



**The Resilience Brilliance™ Capacity
Playbook: A Practical Guide to
Sustainable Performance**
Powered by the Capacity First™ Method

The Resilience Brilliance™ Capacity Playbook is a practical operating system for ambitious women, leaders, entrepreneurs, caregivers, and high achievers who want to build success without burning through their health, peace, relationships, or purpose.

Jennifer (Jena) L. Taylor
Resilience Brilliance™ programs

Plan your revenue. Protect your capacity. Lead your life.™

The Resilience Brilliance™ Capacity Playbook: A Practical Guide to Sustainable Performance

Powered by the Capacity First™ Method

For leaders, entrepreneurs, caregivers, and high achievers who are ready to build success without abandoning themselves.

Introduction

Welcome to ***The Resilience Brilliance™ Capacity Playbook***.

You made a smart purchase.

This is not a traditional planner, and I did not design this to simply help you track more tasks, fill more boxes, or squeeze more into an already full life. I created this playbook for high-achieving women, leaders, entrepreneurs, speakers, authors, consultants, creators, caregivers, and purpose-driven professionals who are building something meaningful while carrying a lot.

If you are leading, selling, creating, serving, caregiving, growing a business, building visibility, or trying to become more intentional with your time and energy, this playbook is for you.

Most planners ask, “What do you need to do today?”

This playbook asks better questions:

- What actually moves the needle?
- What creates revenue, momentum, peace, and progress?
- What deserves your energy now?
- What is draining your capacity?
- What needs to be protected so you can keep building without burning out?

That is the difference.

The Resilience Brilliance™ Capacity Playbook is a premium business and capacity operating system. Powered by the Capacity First™ Method, it helps you plan your year, clarify your revenue goals, organize your business strategy, focus your monthly and weekly priorities, assess your capacity, protect your recovery, and lead your life with more intention and capacity instead of pressure.

I designed this playbook to help you stop building success from exhaustion and start leading from capacity.

So, if you have been using a traditional planner and still feel overwhelmed, scattered, behind, or overextended, consider this your permission to ditch the planner.

You do not need another place to collect endless tasks.

You need a system that helps you lead.

Inside these pages, you will be guided through annual vision, business strategy, quarterly planning, monthly CEO dashboards, weekly leadership pages, daily CEO rhythms, capacity audits, recovery planning, reflection prompts, and resilience tools that help you build success you can sustain.

Use this playbook as your command center.

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For leaders, entrepreneurs, caregivers, and high achievers who are ready to build success without abandoning themselves.

Bring it to your Monday CEO meeting. Use it when you are planning your month, reviewing your revenue, preparing for a speaking opportunity, mapping your offers, checking your capacity, or deciding what no longer deserves your energy.

You do not have to use every page perfectly. This is not about perfection. It is about leadership, discernment, capacity, and sustainable performance.

Return to the pages that help you think clearly. Revisit the prompts when you feel stretched. Use the dashboards when you need direction. Let the reflection pages help you notice what is working, what is draining you, and what needs to change.

I built this playbook on a simple belief:

Capacity comes before performance.

You are not here to build success that costs you your health, peace, identity, relationships, or purpose.

You are here to build success you can live inside.

Welcome to a new way of planning, leading, and building.

Welcome to **The Resilience Brilliance™ Capacity Playbook.**

A handwritten signature in black ink that reads "Jenna". The signature is fluid and cursive, with the first letter 'J' being particularly large and stylized.

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For mental health education and support, you may contact:

NAMI, National Alliance on Mental Illness

Website: <https://www.nami.org/>

Phone: **1.800.950.6264**

Text: **NAMI to 62640**

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Part 1: Overview and Personal Foundation

Welcome to The Resilience Brilliance™ Capacity Playbook.

This is not a traditional planner.

This is a leadership tool for the person who is building something meaningful while carrying real responsibility, real ambition, and real life.

You may be leading a business, a team, a family, a mission, a transition, a healing season, or all the above. You may be successful on paper while privately wondering how long you can keep operating at this pace.

I created this playbook to help you stop planning from pressure and start leading from capacity.

Inside these pages, you will not only define your goals. You will examine what those goals require from you. You will look at revenue, visibility, strategy, recovery, boundaries, energy, relationships, and resilience as connected parts of one operating system.

Because sustainable performance is not about doing more.

It is about building a life and business that no longer requires you to abandon yourself to succeed.

Welcome to a new way of leading and living.

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Capacity Before Performance™ method

Most planning systems begin with output:

- What will you accomplish?
- How much will you produce?
- How fast can you grow?
- How many tasks can you complete?

The Capacity First™ method begins with a different question:

What do you have the capacity to carry, create, sustain, and overcome?

That question changes everything.

When capacity comes first, goals become wiser. Boundaries become clearer. Revenue becomes more intentional. Leadership becomes more sustainable. Recovery becomes part of the strategy, not an afterthought.

You are not here to build success that costs you your health, identity, peace, or relationships.

You are here to build success you can live inside.

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How To Use This Playbook

Use this playbook in 4 rhythms:

Rhythm	When To Use	Purpose
Annual	Beginning of the year or new season	Set vision, revenue, identity, and strategy
Quarterly	Every 90 days	Choose objectives, capacity goals, and big rocks
Monthly	Beginning and end of each month	Review revenue, pipeline, capacity, and momentum
Weekly	Every Monday and Friday	Lead your week with discernment and recovery

This is not meant to become another obligation.

Use the pages that help you lead better. Return to the rest when you need discernment, reset, or direction.

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The Capacity First™ Method

The Capacity First™ Method has 5 steps:

- **Assess** Understand your current capacity across physical, mental, emotional, relational, spiritual, professional, and financial areas.
- **Identify** Name what is draining your capacity, including overcommitment, unclear boundaries, emotional labor, poor systems, underpricing, or unsupported caregiving.
- **Protect** Put boundaries, recovery rhythms, decision filters, and support structures around what keeps you well.
- **Rebuild** Restore energy, confidence, discernment, resilience, and self-trust through practical daily, weekly, and monthly actions.
- **Align** Redesign your goals, work, revenue, leadership, and lifestyle around what is sustainable.

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Annual Vision Prompt

This year, I am building a life and business that feels like:

Prompt areas:

Area	My Vision
My health	
My peace	
My business	
My revenue	
My relationships	
My leadership	
My home life	
My purpose	
My joy	

Closing prompt:

At the end of this year, I want to be able to say:

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Definition of Success

Success without self-abandonment means:

Complete these statements:

- I am successful when I feel:
- I am successful when my body feels:
- I am successful when my relationships feel:
- I am successful when my work feels:
- I am successful when my money feels:
- I am successful when my calendar reflects:
- I am successful when I no longer:
- I am successful when I consistently:

Core question:

What version of success am I no longer willing to pursue?

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Annual Revenue Goal

My annual revenue goal is:

Add your own revenue type streams in addition to using the supplied prompts below.

Revenue Stream	Annual Goal	Monthly Average Needed	Notes
Coaching or consulting			
Speaking			
Corporate workshops			
Digital products			
Books or publishing			
Podcast or sponsorships			

Reflection:

Which revenue streams create the most money with the least capacity drain?

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Monthly CEO Dashboard Template

This month, I am leading with discernment, capacity, and intention.

Category	Focus
Revenue goal	
Main offer	
Top 3 priorities:	
1.	
2.	
3.	
Most important revenue activity	
Pipeline focus	
Visibility focus	
Capacity risk	
Recovery commitment	
Boundary needed	
Support needed	
CEO question:	
What must happen this month for me to make meaningful progress without burning myself out?	

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Weekly CEO Dashboard Template

This week, I will move the needle instead of chasing everything.

Weekly Leadership Area

Answer

My Big 3 outcomes

- 1.
- 2.
- 3.

My most important revenue activity:

My highest value relationship to nurture:

My top client or customer priority:

My current capacity level from 1 to 10:

What may drain me this week:

What will restore me this week:

One thing I need to stop, pause, or delegate:

Friday reflection:

What created revenue?

What created momentum?

What consumed capacity without return?

Capacity Audit Template

Rate each area from 1 to 10 using the key below as your guide.

Annual Capacity Commitments

Score	Meaning
8 to 10	Strong capacity
5 to 7	Strained capacity
3 to 4	At risk capacity
1 to 2	Critical capacity deficit

How I will protect myself while I build?

This year, capacity protection has become part of the plan.

Area	My commitment
Sleep	
Movement	
Nutrition	
Medical or wellness support	
Recovery time	
Emotional support	
Spiritual grounding	
Boundaries	
Delegation	
Joy	
Play	
Relationships	

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Non-Negotiables

My 3 capacity non-negotiables this year are:

-
-
-

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Annual Theme

The story this year is telling

Every year has a theme. Some years are for building. Some are for healing. Some are for visibility. Some are for recovery. Some are for expansion. Some are for simplifying.

This Year's Theme

This is a year of:

Why This Theme Fits

This theme matters because:

What This Theme Requires

This Theme Requires Me To...

This Theme Requires Me To Stop...

Theme Statement

This is the year I:

“Before you build the year, define the person who will lead it.”

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Part 2: Annual Vision and Identity

Before you build the year, define the person who will lead it.

This section helps you clarify your vision, identity, values, success definition, personal mission, and capacity requirements for the year ahead.

You are not simply setting goals.

You are choosing the kind of life, leadership, and business you are willing to build.

Capacity First™ Principle:

You cannot sustainably become someone your life has no capacity to support.

