



The
Concierge Academy™

Tickler File System

What is a Tickler File system and WHY should you use one??

Simply put, any SYSTEM that is instituted in your business and carried out consistently will increase your productivity, efficacy of action and improve profits!

Instead of seeing yourself and results as a system of circumstances, lost in the day-to-day undertakings of your business, be focused and responsible for instituting the necessary systems in your business that will breed productivity, discipline and growth!

A tickler file is simply a reminder system intended to act in combination WITH your regular calendaring and scheduling system.

Although there are several different kinds of tickler files, the one I'll be teaching is one I personally created so that I could track marketing efforts, called a *"Marketing Tickler System"*.

A marketing "tickler file" can track your previous contact methods and results for each contact, as well as reminding you when it is time for another contact.

The idea is really simple and even easier to implement. The struggle is making sure you USE your New Marketing Tickler System.

How to Create a Marketing Tickler File System:

- Choose or Purchase a Filing Cabinet that will fit your needs
- Place your filing cabinet close to you IN your office or where you do your daily “work”
- Choose Hanging File folders
- Label each Hanging File Folder WITH the Months (Jan-Dec)
- If you MUST: Leave a desk TOP file box ON your desk ☺. THAT will be sure to stare right back at you every day!

What goes into the folders is TRULY up to you, but these are the things that I have put in my **MTFS (Marketing Tickler File System)**. This is a GREAT basis to start with and you can use or modify the system to work BEST for you.

Many of your marketing ideas are not something you will immediately implement. By using a Marketing Tickler File System, you will retain those great ideas and have access to those ideas when you need them the most.

This is a specific place for your notes on ideas you have, ideas from magazines or online and anything else that captures your attention. Stumble upon a blog post about Back to School planning, but it's March? Print it out and PUT it into your MTFS!

That's how to make it work FOR YOU ☺

What to Put IN Your Tickler System: (a sampling)

- Monthly warm letter
- Monthly or Seasonal Appropriate flyer or marketing materials
- Reminders to “follow up” with prospects/leads
- Cards to be mailed for Client Birthdays
- Cards to be mailed as a Thank You or acknowledgement
- Ideas for upcoming Promos relevant to THAT month
- Any other items you know you will need at any specific time
- Any ideas you want to “track” and NOT forget about for the FUTURE
- Put one sheet of paper in each month and use it to list all follow-ups that need to be done for that upcoming time frame (this is NINJA).

The hardest part about using a tickler file is actually *starting* to use it. **Getting into the habit of placing things into the tickler file, and then checking it every day to get them back out, can take a while.** In fact, you may need to do what I did (and still do at times) when I first started using the MTFS: Set a reminder for your reminders!

I put a “check tickler file” task into Outlook as a reminder so that I would create a new “habit”.

How to make sure you USE your System:

- Set a reminder on your Outlook calendar OR your Gmail calendar
- Make sure your reminder is set DAILY
- Make sure your reminder has an audible “alert” set to it
- Every morning as the notification POPS up, check your file!
- Peaking at your MTFs on your REVIEW and Planning day of the week is a GREAT time to review, and prepare for the marketing needed the week ahead.

Eventually, USING the tickler file WILL become a habit. You will likely add more and more stuff into it, you’ll be more and more likely to check it, and as you check it more and more you’ll be more likely to put stuff into it. These two habits will continue to reinforce each other. 1) Using the system and 2) Putting necessary pieces INTO it.

Used consistently, a tickler file can become an important part of your “outboard brain”, popping stuff up for you when you need it, and keeping it out of the way when you don’t. In today’s all-high tech all the time world, it’s even a little reassuring: simple, decidedly low-tech, and SUPER effective!!



As a BONUS to THIS process there is a deeper more comprehensive Tickler System created by David Allen. In HIS book ***Getting Things Done*** he teaches about the 43 Folder System. In THIS scenario, you need 43 FOLDERS!!

12 Folders for the 12 months of the Year AND 31 smaller file folders for the potential 31 days of the month.

This way you can set up DAILY reminders for EVERYTHING, from paying bills, to concert tickets a month and 2 days from now.

Since I do NOT want to complicate this system for you and **I want you to institute the simplified MONTHLY Marketing Tickler File System**, that is where I want you to FOCUS your time and energy until you create a new habit...

THEN: you can decide to institute the 43 Folders system.

Here is another well-written resource you can refer to:

<https://www.linkedin.com/pulse/12-best-practices-using-tickler-file-meggin-mcintosh>

And if THAT wasn't enough... if you are an OOBBER techy person and prefer to do ALL your work via computer and technology, you can also assimilate the SAME process via Evernote.

I personally find that things "hidden" on our computer are a VAST loss of knowledge and follow through and that's why I am a firm believer in paper is better, but it really depends on the individual...

If you LOVE technology and USE Evernote seamlessly, refer to THIS article:
<http://www.sohotechtraining.com/creating-a-tickler-file-with-evernote/>