters is that all work gets done.

This [sample task structure](#) (ClickUp) can be used as a reference, modified, and saved as a list template.

# Task System Starter Kit



# Task Writing Checklist

## Make sure each task includes:

- A clear and specific task name
- Only one assigned owner (you can add collaborators)
- A due date or time range
- A concise description of the task goal
- Links to any relevant files or reference material
- A checklist for multistep items (if needed)
- Labels, tags, or custom fields (if your team uses them)
- Comments or @mentions for the assignee and/or other team members

[Task Writing Checklist](#)





# Task System SOP

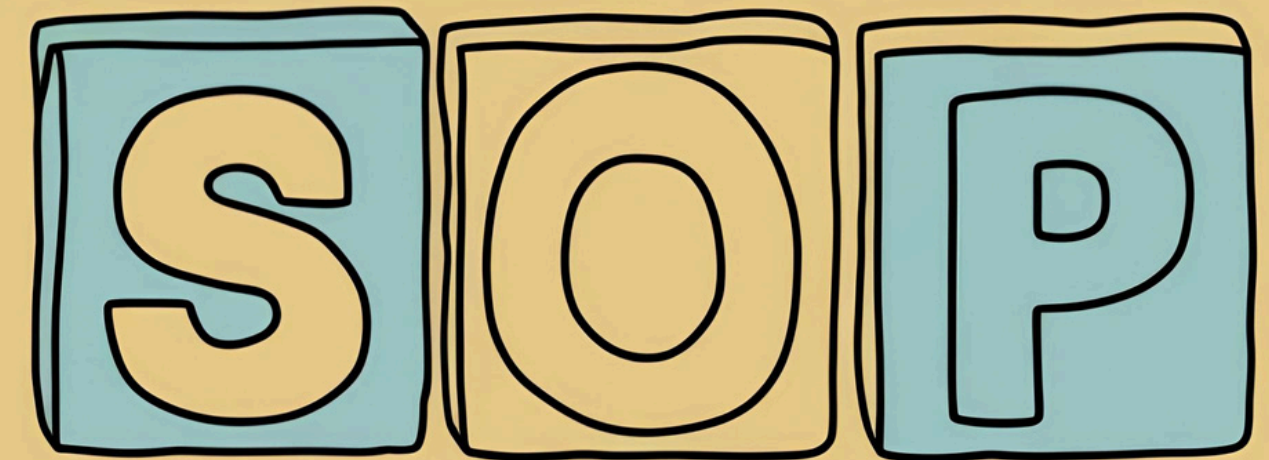
## Standard Operating Procedure

SOPs will include process steps, as well as descriptions on why they're useful, and who should follow them.

The task writing checklist covers basics when creating tasks, but use of the ongoing system will require maintenance. This includes:

- Checking tasks every day, at least once.
- Responding to comments within a specific time range.
- Update due dates as needed.
- Etc.

This [mini SOP for task system maintenance](#) covers the steps, scope, and purpose.



## Questions? Let us know!



Each business will need to tailor their task system to their needs.



Each team should collaborate on and maintain an organized file system.



As the systems evolve, teams can use reporting tools to evaluate the use of their systems, and work on improvements as needed.



Systems should be simple, and they should facilitate work. Still, they're setup and maintenance is time consuming. Let us know if you need help or have questions!