Intake & Triage Job Checker

Use these questions whenever you intake work requests. If these can't be answered yet, that's a signal to pause and clarify before proceeding.

What problem are we trying to solve?

- What is happening now that shouldn't be?
- What changes if this works?

If the answer is a deliverable (flyer, post, report), the real problem hasn't been identified yet.

Who is this for?

- Who specifically needs to notice, think, or act differently?
- Who is the primary audience?

"Everyone" usually means the message isn't clear enough yet.

What does success look like?

- How will we know this was worth doing?
- What outcome matters most?

"Getting it done" is an output, not a success measure.

What are the constraints?

- Timeline
- Inputs we do or don't have
- Level of effort or budget available
- Sensitivity, risk, or politics

Urgency without context is not a constraint. Missing inputs often create more delay later.

What's the right level of effort?

Based on the goal and constraints, which best fits?

- **Quick fix** – minimal lift for a short-term need
- **Solid execution** – focused, well-done work
- **Strategic project** – requires planning, iteration, and coordination

If the work is strategic, it's reasonable to renegotiate scope, timing, or expectations. This is where professional judgment lives.

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Effort vs Impact Gut Check

Before starting, pause and ask:

- Is the expected impact proportional to the effort?
- Are we solving the real problem or just treating a symptom?
- Would a simpler approach get most of the benefit?

High effort with unclear impact is a signal to revisit the problem definition, not push harder.

Language You Can Use

Framing matters. These phrases help slow execution without sounding resistant:

- "Before we get started, can we clarify the goal?"
- "Who is this primarily for, and what do we want them to do?"
- "What would success look like from your perspective?"
- "Given the impact and constraints, here's what I'd recommend."

Pushback framed as clarity is part of the service.

How to Use This Tool

- Use it at the start of work, not after problems appear
- Run through it quickly. This should take minutes, not meetings
- Revisit it if scope, timing, or priorities change

If the answers aren't clear yet, it's okay to pause. Pausing early is faster than reworking later.

Why This Matters

- Doing the right work ***first*** saves time ***later***
- ***Clear intake reduces rework and frustration***
- Thoughtful triage protects speed and quality
- Strong ***diagnosis builds trust*** and credibility

Bring your expertise. Think. Improve. Ship.

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