



## The Tickler File

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This is an organizational tool which can be used to simplify the tracking of date-related items and to manage work flow.

It works well as an adjunct to personal planners and calendars, allowing them to be used for streamlined focus on items that require on-going review and access.

### How It's Set Up

It consists of file folders (letter or legal size) - 31 daily files are labeled "1" through "31" and twelve monthly files are labeled with the months of the year. (See diagram on page 4.)

The daily files are in the front, beginning with the files for tomorrow's date (if today is October 5, then the first file would be "6"). The succeeding daily files would represent the days of the rest of the month ("6" through "31"). Behind the "31" file would be the monthly file for the next month ("November"), and behind it would be the daily files "1" through "5". Behind that would be the rest of the monthly files ("December" through "October").

This means that the next 31 days (October 6 through November 5) are represented in the front of the file; and behind that are files for the next twelve months.

The next daily file is emptied into the in-basket every day, and then re-filed at the back of the dailies (now instead of October 6, it represents November 6).

In the same way, when the next month file reaches the front (on October 31 the "November" file will be the next one, with the daily files behind it), it will be emptied into the in-basket and re-filed at the back of the monthlies, to represent November a year from now.

This is a "perpetual" file - at any time it has files for the next 31 days and the next twelve months.

### How It's Used

Documents, notes, reminders of all sorts can be directly filed to automatically trigger action and/or review when needed, without loading up daily planners or getting lost in miscellaneous storage.

If you want to be reminded to handle something in the future, but don't want or need to think about it until then, it can be "tickled" to show up exactly on the day or month you'd like to see it again.

The advantage of using file folders (instead of the old sales tickler system of index cards or even your calendar) is the ability to store the whole document or piece directly into the file (the actual form that needs to be filled out, the memo that needs reviewing then, the telephone note that needs action on a specific date, etc.)



### Some Sample Uses

1. Regular reports that need to be done on a standard cycle, e.g., weekly, monthly, quarterly. Put a “dummy” or blank form in the file for the day/ month it needs to be handled, and continue to re-file it as a reminder for the next one. Status reports, evaluations, payroll taxes, etc.
2. Contact follow-up that should be acted upon after a certain period of time but which don't need tracking until then. Calling a prospect after their fiscal year begins, requesting feedback after someone has had time to review a product or materials, calling someone after they're going to return from trip, etc. ·
3. Reminders to do regular activities, such as: set / review goals, wax car, review someone's performance, call a relative, clean files, back up computer data
4. Track cyclical financial matters, such as: pay rent, do taxes (file your 1040 in “January”), prepare statements, review assets, review investments
5. Manage cash flow. Tickle bills to pay for appropriate time periods (maximize cash flow, prevent overdrafts, etc.)
6. Review “maybe” actions. For instance, you may get a direct mail ad for something you might want, but cant decide about right now. Tickle the ad in our file to show up a week later, when you might be clearer about it (or for when you think you can more afford it!)
7. Follow up on delegated actions.
8. Ensure follow-up on orders/requests through the mail. (If it says “six weeks for delivery”, tickle a note [or the catalog, or ad] for review when you'd want to check on it, if it hasn't been received).
9. Manage work flow. This is particularly useful if a special project needs all of your attention, or if you're going out of town. Determine the next functional day you can be available to handle “regular stuff” at your desk; and empty your tickler file in your in-basket up to that date. Then review all of the papers, notes and to-dos on your plate. Everything that can wait until that future date you'll tickle in that file, to show up after you can return to your normal routine. Everything that can't wait should be put in front of you and handled now before you start on the project or leave town.
10. Storing tickets for concerts, theater, etc. Tickle them for the day before you need them, so you can then have them with you. In the same way tickle flyers for events that have directions, instructions, etc.
11. Ensure periodic enjoyment from inspirational writings, jokes, or whatever you'd like to see again. In general, use it for everything that inspires you to say “I'd like to be reminded of that again” but you don't have a place to put it.



12. Reminders of birthdays, anniversaries, etc. Tickle for appropriate lead-time to get cards, presents, arrangements made.

13. Reminders of warranty expirations. Tickle for lead-time to get covered services and repairs if needed.

[Slice of life: some real things in my tickler file --DA]

- Amtrak ticket for the day I need it
- Web printout of a piece of software I might want - don't want to decide about it for a couple of weeks
- Fax of program agenda and directions for a seminar I'm conducting
- Inspirational pamphlet (to read monthly)
- Hotel confirmation fax
- Store receipt for an item shipped home from another city
- Confirmation letter of closing an automatically billed account (Checkfree) until next statement to verify
- Inspirational postcard I wrote myself from a spiritual retreat
- One-year reminder about from when I started wearing arch supports (manufacturer suggest getting refitted yearly)
- Agenda for a meeting which includes a speech I'm giving
- Stuff I don't have time to deal with until I'm back from my next trip
- Workbook to edit, for 3 weeks ahead of the next seminar, for capturing all the edits between now and then
- Canadian money for the day I'm leaving for trip to Canada
- A letter and brochure about a book in which I've contributed a chapter, announcing it's launch several months from now

In order for this system to work...

1. Keep it updated every day. If you let it slide and forget to empty the file every day, then you won't trust the system to handle important data. You'll then have to manage those things some other way, and the tickler file will turn out to be more of a nuisance than a help.

If you leave town (or don't access the file on the weekend) then you must keep it reviewed ahead of those days. Some people prefer to have secretaries or assistants maintain this file for them.

2. Don't store data or documents here which you or others may need access before the date filed. Tickle a copy, or a note saying "pull the X file" when you want to see the material again.



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Set up on October 5

