

What is a Tickler File?

A productivity tool that enhances personal effectiveness and acts as an action management file. The use of the tickler file has become huge since productivity consultant, David Allen, refreshed the concept and usage in his best-selling book *Getting Things Done*. While the tickler file is not a one-stop comprehensive system for personal productivity, it does handle time-sensitive items that tend to pile up on your desk and it's a great tool for managing daily workflow.

A tickler file consists of 43 folders: **12 folders for each of the months of the year** and **31 folders for each of the days of the month**. A tickler file system is not designed to be a stand-alone reminder system, but serves as an adjunct to your paper or electronic-based planners and serves as a place to store supporting documents that cannot be stored in electronic or paper-based day planners. When used correctly, a tickler file system is uniquely capable of handling the amorphous paper "stuff" that doesn't seem to go anywhere except in your overflowing in-box or in one of the many growing stacks of paper on your cluttered desktop.

The best "in a box" tickle files systems available is known as the *Swiftfile* available at Simplified, LLC or , you can create your own using file folders and a standalone file folder holder or file space in your desk drawer.

How to use a Tickler File

Use the monthly (**January—December**) folders to file documents for a particular month for which you don't have any assigned day. As an example, on April 10th you receive a confirmation document for a business training scheduled for Friday, May 12th from 1:00-4:00 p.m.

- Enter the training in your paper/electronic planner system
- Place the confirmation document in the **May** Tickler file folder
- At the beginning of May as you review all the documents in the **May** folder , move the confirmation document to the day folder labeled "**12**"
- On May 12th as you pull and review all the documents in that folder, the confirmation document will be available and ready to take to the training that afternoon.

Tickle File Uses:

- **Provide Fail-Proof Reminders** to pay bills or follow up on delegated actions, order and requests.
- **Travel Documents:** Travel tickets, hotel confirmations and supporting documents
- **A Non-Electronic, Perpetual Birthday/Anniversary Reminder System:** Purchase or write your cards in advance and place in the folder on the date you wish to mail them out on.
- **Store coupons or Claim Tickets** for dry cleaning, film, prescriptions
- **Homework:** Students can use the power of the tickler file system to manage homework and term papers due on a specific date. Place supporting material and assignments that need to be worked on a particular day in the specific day folder and handle assignments proactively.
- **Support Material for Medical or Legal Appointments**
- **Product Warranties:** Prompt you to check the product prior to warranty expiration
- **Maintenance Reminders** for car, lawn care, even annual health/dental exams.
- **Provide ideas or as a motivational tool:** Collect bits of wisdom, motivational quotes, or positive affirmations, places you wish to travel or visit or ideas you wish to explore on an index card and place those cards into folders for periodic review

Some rules of the Tickler File Road:

1. Keep your tickler file system near you; within arm's reach and, (ideally) visible where you can access the system quickly when processing paper workflow. This is particularly important when you first begin to use the system. You might want to use your day planner to enter an appointment to yourself such as "*check tickle file*" for the first week or two – develop a habit to check your tickler file each morning or at the end of your workday when preparing for the next day
2. If using a file holder/case don't skimp! The case needs to be slim enough that the folders rest comfortably upright, but not so thin you can't place anything in them; a width of around five inches works well for most people.
3. Unless you need a system that is compact and portable developing a tickler system with hanging folders in a file drawer works well. Caution: if you are a visual/tactile learner this **may not** be the best option for you as the old adage "*out of site out of mind*" may nullify the effectiveness
4. **Capturing Info:** Index cards or paper from your recycling box are perfect for capturing notes, thoughts, and next action items, placing them in the folder on the day you

need/want to take action.