SECOND IN COMMAND CLUB · LESSON 4 TOOL

The 3-Level Decision *Filter*

The clarity to know when you have the authority to move without asking.

One of the greatest gifts a Driver can give a Dreamer is the gift of not being asked about things that do not need their attention. And one of the greatest gifts a Driver can give themselves is the clarity to know when they have the authority to move without asking. The 3-Level Decision Filter creates that clarity for both.

LEVEL	TYPE OF DECISION	DRIVER'S MOVE	EXAMPLE
1	**Low risk, low impact, reversible**	**Just do it.** No update needed.	Rescheduling a vendor call, reordering supplies, fixing a broken process link.
2	**Moderate impact, within Driver's scope**	**Do it, then inform.** 'Here is what I decided and why, flagging in case you see something I missed.'	Choosing between two vendors, handling a staff scheduling conflict, adjusting a team process.
3	**High stakes, affects the vision**	**Pause, align, then move.** 'Here are my options, here is what I recommend, and I want your eyes on this before we go.'	Changing pricing, a key hire or exit, a major resource allocation, a public-facing commitment.

SET THE THRESHOLDS

Drawing Your Own Lines

The three levels above are the shape of the filter, not the answer. What counts as moderate impact in a twelve-person clinic is a bet-the-company decision in a three-person startup. You have to set the lines for your business, together, before the filter does any work.

Run every decision through three questions first:

How easy is it? Can this be handled in one step, or does it require coordinating other people?

What does it cost? Money, hours, or attention.

What is the risk? And underneath that, the question that does the most work: if this turns out to be wrong, can we undo it? Reversible decisions almost always belong a level lower than they feel.

Then get specific. Vague lines produce escalation.

	OUR LINE
Spending under this amount is Level 1	
Spending above this amount is always Level 3	
These people or systems being affected makes it Level 3	
These decisions are never the Driver's to make, regardless of size	

THE CENTERPIECE

The Calibration Conversation

This is the conversation the filter exists to make possible, and it takes about forty-five minutes.

Separately, each of you writes down ten real decisions the Driver handled in the last month. Do not confer. Assign each one a level. Then compare the two lists side by side.

DREAMER'S LIST		DRIVER'S LIST	
DECISION	LEVEL	DECISION	LEVEL
	1 · 2 · 3		1 · 2 · 3
	1 · 2 · 3		1 · 2 · 3
	1 · 2 · 3		1 · 2 · 3
	1 · 2 · 3		1 · 2 · 3
	1 · 2 · 3		1 · 2 · 3
	1 · 2 · 3		1 · 2 · 3
	1 · 2 · 3		1 · 2 · 3
	1 · 2 · 3		1 · 2 · 3
	1 · 2 · 3		1 · 2 · 3
	1 · 2 · 3		1 · 2 · 3

The matches do not matter. The mismatches are the entire point, and there will be more than you expect. Every one is a specific piece of information:

> **Driver rated it higher than the Dreamer did.** The Driver has been escalating something they were already trusted to own. Usually this is not caution; it is that nobody ever said out loud that they did not need to ask.

> **Dreamer rated it higher than the Driver did.** Authority was assumed rather than granted. Better to find this in a calibration conversation than after a decision has already been made.

Work through every mismatch and settle it out loud. That settled list is your filter.

One more thing, and it matters more than it looks: these levels are meant to move. A decision that is Level 3 in month one should be Level 2 by month twelve, because trust was earned in between. Revisit the placements at your annual Growth Alignment Check and move what has earned moving. If nothing has moved in a year, the partnership is not growing.

Both Perspectives

DREAMER PERSPECTIVE	DRIVER PERSPECTIVE
The most common failure mode in a growing Dreamer-Driver partnership is escalation paralysis, a Driver who brings every decision to the Dreamer because they are not sure what they are authorized to own. This creates exactly the bottleneck you built the Driver relationship to prevent. Have an explicit conversation with your Driver about the 3-Level Filter. Tell them which categories of decisions are theirs to make. Give them the permission explicitly, not implicitly. Most Drivers are not asking because they are unsure; they are asking because they have never been clearly told they do not need to. Use the Level 3 decisions as the agenda for your weekly sync. Anything below that should arrive in your inbox as a completed action with a brief note, not a question.	The 3-Level Filter is one of the most freeing tools you will ever use, once you trust it. Start by running every decision through it for one full week. Ask yourself honestly: am I bringing this to my Dreamer because I truly need their input, or because I do not trust myself to own the outcome? Drivers who over-escalate, who bring Level 1 and 2 decisions upward, train their Dreamers to micromanage. It is not intentional, but it happens. Every time you ask a question you could answer yourself, you are inadvertently signaling that you need supervision. And when a decision is genuinely Level 3, when it truly needs the Dreamer's eyes, bring it like Sara did. Not a problem. Not a crisis. Options, context, and your recommendation. Let them make the call with your thinking already done.