

Using a Tickler (1 - 31) File

By Meggin McIntosh, PhD, The PhD of Productivity™

There are many things I could live without....a tickler file is not one of them (at least not if I intend to continue being productive). The "tickler" or 1-31 file has been around for many years. The numbers 1 - 31 correspond, obviously, to the days of the month and the items you place in this file are meant to "tickle" your brain into doing something with those items.

Here are ten ideas for using your tickler file for enhanced peaceful productivity.

1. Get or prepare a tickler file.

You may choose to have 31 manila or colored folders labeled with their numbers, 31 hanging folders labeled with their numbers, an accordion file with 31 slots that are already labeled, or what I'm currently using, a Swiftfile. Have a tickler file for your home as well as your workplace.



Note: If you work primarily out of your home office and live alone (or with someone else who depends on you to remember everything anyway) then just one tickler is plenty. That's how it is at my house ☺.

2. Put your tickler file where it is easily accessible from your main desk or workstation. If it is tucked away somewhere, you won't use it. Remember the ABCD concept for organizing your workspace? The tickler file needs to be in your "A" or a very accessible "B" area.
3. When you are processing your physical in-box and you determine that an item needs to be handled on a certain day, drop that item or a reminder piece of paper into that day's slot or folder. If the item is very small (e.g., a receipt, post-it® note or other small item), staple or tape it to a larger piece of paper.

4. **Get in the habit of putting agendas, e-tickets, hotel confirmations, etc. into the day's numbered slot or folder on which you will need them.** As you use your tickler file more and more (and trust it), you will feel a sense of relief when you get ready to go on your tip and you find all the documents you've been mailed or have downloaded right in the tickler file - on the day you need them. For your family, you can put tickets you've purchased to a spaghetti supper or a play or the band concert right into the tickler file and then when you get ready to go - there they are! No worrying and scurrying is necessary! Peaceful productivity, indeed ☺
5. If you prefer not to mail in your bill payments sooner than necessary, **put bills in your home or office tickler file on the day they should be mailed.** There's no need to have them cluttering up your desk space or counter.
6. If you prepare birthday, anniversary, or other holiday cards at the beginning of the month, **drop them into the slot for the day you want to mail them.** Friends, family, and colleagues will be impressed with your care and timeliness. And you will be grateful you have a good system to help you show that you care about others.
7. If you are going to be out of town for a day or more, then **go through the upcoming folders or slots to ensure that you have everything you need** while you're out of town. It's wise to check the slot for the day *after* you get back, also. Make sure you know what's coming up...and then, just in case....
8. If you find that you cannot come into the office, **call someone, ask him/her to pull everything out of the day's slot and go through it with you.** You will be able to tell your colleague what needs to be handled and what can wait until your return. This is a benefit of the tickler file that surprises so many people. It's great for people who have children who get sick unexpectedly or for those who live somewhere that the weather can keep them from getting to work



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unexpectedly, etc. Or...if your travel plans are interrupted and you're still in an airport instead of in an office. It happens, doesn't it?

9. Special note to teachers: **Put copies of tests in your tickler file for the day you're giving the test.** This will keep the test out of students' sight but readily accessible for you. A sub can find them if you must be absent. Obviously, keep this practice private.

10. Check your tickler

file as the last act of every day or as the first act of every morning. Make it part of your routine. A day doesn't end without taking everything out of your tickler file for the next day (or doesn't start until you've done so).



Note: Some items need to be handled in upcoming months, not in the current month, so you will need to have January - December files as well. You'll learn how to use these as part of your tickler system in the next Top Ten Productivity Tips. Just turn the page....