The Year I Am Ready to Lead

This year is not asking you to become more exhausted, more overextended, or more available to everything and everyone.

This year is asking you to become more honest.

Honest about what you want.

Honest about what drains you.

Honest about what your body has been trying to tell you.

Honest about the version of success you no longer want to perform.

Honest about the kind of leadership, business, relationships, and life you are ready to build.

Before you create another plan, pause here.

Let this be the year you stop proving and start leading.

Reflection Prompts

- What am I ready to stop carrying into this year?
- What am I ready to finally admit that I want?
- What part of me needs more protection this year?
- What part of me is ready to be seen more fully?

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My Annual Vision

This Year, I Am Building...

Complete each statement with honesty, not performance. Consider your vision for each area, not where you are right now.

Area	My Vision
------	-----------

My health feels like

My peace feels like

My work feels like

My business feels like

My revenue feels like

My leadership feels like

My relationships feel like

My home life feels like

My creativity feels like

My faith or spiritual life feels like

My joy feels like

My rest feels like

Completion Statement

At the end of this year, I want to be able to say:

“This was the year I...”

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Dream Life Vision

The Life I Am No Longer Postponing

Your dream life is not only about luxury, achievement, or external success. It is about alignment. It is about waking up inside a life that no longer requires you to abandon yourself to maintain it.

Describe Your Dream Life

- Where I live:
- How my mornings feel:
- How my body feels:
- How I work:
- Who I serve:
- What I create:
- How I earn:
- How I rest:
- Who surrounds me:
- What I no longer tolerate:
- What I have more space for:
- What I am known for:

Capacity First™ Question

What kind of capacity would this dream life require me to build, protect, or reclaim?

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Personal Mission

Why I Am Building This

A mission gives your ambition direction. It keeps you from chasing opportunities that look impressive but do not align with your purpose, capacity, or calling.

My Personal Mission Statement

Use this structure:

I am here to...

I serve...

I create...

I lead by...

I want my work and life to help others...

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Draft My Mission

My personal mission is:

Mission Filter

This year, I will use my mission to help me decide:

Decision Area

What My Mission Requires

What I say yes to

What I say no to

Who I serve

What I create

How I lead

How I protect my capacity

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Guiding Values

The Values That Will Lead My Year

Values are not words you admire. They are standards you are willing to live by.

Choose **5 to 7 values** that will guide your decisions this year.

Value Bank

Peace	Integrity	Power
Freedom	Courage	Beauty
Faith	Presence	Impact
Family	Leadership	Consistency
Health	Excellence	Sovereignty
Creativity	Rest	Resilience
Service	Truth	Connection
Joy	Visibility	Legacy
Wealth	Simplicity	Discipline
Wisdom	Generosity	Expansion

My Core Values This Year

Value	What This Means In Practice	What It Requires Me To Stop Doing
-------	-----------------------------	-----------------------------------

1		
---	--	--

2		
---	--	--

3		
---	--	--

4		
---	--	--

5		
---	--	--

Word of the Year

Your word of the year is not a decoration. It is a leadership cue.

It should remind you how you want to move, decide, create, recover, and lead.

My Word

My word of the year is:

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Why This Word Matters

I chose this word because:

How This Word Will Guide Me

Area	How My Word Will Shape This Area
-------------	---

My decisions

My business

My relationships

My health

My boundaries

My visibility

My recovery

My money

Reminder Statement

When I feel overwhelmed, I will remember:

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Definition of Success

Success Without Self-Abandonment

Not every version of success deserves your energy.

Some versions of success require too much pretending.

Some require too much depletion.

Some require you to be visible but not whole.

Some reward performance while punishing your peace.

This year, you get to define success differently.

My New Definition of Success

- I am successful when my body feels:
- I am successful when my mind feels:
- I am successful when my relationships feel:
- I am successful when my work feels:
- I am successful when my money feels:
- I am successful when my calendar reflects:
- I am successful when I no longer:
- I am successful when I consistently:
- I am successful when I have space for:
- I am successful when I feel proud of:

Release Prompt

The version of success I am no longer willing to pursue is:

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Identity Shift

Who I Am Becoming

Goals require identity. If you only plan what you want to do, but never define who you must become, you will keep defaulting to old patterns. This page is about identity alignment.

Identity Area	I Am Becoming Someone Who...
----------------------	-------------------------------------

Health	
--------	--

Leadership	
------------	--

Money	
-------	--

Visibility	
------------	--

Creativity	
------------	--

Boundaries	
------------	--

Relationships	
---------------	--

Recovery	
----------	--

Faith or purpose	
------------------	--

Joy	
-----	--

Identity Declaration

This year, I am becoming:

Old Identity to Release

The version of me I am lovingly releasing is:

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Capacity Identity

The Capacity I Need to Become This Person

You do not need more pressure. What you need is more **capacity**.
The next version of your life will require more than ambition. It will require the physical, emotional, mental, relational, spiritual, and financial capacity to hold what you seek and are creating.

Capacity Area	What I Need More of This Year	What I Need Less of This Year
Physical capacity		
Mental capacity		
Emotional capacity		
Relational capacity		
Spiritual capacity		
Financial capacity		
Creative capacity		
Leadership capacity		

Capacity First™ Reflection

What am I asking myself to carry this year?

What support will I need to carry it well?

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What I Am No Longer Available

My Capacity Protection List

Boundaries are easier to honor when you name what you are no longer available for before the pressure arrives.

This Year, I Am No Longer Available For:

- Overcommitting to prove my value.
- Undercharging to be chosen.
- Saying yes when my body has already said no.
- Confusing urgency with importance.
- Carrying responsibilities that require shared ownership.
- Shrinking my vision to make others comfortable.
- Performing wellness while privately falling apart.

My Personal List

Pattern, Person, or Pressure	Why It Drains My Capacity	Boundary I Will Practice
1		
2		
3		
4		
5		

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Annual Capacity Commitments

How I Will Protect Myself While I Build

This year, capacity protection has become part of the plan.

Area	My Commitment
------	---------------

Sleep	
-------	--

Movement	
----------	--

Nutrition	
-----------	--

Medical or wellness support	
-----------------------------	--

Recovery time	
---------------	--

Emotional support	
-------------------	--

Spiritual grounding	
---------------------	--

Boundaries	
------------	--

Delegation	
------------	--

Joy	
-----	--

Play	
------	--

Relationships	
---------------	--

Non-Negotiables

My 3 capacity non-negotiables this year are:

-
-
-

The Resilience Brilliance™ Capacity Playbook: A Practical Guide to Sustainable Performance
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For leaders, entrepreneurs, caregivers, and high achievers who are ready to build success without abandoning themselves.

Annual Theme

The Story This Year Is Telling

Every year has a theme. Some years are for building. Some are for healing. Some are for visibility. Some are for recovery. Some are for expansion. Some are for simplifying.

This Year’s Theme

This is a year of:

Why This Theme Fits

This theme matters because:

What This Theme Requires

This Theme Requires Me To...	This Theme Requires Me to Stop...

Theme Statement

This is the year I:

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My Future Self Letter

A Letter from the Person I Am Becoming

Write a letter now from your future self at the end of this year.

Let you tell you what changed, what mattered, what you stopped tolerating, what you protected, and for which accomplishments you are most proud.

Dear Me,

At the end of this year, I want you to know:

This year, you were brave enough to:

You stopped:

You started:

You protected:

You healed:

You created:

You earned:

You became:

You learned that success could feel like:

With love,

The person you are becoming

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My Leadership Standards

How I Will Lead This Year

Leadership is not only what you do publicly. It is how you make decisions privately.

This year, I will lead with:

Leadership Area	My Standard
Integrity	
Courage	
Discernment	
Communication	
Visibility	
Boundaries	
Money	
Service	
Rest	
Decision-making	

My Leadership Promise

This year, I promise to lead myself by:

This year, I promise to lead others by:

This year, I promise to protect my capacity by:

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My Visibility Identity

Being Seen Without Self-Abandonment

Visibility is not about performing. It is about allowing your work, voice, story, and leadership to be seen by the people who need them.

This Year, I Am Willing to Be Seen As:

-
-
-
-
-

Visibility Reflection

What do I want others to know me by?

What message am I ready to share more boldly?

Where have I been hiding?

What kind of visibility feels aligned?

What kind of visibility drains me?

My Visibility Commitment

This year, I will become more visible by:

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My Money Identity

Earning With Capacity, Integrity, and Power

Money is not separate from capacity. Undercharging, overdelivering, avoiding sales, and tolerating unclear money boundaries all drain capacity.

This Year, My Relationship with Money Will Become:

Money Area	My New Standard
Revenue	
Pricing	
Sales	
Receiving	
Saving	
Investing	
Giving	
Spending	
Asking	
Negotiating	

Money Identity Prompts

- This year, I am available to earn:
- I am no longer available to undercharge for:
- I will stop apologizing for:
- I will allow money to support my:
- My revenue will create more capacity by:

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My Relationship with Rest

Rest Is Part of the Strategy

Rest is not what you earn after depletion. Rest is what makes sustainable performance possible.

Rest Reflection

- What has my old relationship with rest been?
- What did I learn about rest from my family, work, culture, or industry?
- Where do I feel guilty for resting?
- What happens when I ignore my need for recovery?
- What kind of rest actually restores me?
- What kind of rest do I need more of this year?

