

Triaging Priorities

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Small Portions.**

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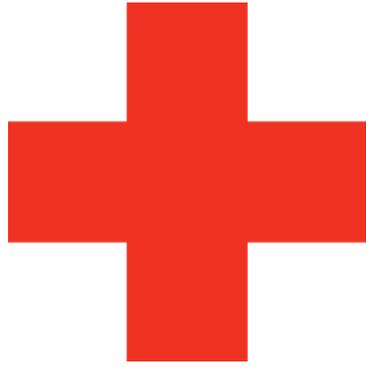
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Nineteenth-Century Wisdom Made Current

The U.S. Civil War was horrific in terms of loss of life. It is estimated that almost 213,000 soldiers died, along with hundreds of thousands of civilians.ⁱ The total death toll amounted to approximately 2 percent of the U.S. population at the time. To put that in perspective, the death toll would exceed 6.2 million people if the Civil War were fought today.

One of the great tragedies of the Civil War was that many injured soldiers were delivered alive to the field hospitals, only to die while waiting to receive medical care. There were a number of reasons for this, including unsanitary conditions, near-primitive medical facilities, and not enough medical professionals to attend to the wounded.

Such was the state of affairs that Clara Barton, who later founded the American Red Cross, encountered when she first began helping doctors care for the wounded that arrived on her doorstep in Washington, D.C., in 1861.

With only rudimentary medical knowledge and experience, Clara Barton would “invent” one of the great medical advances that arose out of the War Between the States: *triage*.ⁱⁱ Those of the Sixth Massachusetts who found themselves under Clara Barton’s care were treated not by their rank or their time of arrival or their color. Rather, they were prioritized (and reprioritized) based on the severity of their wounds—those most seriously injured were treated first.

The result of this now-obvious change in process was enormous. Countless thousands recovered from their wounds instead of dying while, literally, waiting in line.

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Today, many of us find ourselves facing a similar situation: a constant flood of demands for our time and our attention. The result is that we ping-pong back and forth between tasks and e-mails and phone calls and meetings, growing ever more stressed out. At the end of the day, we are exhausted but feel that we've made little, if any, progress.

This is where the concept of *triage* can be of help. Instead of responding to the most recent demand for your time or the demand made in the loudest or most authoritative voice, why shouldn't we focus on the demand that is truly the most urgent from a productivity (move-the-ball-down-the-field) standpoint?

There is a **huge** difference between activity and productivity, and effective triaging will decrease the unnecessary activity and increase our productivity.

Here, we are focusing on how the principles of triage can be a tool for managing workflow and how it can change the rules of the game for staff, managers, and leaders. Along the way, we will share proven strategies for success in leveraging this centuries-old tool in the digital age.

First, we'll explore how triage can help us be more productive and facilitate achieving our goals. Then we'll share strategies for taking advantage of the power of this process to make us productive and effective while mitigating the negative side effects.

Triaging Priorities: The Time-Management Perspective

At its core, triage is fundamentally workflow processing. In the medical context, a predetermined set of principles is applied to a group of wounded to determine the order in which they will receive treatment. The most common and obvious application of medical triage occurs in the emergency room at local hospitals.

As the place-name implies, people in an emergency room need care urgently. The severity of injuries present can vary at any moment, which requires medical personnel to engage in a constant triaging process. In other words, the decision of who gets treatment when is not static. It can change in the blink of an eye. A ten-car pileup on the freeway can result in a long wait for a patient complaining of nausea who was otherwise next in line just moments ago.

The same is true of the modern work world. Technology has made it possible for us to send and receive requests for information, products, time, and materials at near-light speeds. As a result, we do just that.

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We send (and receive) those requests minute-by-minute, hour-by-hour, and day-by-day. This is both good and bad.

The good part is that the speed of information exchange and all its resulting benefits are vastly increased. The bad part is that we feel overwhelmed by the number of requests for our attention, and our productivity suffers. Moreover, we tend to respond to requests based on who sends them and on vague deadlines (such as “ASAP”—more on that below) instead of on which request is the most important in terms of our goals and the goals of the organization.

Does any of this sound familiar? What do you think Clara Barton would recommend?

