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Intake & Triage Worksheet

Do the right work to do the work right

Diagnose before you execute.

Take five minutes to think through and answer the questions below. Use this when a request comes in and you feel pressure to move fast.

What problem is this trying to solve?

Describe the underlying need, not the requested deliverable.

Who is this actually for?

Audience, decision-maker, or group that matters most.

What does success look like?

How will we know this worked? What should change?

What are the constraints?

Check all that apply, then clarify.

- □ Time
- □ Budget
- □ Capacity
- □ Platform/format
- □ Political/interpersonal
- □ Compliance/approval
- □ Other: _____

What level of efforts fits the need?

Check one.

- □ Quick fix
- □ Solid execution
- □ Strategic project

What do we still need to know?

Name at least one missing input.

Intake decision

Check one.

- □ Proceed as requested
- □ Adjust scope or approach
- □ Pause and clarify
- □ Recommend an alternative

Reminder: Bring your expertise. Think. Improve. Ship.

SAVE THIS to make better decisions, focus your effort, and boost your impact.
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