How to Construct and Use a Tickler File

Have you ever filed a piece of paper so well that you hid it from yourself? "I just wanted to put it somewhere safe," you explain. Many people are unsure where to keep important papers. If you pick up a piece of paper and say to yourself, "I need to act on this, but not for two more weeks," you don't want to file it, do you? What would happen then? You'd forget to do it! Out of sight, out of mind.

Where do you put a meeting agenda for a meeting two weeks away? Where do you put an invoice so you remember to pay it in three weeks? Where do you put those plane tickets you don't want to lose? Where do you put the birthday card (that you managed to buy on time) so you remember to send it? If you're like most people, you put it on your desk! Where you can remember it. Where the piles can grow as if you poured fertilizer on them. So what can you do instead?

Bad habits

First I'll tell you where *not* to put an action item. You don't want to file it in your permanent files, because you'd forget to take action. You don't want to put it in a stackable tray because "out of sight" becomes "out of mind." You don't want to carry it around in your organizer for two months because you become weighed down by paper. You don't want to tack it on your bulletin board because soon you'll become blind to it and forget it's there.

You need a system that will remind you which papers require your action *today* and allow you to *forget* the rest until their time. What's the answer? This indispensable system is called a **tickler file** (also called a calendar file, a bring-up file, a suspense file, or a pop-up file).

A tickler file reminds us about items needing our attention each day. Think of it as a calendar for paper. Compare it to a well-managed, well-sorted in-basket. It contains papers that are pending, need your attention, or require you to act in some way—papers you can't toss, delegate, file, or work on right now. Your tickler file stores what *would* have been piles sitting on the desktop, the credenza, or any other surface.

Here is the procedure for creating one:

1. Obtain 43 hanging (Pendaflex) folders. Label 31 folders 1 through 31 for the days of the month and 12 for January through December. Hang them in an accessible file drawer, a file box or container, or an expandable file. The only requirement is that it is close to your work area. Put the numbered folders behind the current month,

similar to a calendar. The current month is the first folder, and the current day is the second folder. The rest hang in order. For example, on March 15, your file would look like this, front to back:

March
>
> **15**
>
> **16...**
>
> **31**

April
>
> **1**
>
> **2...**
>
> **14**

May...

February

2. File any papers that are pending or require your action (assuming the above arrangement):
   - A conference registration ticket for June 3 would be filed in the June folder (months act like holding files for anything further than 31 days out).
   - Plane tickets for July 4 would be filed in July.
   - A printed email message requiring your action next week would be filed in the appropriate day.
   - A meeting agenda for March 20 would be placed in the folder marked 20.
   - A copy of a written delegation item due March 28 could be filed in the folder marked 24 to remind you to follow up with the person.
   - A birthday card for April 11 would be filed in April 7 or 8; a birthday card for April 18 would be filed in the April file.
   - An invoice due on March 31 could be filed in March 25 or 26 (or, if you pay all your bills at the same time, the bills would all go together on the date you want to pay them).
   - A return merchandise slip could be filed two months out so you remember to compare it against your credit card statement.

When deciding where to file papers, always ask yourself, "When do I need to see this item again so that I can complete it before it's due?" Don't file items on the day they are due unless you can do it that day! Some items have fixed deadlines; others require you to pick the next action date. If you have an item that qualifies for the calendar file but is too big, put a note in the file that refers to the location of the material, such as on your bookcase or in a file cabinet.

3. At the end of each day, plan for the following day. Before you leave work or before you go to bed, take out the folder for the next day. For example, on March 15, you would remove the folder marked 16. Take out the contents and refile any papers you're not going to get a chance to do. Move the empty folder behind the next month. Record the tasks on your to-do list. Put the papers in a "priority tray" (not your in-box) on top of your desk. At the end of the day, reevaluate any paper left in the priority tray, and refile in the calendar file. On the last day of each month, review the next month's folder and sort the contents into the numbered folders.

Putting the tickler to use

A tickler file is the single most important thing you can do to organize your papers (e-mail systems will be discussed in Chapter 8). It allows you to pace yourself better, eliminates piles from surfaces, and keeps all your reminders in one place. After you adjust to it, you gain confidence that items filed out of sight will pop up again.

Customize and tailor the contents to fit your individual needs. Find a system that works for you. For example, you can use two calendar files (one at work and one at home), or you can transport personal papers from home and incorporate everything into your work file. Frequent travelers can use an expandable accordion file that fits in a briefcase.

The biggest thing you can do to goof up a tickler file is to forget to look in it! Purchase a page-a-day cartoon calendar and put one cartoon in each daily folder. Each day, post that day's cartoon. If you notice the cartoon isn't current, you'll realize you've forgotten to check your tickler file.

Make it a productive day! ™

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