



Creating Blueprints for Purposeful & Productive Lives

www.OrgCoach.net ~ 425-881-6627 ~ Kathy@OrgCoach.net

Setting Up Your Customized Tickler System...

WHY YOU NEED ONE:

A tickler file gives you an alternative to “I’ll just set it here for now!” when you have something that requires you to take action, but you either don’t have the time right now or you choose to do something else now and handle it later.

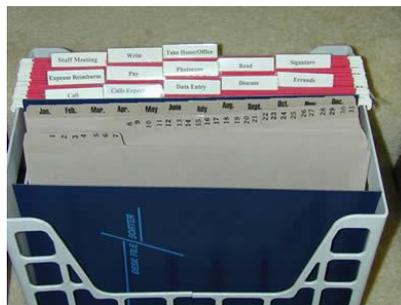
A good tickler system requires you to do two things in order for it to work. You must (1) put things in and (2) take things out! If you don’t get in the habit of doing both, it won’t work. I will teach you how to set up a customized system that will work for you for many years to come...IF you get in the habit of using it.

If you have not participated in my Buried in Paper webinar, I encourage you to watch it. This 48- minute webinar will teach you how to set up and use a tickler file system. You can register for this free webinar by going to www.OrgCoach.net and looking under the Resources menu for Webinars.

As you get your tickler file system set up, here are some suggestions...

TOOLS NEEDED:

- I recommend that you purchase the 43-tab accordion [Smead Desk File/Sorter, Daily \(1-31\) and Monthly \(Jan.-Dec.\)](#). Many office supply stores do not carry this, but you can purchase it on Amazon at the link above. This one costs less than if you buy separate ones for the months and days of the month.
- You will also need some [hanging files](#) and the plastic tabs for labeling the customized files you will create for non-date-sensitive repetitive actions you take regularly.
- If you purchase a [desktop file box](#) to contain your tickler system, make sure it is at least 8 inches deep (the 6-inch-deep ones at the office supply stores are not deep enough). If you work a lot from your car, you may want a [portable file box](#). If you do not want your tickler file in plain view, you can use an empty desk drawer to contain your tickler file system. I do NOT recommend storing the accordion file flat on a surface. Below is a picture of a tickler system in a desktop file frame.



GETTING STARTED

As you go through the piles on your desk, when you get to items that require you to take action, but you don't need to do it right now, you can place it in your tickler file for future follow-up. Some items will be **date-sensitive** and some will be **repetitive actions** you need to take, like paying monthly bills.

Create customized action files sparingly, as they are not date-sensitive and can be easily forgotten for follow-up. Here are some examples. As much as possible, you want to use verbs, since these are actions you will be taking:

- **Pay** – a place to put your bills until they are paid
- **Expense Reimbursement** – if you get reimbursed by an employer for out-of-pocket expenses, this is a place to store the receipts until you fill out and submit the reimbursement form. You might also store the form in this file so everything you need is in one place.
- **Data Entry – Contacts:** A place to put business cards and voice messages containing contact information that needs to be entered into whatever contact management program you use.
- **Data Entry - Financial:** A place to put income and expense info to be added into whatever financial management software you may use (QuickBooks, etc.).
- **Data Entry - Donations:** Keep your receipts here until you have time to enter the data. I recommend a program called ItsDeductible (works with TurboTax Deluxe to produce the tax schedule you'll need if you donate more than \$500 of in-kind contributions like household items and clothing). Visit www.ItsDeductible.com for more info.
- **Discuss** (labeled with the name of a person you meet with regularly) - A folder to put notes in for weekly meetings with the same person or group, or if you meet with several people/groups weekly, you may have individual folders with their names on them.
- **Meetings** (labeled with the name of the group or committee you meet with regularly) - A folder to put agendas, support materials, or notes to yourself about something you want to discuss at a meeting. This folder is only for ACTIVE papers. Historical meeting papers go in your filing system.
- **Waiting to Hear** -- A folder to put notes in for calls you are waiting for, papers you need to refer to when someone calls you back, etc. Make a note in your calendar to check this file weekly so things don't slip through the cracks. If something is date-sensitive, rather than using this folder, I suggest you place it in the accordion (dated) part of the file system for when you need to follow up with someone if you have not heard back from them.
- **NOTE:** I do NOT recommend a To Read file. It's very easy to put things in there and never take them out again! Place your *essential* reading material in your tickler for the *date* that you plan to read it, and then carve out the time to do it. OR schedule it for when you will have idle time (like travel on an airplane, light rail, etc.). For non-essential reading, create a reading basket. If you do not get around to reading materials in there within a few months, toss or donate to charity. Unsubscribe from things you find you don't ever read!

MAINTAINING YOUR SYSTEM:

- I suggest having an inbox where mail and other incoming things (messages, thoughts in your head about things to do, requests from others) are placed until you have time to process it. When you process the contents of your inbox, you NEVER put things back. You either toss, delegate (or give to someone else), do it right then, file it for future reference, or place it in your tickler system for WHEN you are going to do it.
- If it's something that requires you to take action, here are two questions to ask yourself:
 1. **What's the NEXT ACTION I need to take on this?**
 2. **WHEN am I going to do it?** Place it in the tickler file for when you need to look at it next or what you will do (like Pay).

- Keep a 12-month calendar next to your tickler file so you can see what day of the week a date falls on. For example, if you want to take action next Tuesday, and that is the 19th, you put it behind the tab for the 19th in the dated part of your tickler file.
- At the end of each month, you need to move the next month forward into the 1-31 tabs, so the **dated tabs always reflect the current month.**
- If you are concerned about forgetting to check your repetitive action files (such as PAY), identify when during the month you want to do this activity, and then add a reminder to your calendar (if electronic reminder, you can even add an alarm to it). The appointment in your calendar might say “PAY BILLS” or “ENTER CONTACT DATA. This will jog your memory to check these files. If you want to pay bills twice a month—let’s say the 10th and 25th of each month—place manila folders in the To Pay file—one for the 10th and one for the 25th—and place reminders either on your calendar or in your tickler file on those two dates to remind you to check your To Pay file and take the necessary action.
- If you have a "project" (something with several steps required), write all the steps on a sticky note, in the order you need to take each action step. Then you can check them off as you complete each step. File the item in your tickler file for when you intend to take the *next* action, or schedule the activity in your planner. When you have taken that step, check it off the list and re-file it in your tickler for when you will take the *next* action step on the check-off list.

NOTE: For recurring projects, create a template form so you don’t have to reinvent the wheel each time. For example, if you present a lot of seminars, you know that there are some basic tasks involved with planning one – selecting the date and time, securing a venue, inviting people, setting up a registration process, what to bring to the event, etc. A template will help you remember all the details.

If you have questions, e-mail me at kathy@OrgCoach.net.

Happy Paper Taming,

Kathy

Kathy Paauw
Productivity Coach