My Rest Standards

Rest Type	What I Need This Year
------------------	------------------------------

Daily rest

Weekly rest

Monthly rest

Seasonal rest

Emotional rest

Creative rest

Spiritual rest

Social rest

Rest Commitment

This year, I will treat rest as:

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My Personal Declaration

The Year I Choose Capacity First™

- ☐ This is the year I stop building success on depletion.
- ☐ This is the year I stop proving my worth through exhaustion.
- ☐ This is the year I stop confusing constant availability with leadership.
- ☐ This is the year I honor my body, my brilliance, my calling, my work, my relationships, and my future.
- ☐ This is the year I build with capacity first.

My Declaration

I declare that this year:

I will protect:

I will create:

I will release:

I will lead:

I will receive:

I will no longer:

I will become:

Signature

Signed:

Date:

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Transition Into Annual Business Strategy

You have defined the person who will lead the year. Now you are ready to define what she is building.

The next section turns your vision into strategy. Not scattered goals. Not endless tasks. Not pressure disguised as planning.

You will clarify your revenue, offers, visibility, speaking, podcast, book, corporate opportunities, collaborations, and lifestyle priorities.

The goal is not to do everything. The goal is to build the right things with enough capacity to sustain them.

Transition Prompt

Based on the identity I have chosen, the business I build this year must support:

- My capacity by:
- My revenue by:
- My visibility by:
- My lifestyle by:
- My purpose by:

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Part 3: Annual Business Strategy

Build the business that can hold the life you want.

This section turns your vision into a practical business strategy. Not a scattered list of ideas. Not a pressure-filled plan. A clear operating map for revenue, visibility, offers, clients, capacity, and sustainable growth.

Capacity First™ Principle:

A business that requires your depletion is not a successful business. It is an expensive pattern.

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The Business I Am Building This Year

My Business Vision

This year, my business is becoming:

The Purpose of My Business

My business exists to:

The People I Serve

My ideal clients, customers, audiences, or organizations are:

The Problem I Solve

The core problem my business helps solve is:

The Transformation I Create

After working with me, people or organizations experience:

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Business Identity Statement

This year, I am building a business that is:

Area	My Intention
Profitable	
Sustainable	
Spacious	
Visible	
Purposeful	
Scalable	
Aligned with my capacity	

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Annual Revenue Goal

My Revenue Target

This year, my annual revenue goal is: \$_____

Why This Number Matters

I chose this number because:

Revenue Breakdown

Revenue Category	Annual Goal	Monthly Average Needed
Products	\$	\$
Speaking	\$	\$
Corporate	\$	\$
Coaching or Consulting	\$	\$
Book or Publishing	\$	\$
Podcast or Sponsorships	\$	\$
Collaborations or Affiliates	\$	\$
Other	\$	\$
Total	\$	\$

Capacity First™ Check

Does this revenue goal match my current capacity, support, audience, pricing, and delivery model?

If not, what needs to change?

Revenue Streams

My Revenue Ecosystem

A resilient business does not depend on one fragile stream of income. If you have a digital version of this product, feel free to change the revenue types to fit your exact requirements. For a static version, please use the additional lines for your customization, or create a new digital document.

Revenue Stream	Current Status	Growth Priority	Notes
Digital products	Not started / active / scaling	Low / medium / high	
Workshops	Not started / active / scaling	Low / medium / high	
Speaking	Not started / active / scaling	Low / medium / high	
Corporate training	Not started / active / scaling	Low / medium / high	
Coaching	Not started / active / scaling	Low / medium / high	
Consulting	Not started / active / scaling	Low / medium / high	
Licensing	Not started / active / scaling	Low / medium / high	
Book sales	Not started / active / scaling	Low / medium / high	
Podcast sponsors	Not started / active / scaling	Low / medium / high	
Events	Not started / active / scaling	Low / medium / high	
Membership	Not started / active / scaling	Low / medium / high	

Focus Decision

This year, my top 3 revenue streams are:

-
-
-

What I Will Not Build Yet

To protect my capacity, I am not focusing on:

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Signature Offers

The Offers That Will Lead My Business

Offer Name	Audience	Price	Delivery	Capacity Required
Offer 1		\$		Low / medium / high
Offer 2		\$		Low / medium / high
Offer 3		\$		Low / medium / high
Offer 4		\$		Low / medium / high

Offer Discernment

My strongest offer this year is:

It solves:

It creates:

It should be sold through:

Capacity First™ Question

Which offer has the best combination of revenue, impact, ease, and repeatability?

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Product Strategy

My Product Ecosystem

Products allow your work to travel beyond your calendar.

Product	Purpose	Price	Launch Date	Revenue Goal
Playbook		\$		\$
Workbook		\$		\$
Course		\$		\$
Template		\$		\$
Audio or video resource		\$		\$
Bundle		\$		\$

Product Priority

The first product I will build, improve, or launch is:

Product Success Criteria

This product will be successful if it:

- Creates clear transformation.
- Is simple to sell.
- Does not require constant live delivery.
- Leads naturally into a higher-value offer.
- Supports my larger brand ecosystem.

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Speaking Strategy

My Speaking Vision

This year, I want to be known as a speaker on:

Signature Talk Topics

Talk Title	Audience	Paid / Unpaid	Purpose
1			
2			
3			

Speaking Targets

Metric	Annual Goal
Speaking applications submitted	
Discovery calls booked	
Events booked	
Paid events booked	
Revenue from speaking	\$
Corporate leads generated	

Capacity First™ Speaking Filter

I will say yes to speaking opportunities that:

I will say no to speaking opportunities that:

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Corporate Strategy

Organizations I Want to Serve

Organization Contact Need Next Step

- 1
- 2
- 3
- 4
- 5

Corporate Offer Ladder

Offer	Price Range	Best Buyer
1.	\$	
2.	\$	
3.	\$	
4.	\$	
5.	\$	
6.	\$	

Corporate Focus

This year, my strategy is (example: to become known for):

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Podcast Strategy

My Podcast Purpose

My podcast exists to:

Podcast Growth Priorities

Area	Goal
Publishing consistency	
Ideal guest profile	
Audience growth	
Downloads	
Email list growth	
Sponsor opportunities	
Corporate lead generation	
Book / product promotion	

Strategic Guest List

Guest	Why They Matter	Status
1		
2		
3		
4		
5		

Capacity First™ Question

How can my podcast create authority without becoming another exhausting content obligation?

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Book and Thought Leadership Strategy

My Thought Leadership Platform

This year, I want my ideas to be known for:

Core Ideas I Will Own

- 1.
- 2.
- 3.
- 4.
- 5.
- 6.

Book Strategy

Area	Plan
Book concept	
Target reader	
Core promise	
Writing schedule	
Publishing path	
Launch strategy	
Media strategy	
Speaking connection	

Thought Leadership Question

What do I believe strongly enough to say repeatedly for the next 10 years?

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Marketing Strategy

My Marketing Priorities

Marketing should make the right people understand, trust, and remember your work.

Channel	Role in Business	Weekly Action
---------	------------------	---------------

Email list		
------------	--	--

LinkedIn		
----------	--	--

Instagram		
-----------	--	--

Facebook		
----------	--	--

TikTok		
--------	--	--

YouTube		
---------	--	--

Podcast		
---------	--	--

Speaking		
----------	--	--

Partnerships		
--------------	--	--

PR / media		
------------	--	--

Website / SEO		
---------------	--	--

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Core Message

This year, my primary message is:

Content Pillars

-
-
-
-
-

Capacity First™ Marketing Rule

I will not create content that gets attention but drains my authority, energy, or alignment.

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Visibility Strategy

Where I Need to Be Seen

Visibility Channel	Goal	Next Step
Stages		
Podcasts		
Media		
Corporate rooms		
Online communities		
Strategic partnerships		
Conferences		

Visibility Identity

This year, I am willing to be seen as:

Visibility Commitment

Each month, I will take one visibility action:

Month: _____

Action: _____

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Collaboration Strategy

Strategic Relationships

Person / Brand / Organization	Opportunity	Next Step
1		
2		
3		
4		
5		

Collaboration Types

I am open to:

- Podcast swaps
- Joint workshops
- Affiliate partnerships
- Corporate introductions
- Speaking referrals
- Book launch partnerships
- Community partnerships
- _____
- _____
- _____

Capacity Filter

A collaboration is aligned when it creates mutual value without creating hidden labor I cannot sustain.

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Client Journey

How People Move Through My Ecosystem

Stage	Experience / Offer	Goal
Discover		
Trust		
Entry		
Deepen		
Expand		
Advocate		

Journey Gap

Where are people currently getting stuck?

Next Improvement

The part of my client journey I will improve first is:

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Sales Focus

Selling With Discernment and Capacity

Don't think of sales as pressure. Sales is helping the right person make the right decision that serves that person well.

Sales Activity	Weekly Target
----------------	---------------

Follow-ups	
------------	--

Discovery calls	
-----------------	--

Proposals sent	
----------------	--

Offers made	
-------------	--

Partnerships contacted	
------------------------	--

Corporate outreach	
--------------------	--

Past clients reconnected with	
-------------------------------	--

My Sales Standard

Use this section to define how you want to show up in sales. Your sales standard should become your personal code for how you communicate, invite, follow up, price, and close.

Examples:

- Honesty
- Discernment
- Confidence
- Service
- Clear communication
- Respect for my capacity
- Respect for the buyer's timing
- No overexplaining
- No apologizing for my price
- No chasing misaligned clients

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Stronger completed example:

This year, I will sell with clarity, confidence, discernment, and respect for my capacity. I will make clear offers, follow up with integrity, and trust that the right clients do not require me to abandon myself to be chosen.

