

Client Folder Structure Template

A simple structure for keeping client files organized, searchable, and easy to hand off.

RECOMMENDED FOLDER TREE

```
CLIENT - [Company Name]
├── 00_ADMIN
│   ├── Contract & Scope
│   ├── Invoices
│   └── Client Contacts
├── 01_ONBOARDING
│   ├── Intake Form
│   ├── Access Log
│   └── Kickoff Notes
├── 02_BRAND_ASSETS
│   ├── Logos
│   ├── Brand Guide
│   ├── Photos & Video
│   └── Templates
├── 03_STRATEGY
│   ├── Research
│   ├── Plans
│   └── Reports
├── 04_WORKING_FILES
│   ├── Drafts
│   ├── Review
│   └── Approved
├── 05_DELIVERABLES
│   ├── [Month / Campaign / Project]
│   └── Final Files
├── 06_REPORTING
│   ├── Weekly Updates
│   └── Monthly Reports
└── 99_ARCHIVE
    └── Old / Replaced Files
```

NAMING CONVENTIONS

- ☐ Use YYYY-MM-DD for dates where helpful
- ☐ Use clear project or campaign names
- ☐ Add v01, v02, FINAL only when versioning is necessary
- ☐ Avoid vague names like final-final2-new
- ☐ Keep source files separate from approved deliverables

EXAMPLE FILE NAMES

- 2026-08-21_Client-Kickoff-Notes.docx
- 2026-09_Content-Calendar_v02.xlsx
- Landing-Page_Copy_APPROVED.docx
- Monthly-Performance-Report_2026-09.pdf