That’s right—triage! What if we periodically reviewed all the demands for our time and effort and determined what to work on next based on its significance as it relates to our personal and organizational goals? Could the result be as revolutionary as triage’s introduction was during the Civil War?

That might be a bit of a stretch, but developing some kind of discipline around organizing the myriad demands for our time would produce a better result than the current haphazard process most of us use.

Below is a list of recommendations on how to more effectively process and prioritize your workload. Each suggestion is followed by a short description. Following the list of suggestions is a detailed explanation of each one.

Suggestions for Making Triage Operationally Effective

- 1. Develop a Processing Method.** To truly triage effectively, we need a way to categorize each request for information or demand for our time. In the QuietSpacing® method of sifting, all items can be labeled as Trash, Archive, Reference, or Work.
- 2. Regularly Survey the Landscape and Adjust Expectations.** To be truly in command of our work, we must actually exercise that command. A old-school behavior—periodically surveying the workload (morning, noon, and night)—is reinvented for the digital age as the solution.

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3. Do Not Give or Accept Vague Deadlines. ASAP not only doesn't exist as a "when," but is a lazy way of setting a deadline. Those who distribute work owe it to their subordinates to provide clarity in deadlines just as our third-grade teacher did. Those who receive work have a corresponding duty to secure clear deadlines when they are not forthcoming. How they do that is a matter of persistence and diplomacy.

4. Eliminate the Effects of Peripheral Vision. The human eye can see 120 degrees in every direction. Having peripheral vision means we experience regular mini-interruptions and distractions that significantly reduce our ability to focus and get things done, including our ability to effectively triage. Facing away from passing office traffic and clearing our workspace pay huge productivity dividends.

1. Develop a Processing Method. A precept to effective triage is a system of categorization into which each request and demand can be placed. Like the medical form of triage, we need a way to assess what each request constitutes before we can compare it against other existing demands. Numerous time-management systems espouse their own method for parsing inbound requests. Whether it's Getting Things Done, the Franklin-Covey system, or another flavor, the point here is that we need one that works quickly and simply.

Categorizing each item allows us to separate the important from the less important. By decluttering the landscape and gaining a clearer view of what's at hand, the ability to get back to work (on the right things) is rapidly advanced.

It will come as no surprise that the authors recommend the QuietSpacing® method for categorizing each request/demand before aligning (and realigning) our priorities. The QuietSpacing® method divides all inbound items into one of four categories:

a. Trash. This group of items is made up of those things we simply don't need anymore. They can be thrown away or deleted. (Note that many, many, many of the things sitting in our physical and electronic workspaces are Trash. We just need to muster the courage to toss them!)

b. Archive. These are items that you may, someday, need to retrieve or refer to for some future purpose. Until then, though, they can go

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far, far away—like into off-site storage or archival hard drives or the document-management system.

c. Reference. Like Archive items, Reference items are those things we may need in the future. But in this case, we use them to conduct our day-to-day activities. Therefore, they need to be *stored* nearby.

d. Work. Ah, now we're getting down to it. Work is everything that needs to get done—by us or by others. This is the stuff we've been searching for but has been buried under all the Trash, Archive, and Reference items.

If you find yourself unable to categorize a particular item into one of the four categories above, ask this simple question: Does something further need to be done on this? If the answer is no, it must *necessarily* be Trash, Archive, or Reference (all of which are what we call Closed items). If the answer is yes, it can *only* be Work (which is the only Open category).

Though this booklet lacks room to delve further into the QuietSpacing® method, this high-level architecture serves our purpose here. We have just started the process of effective triage by accurately (and simply) separating out all of our inbound demands so we can see what really needs our attention.

2. Regularly Survey the Landscape and Adjust Expectations.

A foundation principle of triaging is that the underlying situation being studied is dynamic. Consequently, the habit of creating a fixed list of things to do is inherently flawed. One of the biggest stumbling blocks we all face is perfectly encapsulated in this old saying:

Life is what happens to you while you're busy making plans.

