WORKSHEET: YOUR FIRST ODII DESIGN

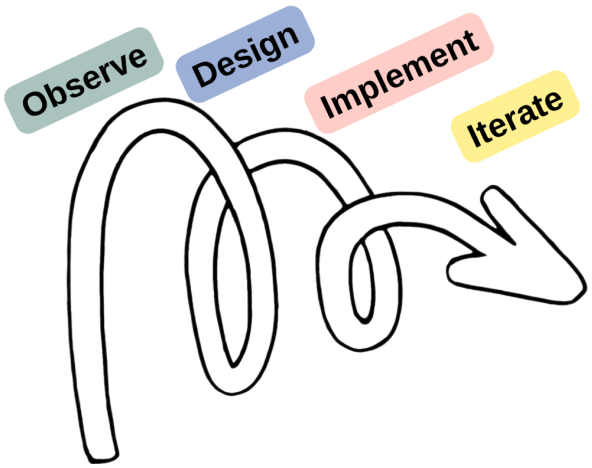
Saying yes to the right clients

Many small business owners say yes to projects or clients without first checking whether they are a good fit for us, our business model, our values and skillset, and what people actually need. Yet **'good fit' lies at the heart of ethical marketing**. Rather than pushing every person toward a sale, we're instead trying to discover if we're a good match and can truly help.

Let's use the ODII Design Spiral to identify the people you do your best work with, and build a simple decision-making tool for saying yes or no to new enquiries.

This offers you immediate practical experience with ODII, so you can have a go at the whole cycle with a topic that's contained and achievable. Aim to run through it fairly quickly, in say 15-30 minutes, then set a reminder to reflect on how it went in a few weeks.

Note: This exercise focuses on evaluating individual client enquiries rather than defining your overall niche (though you may find insights here that feed into that work later).



Step 1: Observe

> **Goal:** Slow down and notice current patterns.

Grab some notepaper and brainstorm answers to these questions:

- What common client challenges and needs are you best equipped to help with?
- Sort clients from the past year into four categories: profitable, values-aligned, enjoyable to work with, easy to work with. Do any who match all four? What do they have in common?
- What about your internal world? Which client work leaves you unenthused, bored or flat? What fires you up and makes you super keen to help?
- Look for patterns across your answers. What's becoming clear?

Permaculture tool: Roses, Thorns and Buds

- Roses (successes): What's working well with your current clients?
- Thorns (challenges): What's not working, or draining you?
- Buds (opportunities): Where might there be room for improvement or changes?

***If you're just starting out**, think about the kinds of clients you'd most love to work with, or any past work experience that might offer some clues.

Step 2: Design

> **Goal:** Create a simple framework to help assess new client enquiries.

Based on what you observed, build a quick decision-making framework for new enquiries.

Pick one option that feels best for you:

- A short list of client green flags versus red flags.
- Key questions to ask yourself when considering a new client. For example: Can I help them? Do they respect my expertise? Is their budget workable? Are their goals clear? What does my gut say? This article offers more ideas.
- A one- to two-sentence summary for 'my best-fit client is…' and 'my best-fit client is *not*…'.

Permaculture tool: The three ethics

- Earth Care: Are you choosing clients who try to be environmentally responsible?
- People Care: Do you truly have the skills and knowledge to help these client types?
- Fair Share: If a client isn't right for you, can you refer them to someone else in your network?

Step 3: Implement

Goal: Put your decision-making tool to work.

Set a timeframe for this experiment (say, a fortnight or a month) and cross-check new enquiries against your decision-making framework.

You might need to:

- Say no to any red-flag clients that come in the door.
- Update your client enquiry form or scoping call template to include a couple of questions that help you screen for areas important to you (eg, goals, budget, experience level, etc).
- Maybe even part ways with existing clients who are no longer a good fit.

Permaculture tool: Limiting factors

- What's the one thing most likely to get in the way of implementing this? Once you've named it, have a think about ways to design around it.

Step 4: Iterate

Goal: Pause, reflect and learn from your experience.

Evaluate the past few weeks to see what worked well versus what might need more clarity.

Consider the following questions:

- How did it feel to apply this framework? Did you feel empowered to say no, or did financial pressure mean you said yes to some 'not quite right' clients anyway?
- Are you attracting enough green-flag clients? If not, go back to the Observe step and start the process again from a marketing perspective: Are you speaking clearly to this client type? Do your offers reflect their actual needs?
- What systems or boundaries could you set up to help in the interim (eg, better payment terms, clearer contracts, no discounts, etc) to help manage challenging clients?
- What would you do differently in the next iteration of this?

Permaculture tool: Roses, Thorns and Buds

- Run through it again (what worked, what didn't, what's emerging), then feed these insights back into your next Observe step.