This is my sales standard

This year, I will sell with:

Money Boundary

Use this section to name the money patterns you are done repeating. This is where you protect your pricing, energy, scope, and emotional labor.

I am no longer available to:

Examples:

- Undercharging to make people comfortable.
- Overdelivering to prove my value.
- Avoiding follow-up because I am afraid of being too much.
- Discounting without a strategic reason.
- Taking on clients who are not aligned.
- Creating custom work without custom pricing.
- Letting unpaid emotional labor drain my business.
- Confusing someone's urgency with my responsibility.

Stronger completed example:

I am no longer available to undercharge, chase, overexplain, or perform my worth to make a sale. I will allow my offers, pricing, and follow-up process to reflect the value of my work and the capacity required to deliver it well.

Capacity First™ Sales Question:

What is the simplest, cleanest sales action I can take this week that supports revenue without creating unnecessary pressure?

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Operations and Support

The Systems That Will Hold the Business

Area	Current System	Needs Improvement?
Calendar		Yes / no
Email		Yes / no
CRM		Yes / no
Invoicing		Yes / no
Contracts		Yes / no
Content planning		Yes / no
Client delivery		Yes / no
Metrics tracking		Yes / no
Delegation		Yes / no

Support I Need

This year, I may need support with:

-
-
-

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Lifestyle Business Design

The Life My Business Must Support

My business should create room for:

Life Area	What I Want My Business to Support
-----------	------------------------------------

Health	
--------	--

Family	
--------	--

Rest	
------	--

Travel	
--------	--

Creativity	
------------	--

Caregiving	
------------	--

Relationships	
---------------	--

Joy	
-----	--

Wealth	
--------	--

Purpose	
---------	--

Lifestyle Boundaries

My ideal workweek looks like:

My non-working time is protected by:

I do my best work when:

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Capacity Aligned Business Model

Does This Business Match My Real Capacity?

Business Area	Capacity Required	Sustainable?	Adjustment Needed
Offers	Low / medium / high	Yes / no	
Delivery	Low / medium / high	Yes / no	
Marketing	Low / medium / high	Yes / no	
Sales	Low / medium / high	Yes / no	
Operations	Low / medium / high	Yes / no	
Travel	Low / medium / high	Yes / no	
Client communication	Low / medium / high	Yes / no	

Capacity First™ Decision

The business model I am choosing this year is:

The business model I am no longer willing to maintain is:

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Annual Business Scorecard

My Business Success Metrics

Metric	Annual Goal	Why It Matters
Revenue	\$	
Profit	\$	
Email subscribers		
Speaking events		
Corporate leads		
Products sold		
Podcast downloads		
Strategic partnerships		
Client results		
Recovery days protected		

Success Reflection

At the end of this year, I will know the business worked if:

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Transition Into Quarterly Planning

You have named the business you are building. Now it is time to break the year into quarters. A sustainable year is not built all at once. It is built in focused seasons.

Each quarter will ask:

- What matters most now?
- What will create revenue?
- What will create momentum?
- What must be protected?
- What is my real capacity for this season?

Capacity First™ Principle

Do not plan a quarter for the capacity you wish you had. Plan for the capacity you can honestly support, then build from there.

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Part 4: Quarterly Planning

Quarterly Planning

Your next 90 days are not about doing everything.

They are about choosing what deserves your capacity now.

Capacity First™ Principle

A resilient leader does not chase every opportunity.

A resilient leader chooses the season she is in.-

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Quarter at a Glance

Quarter

Quarter:

Dates:

Theme for this quarter:

My 3 Words for This Quarter

-
-
-

What This Quarter Is Really About

This quarter, I am focused on:

What I Am Not Carrying This Quarter

To protect my capacity, I am releasing or postponing:

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Capacity First™ Check

Before I commit to this quarter, I need to be honest about:

Area	Current Reality
Energy	
Time	
Emotional bandwidth	
Support	
Financial pressure	
Family or caregiving demands	

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Quarterly Objectives

My Top 3 Objectives

Choose only three. If everything is a priority, your capacity will be consumed by confusion.

Objective	Why It Matters	Success Looks Like
1		
2		
3		

Capacity Alignment

Do these objectives match my real capacity this quarter? Yes / No / Not yet

If not, what needs to change?

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Key Results

How I Will Measure Progress

Each objective needs measurable proof.

Objective	Key Result 1	Key Result 2	Key Result 3
1.			
2.			
3.			

The Numbers That Matter

This quarter, I will track:

- Revenue:
- Profit:
- Leads:
- Sales conversations:
- Speaking opportunities:
- Corporate opportunities:
- Audience growth:
- Capacity score:

Capacity First™ Reflection

What number matters most this quarter because it protects the business?

What number matters most because it protects me?

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Big Rocks

The Non-Negotiable Priorities

These are the projects, decisions, or outcomes that will move the business forward.

Big Rock	Owner	Deadline	Revenue Impact	Capacity Cost
1			High / Medium / Low	High / Medium / Low
2			High / Medium / Low	High / Medium / Low
3			High / Medium / Low	High / Medium / Low

Capacity First™ Filter

Before I say yes, I will ask:

- Does this create revenue, momentum, alignment, or recovery?
- Does this require capacity I do not currently have?
- Is this mine to carry?
- What must come off my plate if this goes on?

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Quarterly Revenue Goal

Revenue Target

My revenue goal this quarter is: \$ _____

Revenue Breakdown

Revenue Source	Goal	Strategy
Products	\$	
Coaching or consulting	\$	
Speaking	\$	
Corporate workshops	\$	
Sponsorships	\$	
Affiliates or collaborations	\$	
Other _____	\$	

Minimum Viable Revenue

The minimum I need this quarter is: \$ _____

Stretch Revenue Goal

The number I would love to reach is: \$ _____

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Revenue Reflection

The cleanest path to revenue this quarter is:

The most distracting revenue path is:

Quarterly Capacity Goal

My Capacity Goal

Your quarterly goals should not only measure what you want to accomplish. They should also identify what you need to protect, restore, or rebuild to sustain the work.

Before you commit to more output, take an honest look at the condition of the person who must carry the plan. This section helps you name what your body, mind, emotions, relationships, spirit, and creativity need over the next 90 days.

Use the table below to define what each area of capacity needs this quarter. Some areas may need protection. Others may need rebuilding. Do not write what sounds impressive. *Write what is true.*

How To Use This Section

Start by asking:

What will this quarter require from me, and what capacity do I need to carry it well?

Then complete each capacity area with a specific goal.

Examples:

Capacity Area	Example Goal
Physical capacity	Sleep for 7 hours at least 4 nights per week and schedule 2 medical or wellness appointments I have been postponing.
Mental capacity	Reduce decision fatigue by choosing my top 3 priorities each week and eliminating unnecessary projects.
Emotional capacity	Stop carrying unresolved conversations alone and create space for support, therapy, prayer, journaling, or honest processing.
Relational capacity	Spend intentional time with people who restore me and set boundaries with relationships that consistently drain me.
Spiritual capacity	Return to a grounding practice that helps me feel connected, steady, and led.
Creative capacity	Protect 1 creative block each week for writing, speaking ideas, product development, or thought leadership.

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For leaders, entrepreneurs, caregivers, and high achievers who are ready to build success without abandoning themselves.

This quarter, I want to protect or rebuild:

Capacity Area	Goal
Physical capacity	
Mental capacity	
Emotional capacity	
Relational capacity	
Spiritual capacity	
Creative capacity	

My Capacity Score Today

Rate from 1 to 10:

Physical:

Mental:

Emotional:

Relational:

Spiritual:

Creative:

If any area is below a 5, do not ignore it. That area needs support, protection, simplification, or recovery before you add more pressure.

This Quarter, I Will Stop Draining Capacity

Use this section to name the patterns, habits, obligations, relationships, or business activities that are consuming capacity without creating enough return.

Examples:

- Saying yes before checking my real bandwidth.
- Accepting misaligned clients or opportunities.
- Overexplaining, overdelivering, or over-functioning.
- Working without recovery blocks.
- Keeping too many offers, projects, or ideas active at once.
- Avoiding hard conversations that would create relief.

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- Letting urgency override strategy.
- Creating content or visibility from pressure instead of purpose.

Suggested prompt:

What am I doing, tolerating, or carrying that is making this quarter heavier than it needs to be?

This Quarter, I Will Stop Draining Capacity By:

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This Quarter, I Will Rebuild Capacity By

Use this section to choose practical actions that restore your energy, confidence, focus, creativity, and resilience.

Examples:

- Scheduling recovery before the calendar fills.
- Creating a weekly CEO meeting to choose priorities.
- Protecting sleep, movement, nutrition, and quiet time.
- Asking for help at home, in business, or emotionally.
- Simplifying my offers, projects, or content rhythm.
- Returning to prayer, meditation, journaling, or spiritual grounding.
- Delegating or pausing low-return work.
- Creating space for joy, play, and creativity.

Suggested prompt:

What would restore even 10 percent of my capacity this quarter if I practiced it consistently?

This Quarter, I Will Rebuild Capacity By:

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Capacity First™ Reminder

Do not plan this quarter for the capacity you wish you had. Plan for the capacity you can honestly support, then build from there.

What must I stop carrying, simplify, protect, or restore so I can lead this quarter without abandoning myself?

