GOOGLE WORKSPACE

Google Drive
Business Folder Structure

A practical folder map for organizing clients, operations, finances, assets, marketing, and reusable business resources.

THE OUTCOME A Drive structure your team can understand quickly, maintain consistently, and expand without rebuilding from scratch.

Created by TaskSavvy Solutions

Built for small businesses that want clarity without another software subscription.

START WITH THE STRUCTURE

Five rules that keep Drive usable

PRINCIPLE	WHY IT MATTERS
1. One business root	Keep operational folders inside one top-level business folder or Shared drive.
2. Number the main folders	Numeric prefixes keep the most important categories in a stable order.
3. Separate active from archived	Do not make people search through closed work to find current work.
4. Design for roles	Organize information around how the business operates, not around individual employees.
5. Keep one source of truth	Links and shortcuts may point to a record; duplicate copies should not compete with it.

USE THIS AS A STARTING POINT Rename categories to match your language, but preserve the logic: one home, clear ownership, predictable names, and a deliberate archive.

The recommended top-level map

MAIN FOLDER	PURPOSE
00_ADMIN	Governance, policies, legal records, and internal reference
01_CLIENTS	Prospects, active clients, and closed client records
02_OPERATIONS	Recurring work, procedures, projects, and service delivery
03_FINANCE	Revenue, expenses, taxes, budgets, and financial reporting
04_ASSETS	Equipment, technology, vehicles, inventory, and maintenance
05_MARKETING	Brand assets, campaigns, website, social media, and content
06_TEMPLATES	Clean reusable documents, sheets, forms, and checklists
99_ARCHIVE	Inactive, superseded, or closed material retained for reference

00_ADMIN

The home for how the company is governed and supported.

/ 00_ADMIN	Company-wide administration
> 01_Company & Legal	Formation documents, registrations, contracts, insurance
> 02_Policies & SOPs	Approved policies and master operating procedures
> 03_People & Contractors	Role descriptions, onboarding, agreements, training
> 04_Vendors	Vendor contacts, agreements, purchasing information
> 05_Meetings & Planning	Leadership agendas, plans, and decision records

ADMIN RULE Keep approved company-wide policies here. Working project instructions belong in Operations, while client-specific agreements belong with the client.

01_CLIENTS

Use one folder per client, with the same internal structure every time.

/ 01_CLIENTS	All client relationships
> 00_PROSPECTS	Pre-sale records that need a temporary home
> 01_ACTIVE	Current client folders
> Client Name - CL-0001	Use name plus a stable client ID
> 01_Agreements	Signed scope, proposal, contract, change orders
> 02_Communication	Meeting notes and material correspondence
> 03_Deliverables	Working files and final client-facing outputs
> 04_Billing	Client-specific invoice or payment support documents
> 99_CLOSED	Former client folders moved intact after closeout

CLIENT PRIVACY Grant access to the smallest appropriate group. Do not place internal HR, legal, or company-wide financial records inside client folders.

02_OPERATIONS

The working home for repeatable execution, active projects, and operational knowledge.

/ 02_OPERATIONS	Day-to-day business execution
> 01_Recurring Operations	Weekly, monthly, quarterly, and annual routines
> 02_Projects	Time-bound internal projects and improvements
> YYYY - Project Name	A consistent project folder
> 01_Brief & Scope	Goal, owner, requirements, and success criteria
> 02_Working Files	Drafts and work in progress
> 03_Reviews & Decisions	Feedback, approvals, and decision records
> 04_Final Deliverables	Approved final outputs
> 03_Service Delivery	How products or services are fulfilled
> 04_Operations Logs	Audits, exceptions, maintenance, incidents, handoffs
> 05_Reference	Approved operational reference material

A clean project lifecycle

STAGE	FOLDER ACTION
1. OPEN	Create the folder from a standard template and assign an owner.
2. ACTIVE	Keep drafts in Working Files and decisions in Reviews & Decisions.
3. COMPLETE	Move approved outputs to Final Deliverables and capture lessons learned.
4. ARCHIVE	Move the full project folder to the correct archive by year.