From the Top Ten Productivity Tips - The Collection (Original Series)

<http://toptenproductivitytips.com/products.php>

Using a Tickler (January - December) File

By Meggin McIntosh, PhD, The PhD of Productivity™

In the first part of this special report, you received ten ideas for using a (1 - 31) tickler file. In this set of tips, we will extend that idea for the other tickler files you need, i.e., January - December. There is a simple reason why you need both types of tickler files: Some of the items you need to "tickle" or remind yourself of correspond with the days of the month you are currently in (and that's when you use the 1 - 31 file). Other times, however, you have items that are for upcoming months and you need a place for those.



Here are ten ideas for using your *monthly* tickler files for enhanced peaceful productivity.

1. **Get or prepare your tickler file.** It may be 12 folders labeled with the months, 12 hanging folders labeled with the months, an accordion file with 12 slots that are already labeled, or whatever works best for your area. Wherever you have a 1-31 tickler file, you will want to have a corresponding monthly one, as well.
2. **Put your January - December tickler file where it is easily accessible from your main desk or workstation.** It will be near your 1 - 31 file since you will be working with the two of them together much of the time.
3. When you are processing your physical in-box and you determine that an item needs to be handled in an upcoming month, **drop that item or a reminder piece of paper into that month's slot or folder.** If the item is very small, staple or tape it to a larger piece of paper. You might also put it in a plastic sleeve (which you can buy from Ultimate Office (www.ultoffice.com)). These are in my top ten favorite products, I'd say.

4. **Get in the habit of putting agendas, tickets, invitations you will need for entry, etc. into the month's slot or folder in which you will need them.**
Often, you get documentation or other materials that you need in future months. Without a tickler system, this material can get lost or ends up just being clutter on your desk or on various shelves or other flat spaces. If you aren't going to need something until July, put it in July's folder. If your cruise documentation has arrived for next December, put it in December's folder. It will be there if you need to reference or access it for any reason, but otherwise...it's safe and sound and not cluttering any spaces.
5. **If you have certain quarterly responsibilities (e.g., paying quarterly taxes, changing the air filters in your house, or sending progress reports from school, drop a reminder into those months regarding the responsibility or task.**
Each month, when you complete the task, you can then move that same reminder info to the next month when you have to do the same task again. For example, my company pays certain fees and taxes every quarter so when we complete the task in April for the first quarter, we just move the folder to July so it reminds us to handle the second quarter.
6. **Buy greeting cards for the year when possible and then drop the cards into the corresponding month. For special holidays, buy cards for next year during this year's season. [You might avoid having to do what my husband did one year...giving me a "to my favorite niece" Valentine card.]**
7. **If you have a trip or a presentation in an upcoming month, create a folder for that event to keep within the monthly tickler file.** As you get your plane ticket, agenda items, hotel confirmation, notes for meetings, on-line info about sites you want to see, ideas for your speech, etc., just keep putting everything into that folder. This is one of the reasons that I recommend having hanging box-bottom file folders for your monthly tickler files. If you find you have so much being added to the folders that it's bursting out of the top of the file, then get the box-bottom folders that will hold up to 3 ½" worth of paper, folders, or other documentation.



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8. When you contact someone to come speak to your local civic group, and the person indicates that she "won't be available until 3 months from now, but you should call then," drop a reminder to call her into that month. Remember, **it's called a tickler file to remind you to do things...and it works!**
9. **Yearly items such as scheduling a mammogram or taking your car in for a tune-up should be in your January - December tickler.** There are many purchases that you make each year that "automatically renew" for your convenience (or for theirs!) If you want to think through whether you have something automatically renew, put the print-out or the receipt in the month prior to the renewal month so that you can consider whether you want the software subscription, magazine subscription, or service contract to renew. It will save you money and time.
10. **Two or three days prior to the end of a month, take everything out of the upcoming month's folder or file.** Determine what day it belongs in for the upcoming month (and then put everything into the proper daily "slot" or folder. It is an excellent way to think through responsibilities and tasks and to get an overview of your month.

You won't believe the peaceful productivity that will come into your life as you use the 1 - 31 and the January - December tickler files. You deserve it!



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