**The goal is not to measure how much I survived. The goal
is to understand what helped me build sustainably.**

Quarterly Recovery Plan

Recovery Is a Business Strategy

Recovery is not what happens after burnout.
Recovery is what prevents burnout from becoming the operating system.

This section helps you define the recovery practices that will support your performance, leadership, revenue, creativity, and resilience this quarter.

Do not treat this section as a “wellness wish list”. Treat it as part of your quarterly business strategy. Your body, mind, relationships, spirit, and creativity are not separate from your work. They are the foundation that allows your work to continue.

Choose recovery commitments that are realistic, repeatable, and protective. The goal is not perfection. The goal is to build recovery into the rhythm of your life before exhaustion starts making decisions for you.

How To Complete This Section

Ask yourself:
What would help me remain steady, clear, energized, and connected this quarter?
Then write commitments that fit your actual season.

Examples:

Recovery Area	Example Commitment	Frequency
Sleep	Be in bed by 10:30 p.m. on work nights.	4 nights per week
Movement	Walk, stretch, or do gentle strength training.	3 times per week
Nutrition	Eat a real lunch instead of working through it.	5 days per week
Quiet time	Start the day without immediately checking messages.	Daily
Joy	Do something that feels light, beautiful, or fun.	Weekly
Play	Make room for non-productive pleasure.	2 times per month
Connection	Spend intentional time with someone who restores me.	Weekly
Spiritual practice	Pray, meditate, journal, worship, or sit in stillness.	Daily or weekly

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My Recovery Commitments

Use the table below to define what recovery will look like in each area this quarter. Keep your commitments specific enough to follow and simple enough to sustain.

Recovery Area	My Commitment	Frequency
Sleep		
Movement		
Nutrition		
Quiet time		
Joy		
Play		
Connection		
Spiritual practice		

My Recovery Non-Negotiables

Use this section to choose the three recovery practices that must be protected even during busy seasons.

These are not ideal habits. These are minimum standards.

Examples:

- I will not sacrifice sleep for non-urgent work.
- I will take at least 1 true recovery block each week.
- I will eat before making major decisions or taking sales calls.
- I will protect one quiet morning or evening each week.
- I will not allow back-to-back workdays to erase movement, meals, or spiritual grounding.
- I will pause before saying yes when my capacity is already low.

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A strong completed example:

My recovery non-negotiables are sleep, quiet time, and weekly connection. If those 3 disappear, I know my capacity is at risk.

My Recovery Non-Negotiables:

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What Usually Gets in the Way

This section is where the user should name the patterns that interfere with recovery before they happen.

Common examples:

- Client urgency
- Family or caregiving needs
- Overcommitting
- Guilt when resting
- Poor calendar boundaries
- Saying yes too quickly
- Travel
- Launches
- Financial pressure
- Emotional labor
- Unclear work hours
- Checking messages too early or too late

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Suggested prompt:

What usually convinces me that recovery can wait?

The answer matters because the obstacle is rarely lack of awareness. It is usually lack of protection.

My Protection Plan

Use this section to create a simple response plan for high-pressure weeks. The goal is not to avoid every demanding season. The goal is to prevent demanding seasons from becoming your default operating system.

Examples:

- Move recovery onto the calendar before accepting new commitments.
- Reduce non-essential meetings.
- Ask for help earlier.
- Renegotiate deadlines instead of silently absorbing pressure.
- Pause low-return content, admin, or visibility activities.
- Protect sleep before adding more work.
- Communicate capacity limits clearly.
- Use the Resilience Reset™ before reacting.

A strong, completed example:

When recovery is at risk, I will pause before adding more to the calendar, identify what can be delayed or delegated, protect sleep first, and ask: What would restore 5 percent of my capacity today?

When recovery is at risk, I will:

- 1.
- 2.
- 3.

If my business, leadership, or life requires me to ignore recovery indefinitely, I need to redesign my system.

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Quarterly Visibility Plan

How I Will Be Seen This Quarter

Visibility creates opportunity. Capacity decides which opportunities are worth accepting.

Channel	Quarterly Focus	Frequency
Podcast		
Email list		
LinkedIn		
Instagram		
Speaking		
Media		
Partnerships		

My Visibility Message

This quarter, I want people to know me by:

My Core Topics

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My Visibility Boundary

I will not perform online at the expense of:

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Quarterly Sales Focus

My Primary Sales Priority

This quarter, I am selling:

My Best Buyers

Buyer Type	Need	Offer
Individual		
Corporate		
Event planner		
Sponsor		
Partner		

Sales Activities That Matter

Activity	Weekly Target
Outreach messages	
Sales calls	
Proposals sent	
Follow ups	
Referrals requested	
Offers made	

Capacity First™ Sales Question

What is the simplest path to qualified revenue this quarter?

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Quarterly Project Map

Active Projects

Project	Status	Deadline	Revenue Impact	Capacity Cost	Decision
1			High / Medium / Low	High / Medium / Low	Keep / Pause / Delegate
2			High / Medium / Low	High / Medium / Low	Keep / Pause / Delegate
3			High / Medium / Low	High / Medium / Low	Keep / Pause / Delegate
4			High / Medium / Low	High / Medium / Low	Keep / Pause / Delegate

My True Priority Project

If only 1 project could move forward this quarter, it would be:

Why This One Matters Most

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Quarterly Stop Doing List

What I Am No Longer Available For

A resilient quarter requires subtraction.

This section helps you protect your quarter from becoming overcrowded, overextended, and driven by pressure instead of wisdom.

Most people do not burn out because they lack goals. They burn out because they keep adding without subtracting. They say yes to new projects without removing old obligations. They chase visibility without protecting recovery. They tolerate people, platforms, patterns, and priorities that quietly drain the capacity they need to lead well.

This page is where you practice **strategic subtraction**.

Use it to name what you are no longer available for this quarter. This may include habits, commitments, offers, clients, platforms, expectations, unpaid labor, emotional patterns, or business activities that consume more capacity than they return.

This is not about quitting everything. It is about creating enough space for the right things to work.

How To Use This Section

Look back at your quarterly objectives, big rocks, revenue goal, capacity goal, recovery plan, visibility plan, sales focus, and project map.

Then ask:

What cannot come with me into this quarter if I want to build success in a way I can sustain?

Be specific. A strong **Stop Doing List** does not say, “I will stop being overwhelmed.” It says, “I will stop accepting calls without a clear agenda,” or “I will stop creating content for platforms that do not create revenue, relationships, or strategic visibility.”

The goal is to identify the activities and patterns that look productive but quietly drain your capacity.

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I Will Stop

Use this table to name what you are choosing to stop, why it matters, and what you will do instead.

Examples

I Will Stop	Because	What I Will Do Instead
Saying yes to unpaid opportunities without a clear purpose	It drains time and does not always create revenue or visibility	Use a visibility filter before accepting
Checking messages before I have led my morning	It puts me in reaction mode	Start with my Daily CEO Page first
Building too many offers at once	It splits my focus and slows revenue	Prioritize 1 primary offer this quarter
Overdelivering beyond the scope of paid work	It creates resentment and capacity drain	Define scope clearly and charge for additional work
Posting on platforms that drain me	It consumes energy without clear return	Focus on the platform that best supports my audience and offers

My “I will stop” table

I Will Stop	Because	What I Will Do Instead

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Capacity Leaks I Am Closing

Capacity leaks are the hidden drains that slowly weaken your focus, energy, revenue, and resilience.

They may not look urgent, but they cost you over time.

Use this section to name the leaks you are closing this quarter.

Examples:

- Unclear client boundaries
- Too many meetings
- Underpriced offers
- Unpaid emotional labor
- Overexplaining decisions
- Content creation without strategy
- Saying yes out of guilt
- Waiting too long to follow up
- Keeping projects open that should be paused
- Carrying responsibilities that require shared ownership

The capacity leaks I am closing this quarter are:

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People, Patterns, or Platforms That Drain Me

This section is for honest awareness, not blame.

- Some people drain you because the relationship needs a boundary.
- Some patterns drain you because they are old survival strategies.
- Some platforms drain you because they reward performance instead of alignment.

Use this space to name what consistently leaves you depleted, distracted, resentful, reactive, or disconnected from your priorities.

Ask:

- Who or what consistently pulls me away from my real priorities?
- Where am I performing instead of leading?
- What makes me feel resentful, scattered, or overextended?
- What am I tolerating because I do not want to disappoint someone?
- Which platforms create pressure without meaningful return?
- Which relationships need clearer expectations?

Write honestly. You do not have to make a dramatic decision today. You only need to tell the truth.

My Boundary Statement

This is the most important part of the page.

Your boundary statement should be clear, grounded, and practical. It should name how you are protecting your capacity this quarter.

Use this structure:

This quarter, I am protecting my capacity by no longer available for [pattern, pressure, or behavior], so I can focus on [priority, value, revenue goal, recovery need, or leadership standard].

Examples

This quarter, I am protecting my capacity by no longer accepting last minute requests that are not urgent, aligned, or mutually respectful. I am creating space for focused revenue work, recovery, and strategic leadership.

This quarter, I am protecting my capacity by pausing projects that do not support my primary revenue goal. I am choosing depth over distraction.

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This quarter, I am protecting my capacity by limiting access to my time, energy, and expertise unless the opportunity is aligned, paid, strategic, or restorative.

This quarter, I am protecting my capacity by:

Every yes requires capacity. If I do not choose what to stop, pressure will choose for me.