LINK, DO NOT DUPLICATE If a project file also relates to a client, keep the authoritative file in its operational home and add a Drive shortcut in the client folder.

03_FINANCE

Protect access carefully and organize by fiscal year wherever possible.

/ 03_FINANCE	Restricted financial records
> 01_Revenue	Invoices, payment support, and revenue reports
> YYYY	Year-based records
> 02_Expenses	Receipts, bills, reimbursements, and expense reports
> YYYY / MM	Year and month when transaction volume requires it
> 03_Budgets & Forecasts	Approved budgets, working forecasts, cash planning
> 04_Taxes	Returns, notices, workpapers, and accountant requests
> 05_Banking & Funding	Statements, loans, financing, and merchant records

04_ASSETS

Organize the documents that support the asset register - not a second competing inventory.

/ 04_ASSETS	Asset documentation
> 01_Equipment	Manuals, warranties, photos, and purchase records
> 02_Technology	Devices, licenses, configuration references
> 03_Vehicles	Titles, service records, inspections, insurance support
> 04_Inventory	Count sheets, receiving records, and inventory procedures
> 05_Maintenance	Service documentation and recurring schedules
> 99_Disposed	Records retained after sale, disposal, or retirement

KEEP THE REGISTER IN CONTROL Track status, assignment, location, and next maintenance in AssetFlow. Use Drive for supporting documents and link them back to the asset record.

05_MARKETING

/ 05_MARKETING	Growth and public-facing assets
> 01_Brand	Logos, palette, fonts, messaging, and usage guidance
> 02_Website	Approved copy, page plans, SEO references, and exports
> 03_Content	Articles, guides, videos, and social content by channel
> 04_Campaigns	One folder per campaign with brief, creative, and results
> 05_Sales Enablement	One-sheets, proposals, case studies, and sales support

06_TEMPLATES

FOLDER	WHAT BELONGS HERE
01_Documents	Proposals, agreements, meeting notes, SOPs
02_Spreadsheets	Trackers, calculators, reports, and clean TaskSavvy templates
03_Forms	Intake, requests, feedback, inspection, and audit forms
04_Checklists	Repeatable operational and quality-control checklists
05_Project Folder Template	A complete clean folder copied for every new project

99_ARCHIVE

Archive by year or business category. Preserve context, restrict editing, and avoid using the archive as a miscellaneous dumping ground.

ARCHIVE TRIGGER Archive when a client closes, a project is formally complete, a template is superseded, or a fiscal year is finalized. Never archive something merely because it is difficult to categorize.

Simple naming rules

TYPE	PATTERN	EXAMPLE
Folders	NN_CATEGORY or YYYY - Descriptive Name	01_CLIENTS | 2026 - Website Refresh
Documents	YYYY-MM-DD - Topic - Status	2026-09-06 - Operations Review - FINAL
Clients	Client Name - Stable ID	Acme Services - CL-0042
Versions	Use status, not endless version numbers	DRAFT | REVIEW | APPROVED | FINAL

Access levels

ROLE	RECOMMENDED USE
OWNER / MANAGER	Structure, permissions, archive, and final deletion
EDITOR	Create and update files needed for assigned work
COMMENTER	Review without changing the source
VIEWER	Reference approved information only

PERMISSION RULE Give people the least access they need to complete their work. Review shared links and external access at least quarterly.

BUILD IT IN 30 MINUTES

Your 30-minute setup sprint

Start clean, move the essentials, and improve the structure as the business grows.

1	Create one top-level business folder or Shared drive.
2	Add the eight numbered main folders from the map.
3	Create the standard subfolders you need immediately.
4	Choose one naming rule and document it in 00_ADMIN.
5	Move only active, clearly owned files first.
6	Set permissions by role and test access with a team member.
7	Schedule a monthly 15-minute cleanup and archive review.

NEXT BEST STEP Once the folders are stable, define where client, task, revenue, asset, and operations data should live. BusinessCORE can then provide the operating view while Drive holds the supporting files.

Explore practical business systems at tasksavvycore.com