PORTFOLIO MONDAYS · STEALABLE ONE-PAGER

Intake One-Pager: Accept, Park, or Decline

Treat every new ask as a capacity transaction with three outcomes only: accept to the scored queue, park, or decline.

From *Intake That Protects Capacity (And How AI Triages the Pile)*, a Portfolio Mondays episode on Portfolio Intelligence. Watch the episode

The minimum ask

No outcome fires until these are filled. If nobody can name the stop-doing, the ask is still a wish, not a capacity transaction.

Ask	
Outcome What changes for the business if this lands, in plain language	
Named owner A human, not a committee	
Rough size A coarse band beats "small"	
Dependency signal What else breaks or waits if we say yes	
What we stop if we say yes	

The gate: three outcomes only

◯ **Accept to scored queue**

Complete enough to compete. Enters prioritization. Does **not** mean start.

◯ **Park**

A logged "not now," not a soft yes.

WRITTEN REASON

REVISIT DATE

◯ **Decline or redirect**

Wrong venue, wrong owner, or not this portfolio.

REASON / REDIRECT TO

GATE OWNER (ONE ACCOUNTABLE HUMAN)

DECISION DATE

EXCEPTION? LOGGED IN DECISION LOG (Y/N)

> Gate owner is a role pattern, not an org chart. Exceptions happen. Log them in the decision log. Silent exceptions kill the system.

AI triages. Humans spend the slots.

AI MAY

- Cluster themes and duplicates
- Draft missing-info replies against the minimum fields
- Score ask completeness
- Summarize risk and dependency hints
- Produce a triage brief for the gate owner

AI MUST NOT

- Auto-approve or auto-schedule
- Invent strategic priority
- Spend a capacity slot
- Be quoted as "AI said it's high priority"

Intake gate checklist

- [ ] Write intake rules before the next hallway yes.
- [ ] Require minimum ask fields: outcome, owner, size, dependency signal, and what you stop.
- [ ] Use three outcomes only: accept to scored queue, park with reason and date, or decline and redirect.
- [ ] Let AI cluster, completeness-check, summarize, and flag duplicates, not decide.
- [ ] Log exceptions in the decision log. No silent exceptions.
- [ ] Tie every accept to capacity you'll defend in portfolio review.

Worked example (fictional)

A fictional IT and digital delivery portfolio. Seven asks hit the inbox in one week. The gate owner's greenlight batch, after an AI triage brief:

Ask	Outcome	Reason
Compliance training portal refresh before audit season	Accept to scored queue	Timing pressure is real. Still needs rough size and what slips.
Security patch window for legacy auth	Accept to scored queue	Timing pressure. Competes next, does not auto-start.
Help-desk FAQ chatbot (“two weeks, tops”)	Park	No owner beyond “ops,” no size, no stop-doing. Revisit on a set date.
Marketing microsite for a seasonal campaign	Park	Has a campaign date, no capacity size, nothing named to pause.
Recolor the executive status dashboard	Decline or redirect	Fails the outcome test. Brand polish is not a portfolio slot unless it unlocks a decision.
Finance ops report Excel export + “export for controllers”	Accept to scored queue (merged)	AI flagged a duplicate. Accepted as one ask once the two sponsors agree on one owner.

> Triage prepared the table. It did not set the places.