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Quarterly Support Needs

A resilient quarter is not built by carrying everything alone.

This section helps you name the support your goals, capacity, business, home life, health, and leadership require this quarter.

Support is not weakness. Support is structure. It is how ambitious people build without burning out. If your quarterly goals require more energy, focus, execution, caregiving, visibility, sales, recovery, or emotional bandwidth than you realistically have, the answer is not always to push harder. Sometimes the answer is to ask sooner, delegate more clearly, or stop pretending that everything is yours to carry.

Use this section to identify where support would create more ease, revenue, recovery, clarity, and sustainability.

This is not only about hiring help. Support may come from a team member, contractor, partner, spouse, family member, friend, coach, therapist, doctor, mentor, collaborator, assistant, community, or system.

The goal is to stop treating support as an emergency response and start making it part of your quarterly strategy.

How To Use This Section

Review your quarterly objectives, revenue goal, capacity goal, recovery plan, project map, and **Stop Doing List**.

Then ask:

What kind of support would make this quarter more sustainable, profitable, peaceful, or focused?

Be honest. Do not only write what feels easy to ask for. Write what is needed.

Some support needs may be practical, like help with admin, marketing, scheduling, childcare, meals, inbox management, sales follow-up, bookkeeping, or content production.

Some support needs may be emotional, like encouragement, accountability, therapy, spiritual grounding, friendship, or hard conversation.

Some support needs may be physical or recovery-based, like medical appointments, movement, rest, nutrition, sleep support, or protected time away from work.

A strong support plan does not say, “I need help with everything.” It says, “I need 5 hours a week of admin help,” or “I need my family to protect two writing blocks each week,” or “I need a sales consultant to help me follow up on corporate leads.”

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What I Need Help With

Use the table below to name the specific area, the kind of support needed, and who may be able to help.

Area	Support Needed	Who Can Help
Business operations		
Marketing		
Sales		
Admin		
Home		
Family or caregiving		
Emotional support		
Health and recovery		

Examples

Area	Support Needed	Who Can Help
Business operations	Set up systems, organize files, improve workflow	VA, operations consultant, assistant
Marketing	Repurpose podcast content into posts and emails	Content assistant, contractor, marketing support
Sales	Follow up with leads and organize pipeline	Sales consultant, CRM support, accountability partner
Admin	Calendar, inbox, scheduling, document prep	VA, assistant, intern
Home	Meals, errands, cleaning, household management	Partner, family, paid household support
Family or caregiving	Shared responsibilities, appointments, backup care	Family member, caregiver, community support

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Area	Support Needed	Who Can Help
Emotional support	Processing stress, encouragement, accountability	Therapist, coach, trusted friend, mentor
Health and recovery	Sleep, movement, appointments, rest protection	Doctor, trainer, therapist, wellness provider

Delegation Opportunities

Delegation is not only about getting tasks off your list. It is about protecting the capacity required for your highest-value work.

This quarter, look for tasks that are:

- Repetitive
- Draining
- Outside your strengths
- Below your revenue-producing role
- Delaying important work
- Creating resentment
- Keeping you from rest, strategy, sales, or leadership

Ask:

- What am I doing that someone else could do well enough?
- What am I holding because I do not trust support yet?
- What would free up the most capacity if I stopped doing it myself?
- What task is costing me more in energy than it would cost to delegate?
- What am I avoiding because the process needs help?

This quarter, I can delegate:

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Support for Which I Need to Ask

Many capacity leaks continue because the needed conversation never happens.

This section helps you turn the support need into a real request.

Do not make the request vague. Do not expect people to guess. Ask clearly, specifically, and respectfully.

A strong request includes:

- What you need
- Why it matters
- When you need it
- What support would look like
- Whether it is temporary, recurring, or ongoing

Conversation

Use this space to name the conversation you may be avoiding or delaying.

Examples:

- I need to ask for more help at home.
- I need to tell a client the current scope is no longer sustainable.
- I need to ask a contractor to take ownership of a recurring task.
- I need to talk to my family about protected work or recovery time.
- I need to ask for emotional support instead of pretending I am fine.
- I need to speak with a medical, mental health, or wellness professional about what I am carrying.

The conversation I need to have is:

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The person I need to ask is:

Name the person clearly.

This may be:

- Partner or spouse
- Family member
- Friend
- Assistant
- Contractor
- Coach
- Therapist
- Doctor
- Mentor
- Collaborator
- Client
- Team member
- Community member

The request I need to make is:

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Use this structure:

I need support with [specific area] because [why it matters]. This quarter, would you be willing to [specific request] by [timeframe or frequency]?

Examples

I need support with household responsibilities because my current workload and caregiving load are not sustainable. This quarter, would you be willing to take ownership of dinner 2 nights a week and school pickup on Thursdays?

I need support with admin because scheduling and inbox management are consuming time I need for sales and client delivery. This quarter, I would like to delegate 5 hours per week of admin support.

I need support with emotional bandwidth because I have been carrying too much alone. This quarter, I need a weekly check-in where I can be honest without having to perform strength.

I need support with recovery because I am noticing signs of burnout. This quarter, I am scheduling medical and wellness appointments and protecting 1 recovery block each week.

Capacity First™ Reminder

Support is not a sign that I cannot handle my life. It is a sign that I am building a life that deserves to be held well. I do not have to carry everything to prove I am capable.

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Quarterly Scorecard

End of Quarter Review

This page is your quarterly truth check.

Before you move into the next season, pause and look at what happened. Not what you hoped would happen. Not what you meant to do. Not what looked productive from the outside. What created revenue, profit, opportunities, audience growth, recovery, and sustainable momentum?

The purpose of this scorecard is not self-judgment. It is leadership discernment.

A resilient CEO does not only measure effort. She measures outcomes, capacity cost, and return. This page helps you see which activities moved the business/endeavor forward, which opportunities are worth repeating, and which patterns consumed too much energy without producing enough value.

Use this page at the end of every quarter before completing your **Quarterly Reflection**.

How To Use This Section

Review the goals you set earlier in the quarter, especially your:

- Quarterly Objectives
- Key Results
- Quarterly Revenue Goal
- Quarterly Capacity Goal
- Quarterly Visibility Plan
- Quarterly Sales Focus
- Quarterly Project Map
- Quarterly Support Needs

Then complete the table honestly.

In the **Goal** column, write the target you set at the beginning of the quarter.

In the **Actual** column, write what happened.

In the **Notes** column, capture the story behind the number. Did you miss the goal because the strategy was wrong, the offer was unclear, the sales pipeline was too thin, your capacity was too low, or your support system was not strong enough? Did you exceed the goal because one offer, relationship, event, or message created unexpected momentum?

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The numbers are not here to shame you. They are here to teach you.

Category	Goal	Actual	Notes
Revenue	\$	\$	
Profit	\$	\$	
Leads			
Sales calls			
Proposals			
Speaking opportunities			
Corporate opportunities			
Products sold			
Audience growth			
Capacity score			
Recovery consistency			

What Each Category Tells You

Category	What To Look For
Revenue	Did the business generate the money you intended to create?
Profit	Did the revenue support the business and your life?
Leads	Did enough new people or organizations enter your ecosystem?
Sales calls	Did you create enough direct sales conversations?
Proposals	Did serious opportunities move into decision stage?
Speaking opportunities	Did your visibility create invitations, applications, or bookings?
Corporate opportunities	Did organizations, HR leaders, teams, or decision-makers show interest?
Products sold	Did your scalable offers convert?

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Category	What To Look For
Audience growth	Did your visibility expand your reach with the right people?
Capacity score	Did your capacity improve, hold steady, or decline?
Recovery consistency	Did you protect recovery as part of the strategy?

What Created the Most Revenue or Impact?

Use this section to identify the cleanest path to money.

Ask:

- Which offer generated the most revenue?
- Which client, customer, buyer, or organization created the strongest return?
- Which sales activity worked best?
- Which relationship, event, platform, or referral source produced money?
- What was simple, repeatable, and worth doing again?
- What looked busy but did not convert?

Write the activities, offers, relationships, or decisions that most directly created revenue this quarter.

This quarter, the most revenue came from:

What Created the Most Momentum?

Momentum is not always immediate revenue. Sometimes momentum looks like visibility, trust, referrals, strategic relationships, audience growth, corporate conversations, stronger positioning, or a clearer offer.

Ask:

- What opened doors?
- What increased visibility?

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- What made people understand my work more clearly?
- What created new relationships or opportunities?
- What strengthened my authority?
- What made the next right step easier?

This quarter, the most momentum came from:

What Consumed Capacity Without Return?

This is one of the most important questions in the playbook.

Some activities cost more than they create. They may consume emotional energy, time, creativity, attention, money, or physical capacity without producing enough revenue, alignment, relationship value, visibility, or joy.

Ask:

- What drained me without creating meaningful results?
- What did I keep doing because I felt obligated?
- What took more time than expected?
- What created stress but not revenue?
- What looked like an opportunity but became a capacity leak?
- What needs to be stopped, simplified, delegated, paused, or renegotiated next quarter?

This quarter, capacity was consumed without enough return by:

Capacity First™ Reminder

**Revenue matters. Momentum matters. Capacity matters.
A successful quarter must make room for all three.**

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Quarterly Reflection

This section is where you turn the quarter into wisdom.

The scorecard showed you what happened. This reflection helps you understand why it happened, what it cost, what it created, and what needs to change before the next quarter begins.

Do not rush this page. This is not about judging yourself. It is about learning how you lead, sell, create, recover, decide, overextend, and build.