To truly master our workloads and effectively stay on top of what needs doing “now,” we must develop two interrelated disciplines: First, we have to regularly survey everything on our plate to determine if we have our priorities properly aligned based on what's happened since the last time we engaged in this analysis. Second, we have to adjust our expectations and those of others with whom we're working based on the dynamic nature of the triaging process. To put it in simple terms, we need to go “old-school”!

Before e-mail, the Internet, mobile smartphones, and tablet computers, there were people just like us who came to work and dealt with deadlines with a similar sense of urgency. Granted they weren't dealing with the same flood of inputs that we enjoy today, but remember the sense of urgency is relative. For example, people used

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to rush out into Main Street whenever the Pony Express rider came to town, all atwitter about the three-month-old letters in his saddlebags.

In the predigital age, we had stacks and piles of files and papers in our workspaces. These represented our workload. A prudent discipline was to survey all those files quickly each morning to determine which needed our attention first, which would be next, and so on down the list. Any changes to the original deadline on a project that resulted from this surveying effort were communicated to those who needed that information, and off to work we went.

Those with sharpened discipline quickly learned to conduct this survey at midday to reprioritize based on the passage of the last four hours and the inbound items they had received since that initial review. Changes in deadlines were generally communicated at this point too.

Finally, those demonstrating complete command over their work would conduct a final survey at the end of the day to ensure all the hatches were battened down before leaving for home. This final triage was accompanied by end-of-day updates to manage the recipients' expectations.

Stated directly, there's no reason this same process can't be used today. Before jumping into the e-mails that came in overnight and digging into the consequent digital frenzy, what if we sat quietly for five minutes first thing in the morning and reviewed what was on our plate—prioritizing things based on what we know right then? Any expectations that need to be managed can be managed right then before we jump into the first task. Engaging in this same simple process at midday and before we head home for the day results in better-managed work and a greater sense of command over it.

3. Do Not Give or Accept Vague Deadlines. When is ASAP? We all know *what* it means, but no one can tell us when it actually is. No calendar has a date and/or time on it that constitutes ASAP. Yet it is routinely assigned to work tasks and information requests. And even if no deadline is given, most of us treat any input as though it needs to be acted on ASAP. (Note that the same holds true for all of ASAP's relatives: Urgent! Top Priority! Highest Importance!)

This is not only stupid but also lazy. Imagine a third-grade teacher handing out an assignment to the class and when little Suzy asks when it's due responding "ASAP." Nonsense. If it's not acceptable for third graders, why is it acceptable for us?

Beyond this silliness, there are real problems with nonspecific deadlines. For example, if I have twelve ASAPs on my desk, which

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that came in
overnight ...
what if we sat
quietly for
five minutes
first thing in
the morning
and reviewed
what was on
our plate –
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things based
on what we
know right
then?*

one comes first? Or what about this problem: I'm going on vacation for two weeks in an hour, so how does sixteen days from now work for you? Or what about this: Does ASAP trump High Priority, or is that Most Urgent?

Why do we expect work *recipients* to determine when things need to be completed? Isn't that what the person giving the work is supposed to do? And just because the vague deadline was handed down to us, we're not excused from solving the problem instead of just pushing it downstream.

The solution is simple: do not give or accept vague, nonspecific deadlines. If we are the one giving the work, we simply need to put some specificity on the deadline: "Tuesday at noon" suffices. If we are the one receiving the work, then we need to politely and diplomatically seek specific deadlines. We can say something like "I know this is very important. Does tomorrow at three o'clock work?" or "What's driving this deadline? So I can properly prioritize the other work I already have."

There are true emergencies in the work world. However, treating every assignment as one is just a Chicken Little problem. To effectively triage our work, we need specific deadlines to properly order what needs doing first, second, third. Givers of work have this ability at their fingertips. Work receivers have the ability to pursue this clarity. We are all encouraged to do better.

4. Eliminate the Effects of Peripheral Vision. Our primary sense is sight. We rely on it almost exclusively in virtually every aspect of our lives, none more than for survival. Even in the modern age, our eyes largely manage danger avoidance. We observe and assess every flicker and movement. For example, "Is that car coming down the street going to strike me while I walk in the crosswalk?"

