

What is a Tickler File?

A Tickler File is easy to set up and when used, is the most effective must-have tool available to keep your future-dated documents manageable.

Imagine having a home for all the papers that you keep to remind you to take some action in the future. Travel - airline tickets, itineraries, checklists; Meetings - directions, agenda, support materials; Bills - stop being charged late fees; To do's - projects or just about anything that needs to get done on a particular date.

And also imagine what it would be like to put a paper or important document away and then on the right date it would automatically show up to remind you.

A Tickler File allows you to send something to yourself in the future for later action. It works up to a year in advance. It is a combination of a reminder system and a method of making documents available at a particular date in the future.

A Tickler File is essentially a simple file system that allows you to store paper and other physical reminders and support materials that appear on the desired date in the future. You can be assured that filing something in your Tickler File can be forgotten until you need it.

This system has been around for many years because IT WORKS! If you have heard of a Tickler File, but think it won't work for you, think again. I've adjusted it so that it is much easier to maintain. Here's my version of how to set it up and use it ...

Setting up a Tickler File

The first step is to choose an appropriate location for this file system. You want it to be as accessible as possible - otherwise you'll be tempted to start keeping files and documents on your desk again. If you have a file drawer in your desk, then that's the ideal location. If you are lacking that drawer, then a portable filing box will also work - just make sure you don't need to physically get up and move to get at it.

There may be a tendency to resist putting 'active work' in a file drawer, but if you understand that the drawer is not purposed the same way as your reference files, you'll soon come to love the idea of putting away work-in-progress.

If you absolutely cannot bear the idea of putting WIP into a drawer, then get a table top file box to keep your system in.

Supplies needed:

12 hanging files

12 file tabs

A sharpie or label maker

Setting up & using a Tickler File

Okay, here we go ...

Label your file tabs January through to December – one for each hanging file – and attach it to the front of the hanging file. The reason you do this is so that the label doesn't get hidden by the papers and stuff you'll be putting in there. Another reason is you can grab the tab and pull it towards you thereby opening up the file. This may eliminate those frustrating misfiling of documents.

Arrange the files like this: place the **current** month at the front followed by the other months in consecutive order. This example shows that May was the current month at the time the photo was taken.

Voila!!

Now, let's start using it ...



Process your tasks by determining the due date then placing the file/document into the appropriate Tickler File Folder.

There's one more step before you move on to the next one – you also need to schedule appropriate time in your calendar to get the work done. Otherwise, you may find that you are getting to the end of your day and you still haven't 'found' time to work on the Ticker File items.

Whenever I put something into my calendar, I will make note that I have a document in my Tickler File. I simply used the initials TF – that's my clue that I need to retrieve it.

At the end of the month pick up the expired Month Folder and move it to the back of the system so that the current Month Folder is now the first folder you see. This is the part I love ... by physically moving it, you can catch any stray papers that may have been missed along the way. Reschedule them, and put them into the current month folder.

That's it. Easy huh?

What kind of things can you put into a Tickler File?

Here's just a small sampling of what you can use this system for ...

Bills

Never pay late fees again. Place your bills in the Tickler File on a 'pay by' date, allowing sufficient lead time for processing and mailing.

Time sensitive documents

Reports, forms and other time-sensitive documents can be easily managed by placing them in the folder when you want to take action on those items. For reports that need to be done on a standard cycle, put a blank form in the folder to remind you on that day. Re-file the reminder for the next one.

Travel documents

Not only can you store your travel tickets, but you can also store supporting documents for your trip. Items such as hotel and car rental information and confirmation numbers, maps, directions and even your passport.

Meeting preparation information

Keep track of client meeting information such as agenda, directions, support materials and even who you will be meeting with. Prepare a packet in advance with all the appropriate info.

Follow-up

Stay on top of delegated actions or other things that you don't want to forget to do. Often when we delegate something to another person we expect that they will do it, but in reality, they might forget about the request, or not consider it a priority. Your Tickler File acts as a follow-up reminder system. It allows you to monitor the progress of a delegated task.

Reminders

Stuff like set/review goals, call a relative, clean files, back up computer data, etc.

Tickets and invitations for events

Put tickets to that concert, sporting event, etc. in the day prior to the event. Make sure you schedule it in your calendar too.

Birthdays and anniversaries

Create an index card with each person's name and birthday then place it in the appropriate month folder. An advantage of using cards is you can record a note of what you gave or did for that person's birthday to avoid the embarrassment of repeating last year's gift.

and much more ...

Don't let this list limit you. Use your imagination! Unsure of where to put something? Use your Tickler File. It will soon become your go-to place for those papers that you can't seem to remember where you may have put.

You can use this system at home too!

In order for the system to work ...

Use it. Add to it. Keep at it until it becomes a reliable tool for you. If you let it slide and forget to use it, then you won't trust the system to handle important information.

If that happens then you'll have to go back to your old way of managing your active documents – probably by making unidentifiable piles on your desk. And your Tickler File will just turn out to be another thing that takes up valuable space in your office.

Easy to use and keep up? Yes! It's also easy not to do it.

Take the time to set it up and develop the habit of using it on a regular basis. Before long, you'll wonder how you ever managed to work without it.



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