A resilient CEO does not repeat patterns blindly. She studies the quarter with honesty so the next one can be wiser, cleaner, more profitable, and more sustainable.

Use this page after completing your **Quarterly Scorecard**.

How To Use This Section

Review your quarterly goals, revenue results, capacity score, recovery consistency, relationships, opportunities, and emotional patterns.

Then answer each prompt with honesty.

Look for three things:

- What created value
- What consumed capacity
- What needs to change before the next quarter begins

Your quarter does not need to be perfect to be useful. It only needs to be examined.

What I Learned This Quarter

The biggest lesson from this quarter was:

Reflection Prompts

Use these if you need help getting started:

- What did this quarter reveal about how I work?
- What did this quarter reveal about how I sell?
- What did this quarter reveal about how I protect or ignore my capacity?
- What did this quarter teach me about my business model, offers, audience, or support needs?

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- What lesson keeps repeating that I can no longer ignore?

What Worked

List the strategies, decisions, offers, relationships, habits, boundaries, messages, systems, or recovery practices that supported your revenue, momentum, leadership, or capacity.

This is what worked:

-
-
-

Consider

- What created revenue?
- What created ease?
- What helped me feel clear?
- What helped me protect energy?
- What produced results worth repeating?
- What felt aligned and effective?

What Did Not Work

List the activities, decisions, patterns, offers, systems, habits, or relationships that did not produce enough return for the capacity they required.

What did not work:

-
-
-

Consider

- What took too much effort for too little return?
- What created confusion?

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- What drained emotional energy?
- What did I keep forcing?
- What looked productive but did not move the business forward?
- What needs to be simplified, paused, delegated, renegotiated, or released?

Who Energized Me

Explain why so you can identify this earlier for maximum benefit.

The people who energized me this quarter were:

They energized me because:

Look For

- Who made me feel clearer, stronger, braver, or more supported?
- Who brought opportunity, encouragement, wisdom, peace, or momentum?
- Who respected my boundaries?
- Who helped me think better?
- Who created mutual value instead of hidden labor?

Capacity First™ Insight

People are part of your capacity system. The right people expand your energy, clarity, courage, and opportunity.

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Who Depleted Me?

Explain why so you can recognize this earlier next time you encounter this experience.

The people, relationships, rooms, or dynamics that depleted me this quarter were:

They depleted me because:

Look For

- Who required too much emotional management?
- Who ignored boundaries?
- Who created urgency without ownership?
- Who took more than they contributed?
- Who left me feeling smaller, resentful, anxious, obligated, or exhausted?
- What pattern did I participate in that I need to recognize earlier next time?

Capacity First™ Insight

Depletion is data. It does not always mean someone is bad or wrong. It means the dynamic needs attention, boundaries, distance, clarity, or a different structure.

What Should I Stop Carrying?

This question is about releasing what no longer belongs in your hands.

I need to stop carrying:

Consider

- Responsibilities that need shared ownership
- Emotional labor that is not yours to hold
- Offers that are no longer aligned
- Projects that are draining too much capacity
- Expectations that were never clearly agreed to
- Guilt, comparison, perfectionism, or pressure

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- Relationships that require you to abandon yourself
- Business activities that do not create revenue, momentum, impact, or joy

Capacity First™ Prompt

If I stopped carrying this, what capacity would return to me?

What Deserves More Attention Next Quarter?

This is where you choose what needs more focus, care, structure, or investment in the next 90 days.

Next quarter, I need to give more attention to:

Consider

- The offer that is working
- The audience that is responding
- The relationship that could open doors
- The revenue stream with the cleanest path
- The boundary that would protect your energy
- The support system you keep postponing
- The recovery practice that actually restores you
- The message, platform, or opportunity that is gaining traction

CEO Question

What would create the greatest return if I gave it more focused attention next quarter?



Capacity First™ Closing Reflection

Did I build success in a way I can sustain? Yes / No / Not yet

If not yet, what needs to change before the next quarter begins?

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Consider

- Do I need fewer priorities?
- Do I need stronger boundaries?
- Do I need more support?
- Do I need to raise prices?
- Do I need to simplify my offers?
- Do I need to stop saying yes too quickly?
- Do I need to protect recovery before adding more?
- Do I need to plan the next quarter around my real life, not my ideal capacity?

My Closing Statement

This quarter taught me:

I am allowed to take the lesson without carrying the shame.

**Every quarter gives you data. The goal is to use it with honesty,
wisdom, and capacity.**

**I do not have to repeat what depleted me. I can build the next
quarter differently.**

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Part 5: Monthly CEO Dashboard

Part 5 is strong because it turns each month into a leadership checkpoint, not just a planning spread. It keeps you focused on revenue, visibility, pipeline, capacity, and recovery without making the system feel heavy.

Monthly CEO Dashboard

This month is not about doing more.

It is about leading what matters.

Capacity First™ Principle

A sustainable business is not built by chasing every opportunity.

It is built by choosing the right priorities and protecting the capacity required to execute them.

Month at a Glance

Month

Month:

Quarter:

Monthly theme:

My Focus for This Month

This month is about:

My 3 Words for This Month

-
-
-

What I Am Building

This month, I am building:

What I Am Releasing

This month, I am no longer carrying:

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Capacity First™ Check

Before I plan this month, I need to be honest about:

Area	Current Reality
Energy	
Time	
Emotional bandwidth	
Family or caregiving demands	
Business pressure	
Recovery needs	

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Monthly CEO Dashboard

The CEO View

This is your monthly command center.

The CEO does not measure the month by the degree of busy”ness”. The CEO measures the month by what created revenue, what created momentum, what protected capacity, and what needed a decision.

How To Use This Section

Use this section at the beginning of the month to set your targets, then return to it at the end of the month to record what happened.

This dashboard helps you see the truth without shame or spin.

Not everything needs your attention this month. But the right things do.

At the start of the month, complete the **Monthly Target** column.

At the end of the month, complete the **Actual** column.

Use the **Notes** column to capture what the numbers are telling you.

Look for patterns:

- Where did money come from?
- Where did momentum increase?
- Where did opportunities stall?
- Where did your capacity get consumed?
- What needs a decision before the next month begins?

The goal is not perfect numbers. The goal is clear leadership

Category	Monthly Target	Actual	Notes
Revenue	\$	\$	
Profit	\$	\$	
New leads			

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Category	Monthly Target	Actual	Notes
Sales calls			
Proposals sent			
New clients or customers			
Speaking opportunities			
Corporate opportunities			
Podcast growth			
Email list growth			
Capacity score			
Recovery consistency			

What These Numbers Tell Me

Revenue shows what came in.

Profit shows what was kept.

Leads show whether visibility is creating interest.

Sales calls show whether interest is becoming conversation.

Proposals show whether conversations are turning into opportunity.

New clients or customers show whether the business is converting.

Speaking and corporate opportunities show whether authority is growing.

Podcast and email list growth show whether the audience ecosystem is expanding.

Capacity score shows whether the business is being built sustainably.

Recovery consistency shows whether performance is being supported or forced.

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This Month's CEO Question

What is the most important decision I need to make this month?

Decision Prompts

If you are not sure, ask:

- What decision would make this month be simpler?
- What decision would create revenue faster?
- What decision would protect my capacity?
- What decision have I been avoiding?
- What decision would remove confusion from my business or life?

The Real Priority

If I could only accomplish one thing this month, it would be:

This matters because:

Capacity First™ Check

Does this priority match my actual capacity this month?

Yes / No / Not yet

If not yet, what needs to be adjusted?

This month does not need more pressure.

It needs clearer priorities, cleaner decisions, and protected capacity.

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Monthly Revenue Plan

Revenue with Discernment and Capacity

This section turns your monthly revenue goal into a focused action plan.

Revenue does not usually come from doing more random things. It comes from choosing the right offer, making the right “ask”s, following up with the right people, and focusing on the activities most likely to create income.

Use this section after completing your Monthly CEO Dashboard and before your Monthly Pipeline Review.

Your goal is not to chase every possible revenue stream this month. Your goal is to identify the cleanest, most aligned path to revenue based on your current offers, audience, opportunities, and capacity.

How To Use This Section

Start by reviewing your annual revenue goal from Page 45 and your quarterly revenue goal from Page 68.

Then choose the revenue sources that are realistic for this month.

Do not fill in every line just because it exists. Some months are for products. Some months are for corporate outreach. Some months are for speaking. Some months are for selling one strong offer repeatedly.

The CEO move is not doing everything.

The CEO move is choosing what is most likely to convert.

Monthly Revenue Goal

My revenue goal this month is: \$ _____

Minimum Revenue Number

The minimum revenue I need this month is: \$ _____

Stretch Revenue Number

The stretch revenue I would love to reach this month is: \$ _____

Why This Number Matters

This revenue goal matters because:

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Revenue Source Instructions

Use the *Goal* column to set the amount you want each source to contribute this month.

Use the *Offer* or *Activity* column to name the specific thing that will create the revenue.

Use the *Notes* column for names, deadlines, pricing, follow-ups, or decisions needed.