The human eye is capable of seeing 120 degrees in every direction. Essentially, that means that you can wiggle your index fingers up near your temples and will see the movement. Amazing, really.

But how does that affect triaging? In several ways: First, if our offices are set up in the standard configuration (i.e., chairs facing the door), we subject ourselves to dozens of mini distractions every day when we look up as people pass by. Concentration—focus—comes when distractions are minimized or eliminated. And what more important focus time is there than when we're trying to determine which demand is first in importance and which is second?

The simple solution is to face our chairs (and related office furniture) away from the door, preferably toward one of the sidewalls. This will

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accomplish two things: First, it will reduce the number of distractions that passersby produce. Second, when people *do* pass by, they will see us working, which is not a bad message to send!

The second thing we can do to eliminate the effects of peripheral vision is to clear our primary workspace (a.k.a. our desks) of all the *other* things we need to do besides the *one* we're going to work on right now. Whether things are neatly stacked/piled up somewhere other than our primary workspace or filed in filing drawers, place the triaged items somewhere other than where the actual work is accomplished. It seems inconsequential, but give it a try. The increase in focus is amazing.

Triage is an apt description of what needs to be done in our modern workplaces. The four suggestions above are offered as ways to determine which demand for our time needs our attention right now. From a time-management standpoint, the most important aspect of effective triaging is to move through the dozens of inputs efficiently while effectively categorizing each one and responding to all of them in a timely fashion. Being able to do this results in more time for us to actually *work* on those demands versus bouncing from one to the next and never really getting great traction on any of them.

Triaging Priorities: The Strategic Perspective

Although Clara Barton was the first medical professional to consistently apply the principles of triage, the term itself was introduced later, during World War I. The term *triage* is French, derived from the verb *trier*, meaning "to separate, sift, or select." As the practice of triage was refined during World War I, it came to represent the assigning of the wounded into three categories:

1. Those who are likely to live, regardless of what care they receive
2. Those who are likely to die, regardless of what care they receive
3. Those who will benefit from immediate care

During times of war, these are truly life-and-death decisions for medical personnel. Of course the stakes are not nearly as high in the day-to-day world of most working professionals, but we can certainly benefit from applying a more disciplined approach to prioritizing and scheduling incoming work.

The four tactical suggestions from above help busy people be more productive. More important, they are predicated on a subtle yet very important strategic skill: the ability to consistently and efficiently determine what is important and what is not important.

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When a task is presented to us, its importance is rarely immediately apparent. In order to triage it, we need some context or strategic framework. To do this, we must first step back from the day-to-day perspective and think strategically about what we would like to accomplish in this quarter, this year, or even in this lifetime.

Below is a list of recommendations on how to more effectively determine what work is most important and most worthy of our time and effort. Each suggestion is followed by a short description. Following the list of suggestions is a detailed explanation.

Suggestions for Making Triage Strategically Effective

- 1. Determine the *Why*.** Before you can assign strategic importance to incoming requests, it helps to first understand why you're doing what you're doing. If you think the question *why* is better left to a class in philosophy, think again. All truly great individuals and organizations have a core purpose that serves as a guiding compass.
- 2. Come Up for Air.** Just like a dolphin that needs to surface periodically to replenish oxygen in the bloodstream, we need to periodically take stock of our workloads and reenergize our effort to achieve our core purpose.
- 3. Learn to Say No.** We often say yes to avoid the risk of ignoring something that is really important. Without the discipline to say no to some requests, we'll end up with too many commitments, and the whole purpose of triaging will be undermined.
- 4. Tap Into Your Passion.** Doing things we're truly passionate about removes the drudgery from the work. Remaining mindful of what we love to do helps make triaging easy. Spend as much time as possible doing the things you *want* to be doing, and delegate or outsource those things you'd rather not do.

1. Determine the *Why*

Time is our most precious resource, so it's important that we invest it wisely. Assigning priorities to tasks is essentially the act of picking and choosing where we will invest our time and resources. Tasks with the highest priority will receive our most immediate attention, whereas tasks with lower priority may be completed at some point in time, or they may die on the battlefield, so to speak.

