J P M D

TEMPLATE · FREE RESOURCE

DECISION FILTERS AND CLIENT CRITERIA

Decide before emotion, urgency, or money decides for you.

JoeCalliProd Marketing & Design

Marketing That Mobilizes. Design That Reigns.

Discipline is the practice of saying no

Undisciplined brands chase. Disciplined brands attract. Brand discipline means refusing anything that contradicts your position, dilutes your authority, or confuses your market, however attractive the short-term opportunity looks. Decision filters make that discipline automatic.

> *The quality of your brand is the sum of your decisions. Filter them accordingly.*

The five decision filters

Run any offer, client, partnership, or price change through all five before you answer.

Filter	The question	Yes / No
Position	Does this strengthen, maintain, or weaken our market position?	
Client	Would our best clients feel proud to be associated with this?	
Authority	Does this move us toward greater expertise, or dilute it?	
Economics	Does this improve our margin, sustainability, or operational clarity?	
Legacy	Three years from now, will this have made us more valuable and more trusted?	

Three or more No answers is your answer. Decline, or counter with terms that pass.

Filter log

Opportunity	Position	Client	Authority	Economic s	Legacy	Decision

The five disciplines

- Client discipline: saying no to clients outside your ideal profile, even when you need the revenue.
- Offer discipline: resisting services that do not fit your core position.
- Pricing discipline: refusing discounts that undermine your value story.
- Content discipline: skipping trends outside your authority domain.
- Partnership discipline: rejecting collaborations that do not raise your position.

Client accept and decline criteria

Write these down now, while you are not under pressure.

We accept clients who... (industry, stage, mindset, how they treat people)

We decline clients who... (red flags, mismatches, behaviors)

Our minimum standards for working together (timeline, communication, payment)

What we say when we decline, graciously and without apology

Before you commit

- [ ] The opportunity passed at least four of the five filters.
- [ ] The client fits my accept criteria.
- [ ] The price protects my margin and my position.
- [ ] I can deliver at my standard without improvising.

From The Crown Series by JoeCalliProd Marketing & Design.