

Decision-Rules Worksheet

For founder-led consulting, fractional, and learning-agency firms (5 to 30 people) about to bring a senior hire into a role the founder has been operating from instinct.

You've decided the hire is the right move. You've passed the readiness scorecard. The next gate, the one most founder-led firms in this band skip, is writing down the decisions the role is about to inherit. This worksheet is the gate. Eight rows, one per decision category. For each row, you fill in three things: the rule you currently apply, the exception you'd make, and the threshold above which it escalates back to you. Two to four hours of focused work, ideally over a single afternoon. The output is the load-bearing document the hire reads in week one and operates from in week two.

For each row: write the rule in plain language, name the exception, and set the escalation threshold. If you can't write a row in 15 minutes, mark it with a star and come back to it. Stars are useful. They tell you which decisions you've been making by feel rather than by rule, and those are usually the categories the hire is going to need the most help with on day one.

- 1 Pricing exceptions: what discount can the hire approve without checking, and where does it escalate?**

Standard band, named-account exception, escalation percent or dollar value. The discount above which the call comes back to you.
- 2 Scope creep: what size out-of-scope ask absorbs without a change order, and what triggers re-scope?**

Below 10%, change order between 10-20%, re-scope above 20% is one common pattern. Write your bands.
- 3 Client escalations: what concern does the hire own end-to-end, and what stops at your desk?**

Categories owned end-to-end, categories where the hire informs but acts, categories where the hire stops and waits. Severity threshold.
- 4 Refund authority: what credit can the hire issue without your approval, and what requires a sign-off?**

A single dollar number is the cleanest version. "Depends" is a star. Recurrence threshold for repeat credits.
- 5 Hiring authority: who can the hire bring on, replace, or have hard conversations with, alone?**

Junior hires owned end-to-end, senior hires you decide on, contractor decisions the hire owns. Seniority + budget thresholds.
- 6 Vendor selection: what tools and contractors can the hire sign for without checking, and what comes to you?**

Annual contract value threshold, multi-year commitment trigger, strategic-tier flag (brand identity, audit, legal).
- 7 Project sequencing: when inbound exceeds capacity, what ranking does the hire apply, and who decides exceptions?**

Revenue-weight, strategic-account, capacity-fit, deadline. Founder-named priority engagements as exception.
- 8 Quality bar: what does "ready to ship" mean, and who decides it has been met for a given deliverable?**

Brief-fit, sign-off, formatting, summary, citations. High-stakes deliverable + new-format + new-service-line as exceptions.



What Your Stars Signal

Zero or one star

The document is most of the way there. Hand it to the hire as part of the offer packet. Walk them through it in their first week. Calibrate together in weeks two through four. The discomfort of writing it down once is meaningfully smaller than the discomfort of two to three quarters of a senior person operating against a moving target.

Two stars

The document needs another focused session. Each star is one 60-minute writing exercise (the rule, the exception, the escalation threshold), ideally with a peer or outside operator who can pressure-test the rule against patterns that look the same from inside your firm but produce different outcomes. Two weeks of work before the role goes live.

Three or more stars

The Blueprint is the next step. Three or more stars means three or more decision categories you've been making by feel, and the hire is going to flounder on each of them in their first 60 days. The Blueprint is the fixed-scope engagement built to write the document with the founder, pressure-test each row, and surface the categories that are positioning or pricing problems in disguise.

- If three or more rows have stars, the Blueprint is the next step.**

• The Altvina Blueprint is the fixed-scope diagnostic engagement built to write the Decision-Rules Document with the founder, pressure-test each row against patterns that look the same from inside the firm but produce different outcomes, and surface the categories that aren't actually decision-rules problems but positioning or pricing problems in disguise.