



THE PLAYBOOK

The Triage

Building a communication system for a whole company, not just one inbox. Where requests enter, how they get sorted, and who never has to see them.

Paul Prado Pacardo

Executive Assistant & Operations · me.kabuhayan.app

Contents

Everyone is a switchboard

1 Why everything feels urgent

2 One way in

3 The four destinations

4 Deciding what reaches whom

5 The rules that do the sorting

6 Making it survive contact

7 What the leader must stop doing

Fewer places to look

Everyone is a switchboard

Getting one person to inbox zero is a party trick. Useful, satisfying, and it leaves the actual problem untouched.

The real problem in a small business is that requests arrive everywhere. Email, chat, a comment on a document, a message to somebody's personal phone, a remark in a meeting that was never written down. Every person is a switchboard, everyone monitors every channel, and nobody can tell you what is currently outstanding.

The cost is not the messages. It is that nobody can stop checking. When a request could arrive anywhere, every channel has to be watched continuously, and continuous watching is what destroys concentration in small teams.

This playbook is about the system rather than the individual habit. It is what you build when you have accepted that no amount of personal discipline fixes a problem caused by structure.

It is deliberately unambitious about tools. Almost all of this works with whatever you already have, and the businesses that solve it by buying something usually end up with an eighth destination rather than one fewer.

Why everything feels urgent

Ask anyone in a small company why they are tired and they will describe volume. It is usually not volume. Compare the actual number of daily requests against the exhaustion they produce and the arithmetic does not work.

Three structural causes, and none of them is quantity.

No request has a stated response time, so every one is implicitly immediate. A message with no expectation attached is a message you must handle now, because the alternative is being the person who did not.

Nothing has a visible queue. If a request disappears into an inbox, the sender has no way to know it is in hand, so they follow up. Half the traffic in most small businesses is people checking on things that were already being handled.

Everything looks the same on arrival. A message asking about a client emergency and one asking about the office coffee arrive in identical envelopes and both must be opened to be sorted. The sorting cost, paid dozens of times a day, is the actual expense.

Interruption is not caused by the number of requests. It is caused by not knowing which ones matter until you have already stopped.

One way in

The foundation is a single intake route for anything that is genuinely a request, meaning something that needs an action from someone. Conversation stays wherever conversation lives; requests go one place.

This sounds bureaucratic and does the opposite. Once requests have a home, the other channels stop needing to be monitored for them, and monitoring is the thing that was costing everyone their attention.

Make the route trivially easy. A short form, a dedicated channel with a template, or an address that creates a tracked item automatically. If it is harder than sending a message, people will keep sending messages and they will be right to.

Capture four things and no more. What is needed, by when, why it matters, and who is asking. Long intake forms are abandoned; four fields are answered.

Acknowledge automatically. The sender must immediately see that it landed and where it sits, because that acknowledgement is what removes the follow-up message. Most chasing is anxiety about whether something was received.

Then redirect gently and consistently. When someone sends a request the old way, do it, and reply asking them to send the next one through the route. Six weeks of that changes the habit. Refusing to help until they comply changes nothing except how people feel about you.

The four destinations

Everything arriving is one of four things, and naming them is what allows sorting to happen quickly rather than thoughtfully.

01 Do now

Under two minutes, or genuinely time-critical. Handle it immediately and it never enters any system at all.

02 Schedule

Real work that needs time. It leaves the inbox and becomes a tracked item with an owner and a date. The inbox is not a to-do list and treating it as one is why it feels infinite.

03 Delegate

Somebody else should own this. Route it, tell the sender where it went, and stop holding it. Half-delegating, where you pass it on but keep worrying about it, costs more than doing it.

04 Drop

It felt important and is not. Say so, briefly and kindly, and close it. The unwillingness to do this is why small businesses accumulate obligations nobody remembers agreeing to.

The discipline is that sorting and doing are separate activities. Sort in a batch, quickly, without solving anything. Then work from the sorted list. Mixing the two is what turns twenty minutes of triage into three hours of drifting.

Category four is the hardest and the most valuable. A business where nothing is ever dropped is a business where everything is late, and the difference between those two states is one person willing to say no on the record.

Deciding what reaches whom

Once requests are sorted, the second question is who sees them. In most small companies the answer is everyone, which is why nobody can concentrate.

Write down three tiers, publish them, and hold them.

What reaches the leader immediately. Genuinely short. A client about to leave, a legal or safety matter, something that stops the business operating, a decision only they can make with a deadline today. If this list has more than five items, it is a wish rather than a rule.