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Start by reviewing the mission statement of your organization. If it's been thoughtfully crafted and well written, it will describe the core purpose for your organization's existence. The Starbucks mission statement is "To inspire and nurture the human spirit—one person, one cup and one neighborhood at a time." Notice the core purpose is centered on relationships, community, and people—not around coffee, as you might guess from the outside. If I worked for Starbucks, this purpose would help set my priorities and guide where I spend my time.

You can also consider your own personal purpose. After all, we are never assigning work tasks in a vacuum. What we do at work affects what we do outside of work too. Some people's core purpose is to serve their family. For others, it is to achieve some specific goal, and for others, it might be to serve society.

By focusing resources on tasks that move you and your organization closer to achieving the core purposes, you are making the best use of your time.

2. Come Up for Air

You can't be strategic if you are constantly reacting. These are inherently opposite activities. Reactionary behaviors are becoming a big problem as we spend more time connected through our work computers and mobile devices. We need time in our lives for reflection and renewal.

It may seem counterintuitive to those who feel that increasing productivity is attained by squeezing as much as possible into their day. These are the people checking their smartphones at their children's soccer game on Saturday morning or texting as they drive down the highway at sixty-five miles per hour. In both of these examples, the "highly productive" individuals are paying a price for their activities. At the soccer game, the price is not "being present" for their children and really experiencing the joys and pains of parenthood. In the car, the price is of course safety. What good is squeezing in a few more minutes of productivity when a fatal accident can end it all?

Regularly unplug from the connected world and live in the real world. Maybe refrain from checking your e-mail after dinner until the next morning or at least until your children go to sleep. Or maybe you unplug for Saturday or Sunday. Or maybe you go for a walk and leave your phone at home or in your pocket. By doing this, you free up space in your mind to think, reflect, and be creative.

3. Learn to Say No

The whole point of triage is that sometimes you have to say no. Even in the heat of battle, with lives on the line, the medical professional

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sometimes has to say no to maximize the potential outcomes for a given set of circumstances. The same can be said for you when you think strategically about prioritization.

Some people don't like to say no because they're hardwired to want to please others. However, if we want to remain true to our core purpose and ourselves, we must know when to say no.

Saying no to something or someone is not all negative. Saying no to one thing frees us up to say yes to something else. And if we're truly strategic about where we spend our time, we will feel happier and more successful by committing to those activities that are better aligned with our personal goals and core purpose.

4. Tap Into Your Passion

If you're truly passionate about something, you'll get it done, you'll enjoy doing it, and you'll give it your best effort. To be more productive and feel more successful, look for ways to increase the time you spend on things about which you are passionate. Outsource, delegate, or avoid the activities about which you are not passionate.

Mark Cuban is a successful entrepreneur and the owner of the Dallas Mavericks professional basketball team. One of his rules for entrepreneurs is "Don't start a company unless it is an obsession and something you love." In other words, don't fill your life with activities for which you have no passion.

If you master the four suggestions for improving your operational effectiveness at triage yet still don't feel successful or productive at the end of the day, perhaps it's time to check the passion level. Are you in the right career? Or maybe you have the right vocation, but you've drifted away from the kind of activities within that vocation that drive your passion. For example, many people go into teaching for the sheer joy and love of helping others learn and gain knowledge. However, over time they may find themselves in an administrative role or somehow disconnected from the classroom itself.

Success is not some future state where you attain material wealth, prestige, or power. John Wooden, the legendary basketball coach who won ten national championships at UCLA, describes success this way:

Peace of mind is attained only through self-satisfaction in knowing that you made the effort to do the best at which you're capable.

So if you really want to experience success, spend your precious time on activities that align with your core purpose and for which you have passion because then you will, no doubt, "do the best at which you're capable."

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Summation

The modern work world is like a battlefield in many ways. We are bombarded by requests for our attention and the information we have. We must remain vigilant about the status of our flanks so as not to be overrun, and we must respond as quickly and accurately as possible.

Practicing triage can assist us in determining what will get our attention and when. To be highly effective in our triaging efforts, we need a strategic framework around what should get our attention and a set of tactical behaviors for addressing them in the appropriate order. The suggestions above will help us achieve that result.

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