What waits for the weekly rhythm. Almost everything. Decisions with a horizon longer than a week, approvals that are not urgent, anything that would otherwise arrive as a message on a Tuesday afternoon and fragment somebody's thinking.

What never reaches them at all. Handled at your level and reported in summary, if at all. This tier should be growing every quarter, and its growth is the clearest measure that the system is working.

THE SENTENCE THAT MAKES THIS REAL

"If it is not on the immediate list, it goes in Monday's brief." Say it consistently for two months and people stop testing it, because they learn that the Monday route actually works and is faster than waiting for a distracted answer.

The same three tiers apply to everyone, not just the leader. A designer who is interrupted for things that could wait until Thursday is losing exactly what the founder is losing, and it is rarely noticed because they are more junior.

The rules that do the sorting

Triage that depends on a person deciding every time is triage that stops the first busy week. Push as much of it as possible into rules that run whether anyone is paying attention.

Route by sender and subject automatically. Client domains, vendors, notifications and internal traffic can all be separated before a human sees them. This alone removes most of the sorting cost, and it takes an afternoon.

Give recurring requests a form and a schedule. Anything asked for repeatedly, a report, an approval, access to something, should have a route that produces it without a conversation. A request that happens weekly does not need to be a request.

Escalate on a rule, not on a feeling. If something sits untouched past its stated response time, it should surface by itself, to a named person, in the place they already look. This removes the need for anyone to monitor for lateness, which is a job nobody was given and everybody does.

Publish response times and mean them. Same day for urgent, two working days for normal, weekly for everything else. A stated response time removes the anxiety that causes people to mark everything urgent, and it is the single cheapest intervention in this playbook.

None of this requires new software. Most of it is rules inside the tools you already pay for, and it is the same afternoon's work that would otherwise be spent evaluating a new one.

Making it survive contact

Communication systems fail in predictable ways, and all of them are recoverable if you are expecting them.

Somebody senior bypasses it in week three. Usually the founder, usually with something genuinely urgent. This is fine once and fatal as a habit, because everyone below them copies it immediately. The repair is to handle it and then log it through the route, so the record stays complete even when the entry point was not.

The queue becomes a graveyard. If items enter and nothing visibly happens, people stop using it within a month. Every item needs a status and an owner within a working day, even if the status is that it waits until next quarter.

The form gets longer. Someone adds a field, then another. Six months later intake takes four minutes and people revert to sending messages. Guard the four fields.

People use it for conversation. Requests and discussion are different things, and a request queue full of chat becomes unusable. Move conversation back out, gently, every time.

A system nobody bypasses is a system that was easier than bypassing it. That is the only enforcement mechanism that works.

What the leader must stop doing

Three habits from the top will dismantle any triage system, and they are all understandable.

Answering everything personally. A leader who replies to every message they are copied on teaches the company that copying them works, and the volume grows to fill their willingness. Being reachable is generous and it is the reason nobody can protect your attention.

Making requests in passing. A remark to somebody in a corridor is a request with no record, no priority and no date, and it displaces work that was properly queued. If it matters, put it through the route like everybody else.

Treating your own urgency as everyone's. A thought at nine on a Sunday evening is rarely a Sunday evening problem. Sending it then makes it one, and the cost is not the message but the expectation it creates that channels are monitored at all hours.

What you get in return is the thing most founders say they want. Fewer things reaching you, arriving in a predictable shape, at a time you chose. That is not a reduction in control. It is what control actually looks like when it is working.

And it makes the rest of the company faster, because the largest single source of unpredictable interruption in a small business is usually the person at the top.

Fewer places to look

The measure of a communication system is not how much gets handled. It is how many places a person has to look before they can concentrate.

One route in. Four destinations, sorted in a batch rather than thoughtfully. Three tiers deciding what reaches whom. Rules that route and escalate without anybody watching. Published response times so nothing has to be marked urgent to be taken seriously.

None of it needs new software and most of it is an afternoon of configuration in tools you already have.

What changes is not the volume of work. It is that the work arrives at a time and in a shape somebody chose, which is the difference between a business that feels frantic and one that feels busy.

Start with the single cheapest intervention. Publish response times, and then honour them for a month. Almost everything else in this playbook becomes easier once people believe that a thing sent through the proper route will actually be handled.

Paul Prado Pacardo

Senior Executive Assistant, Operations and Project Manager.
Ten years supporting C-level leadership. Available for remote work.

me.kabuhayan.app
linkedin.com/in/paulpacardo
pacardopaul18@gmail.com