Revenue Sources

Revenue Source	Goal	Offer or Activity	Notes
Products	\$		
Coaching or consulting	\$		
Speaking	\$		
Corporate workshops	\$		
Sponsorships	\$		
Collaborations	\$		

Other	\$		
Total	\$		

Examples:

Revenue Source	Offer or Activity Example
Products	Sell 150 assessments at \$97 each
Coaching or consulting	Enroll 2 private clients
Speaking	Book 1 paid keynote
Corporate workshops	Send 10 workshop proposals

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Revenue Needle Movers

The 3 revenue activities that matter most this month are:

-
-
-

Needle Mover Test

A true revenue needle mover should connect to at least one of these:

Revenue Test	Yes / No
It makes a direct offer	
It follows up with a real lead	
It moves a proposal forward	
It books a sales conversation	
It sells or promotes a specific product	
It strengthens a high-value relationship	
It creates a qualified corporate, speaking, or sponsorship opportunity	

If the activity does not connect to revenue, relationship, visibility, or strategic momentum, it may be busy work.

Capacity First™ Revenue Filter

The simplest path to revenue this month is:

The revenue activity that may drain too much capacity is:

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The offer I should prioritize is:

Capacity and Revenue Check

Question

Answer

- Which revenue source has the highest likelihood of converting this month?
- Which offer creates the best revenue with the least delivery strain?
- Which opportunity already has momentum?
- Which activity am I avoiding even though it could create money?
- What should I pause because it is not likely to produce revenue this month?

CEO Revenue Decision

This month, I will focus my revenue energy on:

Because:

The first action I will take is:

By this date:

Closing Reminder

Revenue grows when attention becomes focused.

You do not need 10 scattered income ideas this month.

You need the right offer, the right people, the right follow-up, and the capacity to execute.

Monthly Pipeline Review

Money in Motion

Your pipeline shows where revenue is already moving, waiting, stalled, or ready to close.

This page helps you stop guessing about money and start leading your sales opportunities with clarity. A healthy pipeline does not require chasing everyone. It requires knowing who needs a next step, what each opportunity is worth, where it stands, and what action will move it forward.

The goal is not to pressure people; it's to support the right opportunities with clear, timely leadership.

Pipeline Snapshot

Opportunity	Type	Value	Stage	Next Step	Follow Up Date
		\$	Lead / Call / Proposal / Verbal Yes / Closed		
		\$	Lead / Call / Proposal / Verbal Yes / Closed		
		\$	Lead / Call / Proposal / Verbal Yes / Closed		
		\$	Lead / Call / Proposal / Verbal Yes / Closed		

Pipeline Stage Guide

Stage	What It Means	CEO Move
Lead	Possible opportunity identified	Qualify the need and fit
Call	Conversation booked or needed	Prepare clear offer and next question
Follow-Up	They need a response or reminder	Send direct follow-up
Proposal	Offer or pricing has been sent	Confirm decision timeline
Negotiation	Details, scope, or price are being discussed	Clarify value, terms, and next step
Verbal Yes	They have agreed but payment or contract is not complete	Send invoice, agreement, or onboarding step

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Stage	What It Means	CEO Move
Closed	Paid, signed, declined, or completed	Record outcome and next relationship step

Pipeline Reality Check

Question	Answer
Total potential pipeline value this month	\$
Number of active opportunities	
Number of proposals out	
Number of follow-ups needed	
Number of verbal yes opportunities not yet closed	
Number of opportunities likely to close this month	

Follow-Up List

The people or organizations I need to follow up with:

-
-
-
-
-
-

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Follow-Up Message Bank

Use one of these if you are avoiding the follow up.

Simple Follow-Up

Hi [Name], I wanted to follow up on our conversation about [offer/opportunity]. Is this still something you would like to move forward this month?

Proposal Follow-Up

Hi [Name], I'm checking in on the proposal I sent for [project/workshop/service]. Do you have any questions, or would it be helpful to schedule a quick call to talk through next steps?

Verbal Yes Follow-Up

Hi [Name], I'm excited to move forward. The next step is [invoice/contract/scheduling link]. Once that is complete, we can begin with [next step].

Reconnection Follow-Up

Hi [Name], you came to mind because we previously discussed [topic/opportunity]. If this is still a priority, I'd be happy to revisit what support could look like.

Pipeline Health

This month, my pipeline feels: Strong / Developing / Unclear / Too thin

Capacity First™ Pipeline Filter

The opportunity with the highest revenue potential is:

The opportunity with the easiest next step is:

The opportunity that may require too much capacity right now is:

The opportunity I should close, pause, or release is:

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CEO Reflection

Where is money already in motion that I need to support?

Where am I avoiding a sales conversation?

What follow-up would create the most momentum this week?

What opportunity needs a clear decision from me?

CEO Pipeline Rule

No opportunity should sit without a next step.

If there is no next step, it is not a pipeline. It is a hope list.

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Monthly Capacity Audit

Capacity Before Performance™

You cannot build a sustainable month by ignoring the condition of the person carrying it.

This page helps you pause and assess your real capacity before you continue pushing, planning, selling, leading, creating, or caregiving. Capacity is not just about time. It includes your energy, focus, emotional bandwidth, relationships, creativity, finances, faith, recovery, and support.

Use this audit at the beginning of each month, and again at the end of the month if you feel stretched, resentful, foggy, depleted, or disconnected from your work.

The goal is not to judge yourself.

The goal is to tell the truth early enough to make a wiser plan.

How To Use This Section

Rate each capacity area from **1 to 10** based on how available, supported, and sustainable that area feels right now.

Score	Meaning
8 to 10	Strong capacity
5 to 7	Strained capacity
3 to 4	At-risk capacity
1 to 2	Critical capacity deficit

After you score each area, answer two questions:

- **What is consuming it?**
Name the people, responsibilities, decisions, habits, pressures, systems, or emotions that are draining this area.
- **What would restore it?**
Name the support, boundary, recovery practice, decision, conversation, simplification, or resource that would help rebuild capacity.

This page works best when you answer honestly, not aspirationally.

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Capacity Audit

Capacity Area	Score	What Is Consuming It?	What Would Restore It?
Physical capacity			
Mental capacity			
Emotional capacity			
Relational capacity			
Spiritual capacity			
Creative capacity			
Financial capacity			

Capacity Area Guide

Use these definitions if you need help scoring each area.

Capacity Area	What To Consider
Physical capacity	Sleep, energy, health, movement, nutrition, body signals, recovery
Mental capacity	Focus, decision fatigue, clarity, concentration, overwhelm
Emotional capacity	Stress, resentment, grief, pressure, anxiety, emotional labor
Relational capacity	Family, caregiving, friendships, clients, team, support, conflict
Spiritual capacity	Faith, grounding, purpose, inner peace, meaning, alignment
Creative capacity	Ideas, expression, content, writing, speaking, imagination, inspiration
Financial capacity	Cash flow, money pressure, pricing, debt, income stability, support

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Burnout Risk Check

Check any that apply this month:

Sign

Check

I feel resentful more often than usual

I am tired even after resting

I am avoiding decisions

I am overworking but underproducing

I am saying yes when I mean no

I feel disconnected from joy

I am neglecting my body

I am carrying too much alone

Burnout Risk Guidance

If you checked **1 to 2 signs**, pay attention. Something is asking for adjustment.

If you checked **3 to 4 signs**, your capacity is likely strained. Choose 1 boundary, 1 recovery action, and 1 support request this week.

If you checked **5 or more signs**, do not simply push harder. Reduce nonessential demands, ask for support, and consider speaking with a qualified medical, mental health, or wellness professional if stress, exhaustion, or distress feels significant.

This page is not a diagnosis. It is a leadership checkpoint.

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Capacity First™ Reflection

The biggest capacity leak this month is:

The boundary I need most is:

The support I need to ask for is:

One thing I need to stop carrying alone is:

One thing I can simplify this month is:

CEO Capacity Decision

Based on this audit, this month I need to:

Circle one: Continue / Simplify / Delegate / Renegotiate / Pause / Release / Ask for Support

My next right action is:

Capacity First™ Reminder

My capacity is not separate from my performance.

My capacity is the source of my performance.

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Monthly Content and Visibility Plan

Visibility With Capacity, Discernment, and Purpose

Content is not the goal. Visibility is not the goal.

The goal is to become known for the right message by the right people in a way that supports your revenue, relationships, leadership, and capacity.

Use this page to choose what you want to be known for this month, what message you will repeat, which content pillars you will use, and which visibility actions deserve your energy.

You do not need to be everywhere.

You need to be clear, consistent, and strategic in the places that matter most.

How To Use This Section

Complete this page at the beginning of the month after reviewing your revenue plan, pipeline, and capacity audit.

Before choosing content topics, ask:

- What am I selling or promoting this month?
- Who needs to hear from me this month?
- What do I want to become known for?
- What content will create trust, demand, or opportunity?
- What visibility actions can I sustain without draining my capacity?

This page works best when you choose fewer messages and repeat them with more authority.

Visibility Focus

This month, I want people to remember me by:

Examples:

- Helping high-achievers build success without burnout
- Teaching Capacity Before Performance™
- Supporting caregivers who are carrying business and life load

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- Sustainable performance for women leaders
- Building revenue without self-abandonment
- Resilience as a leadership strategy

Core Message

My main message this month is:

Your core message should be simple enough to repeat all month.

A strong message usually connects:

Element	Question
Problem	What is my audience struggling with?
Belief shift	What do they need to understand differently?
Promise	What can change when they apply my work?
Invitation	What should they do next?

Message Builder

This month, I want my audience to understand (that):

Because:

And the next step I want them to take is:

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Content Pillars

Use these pillars to organize your ideas. You do not need to create content for every pillar every week. Choose the ones that best support your current offer, visibility goal, and capacity.

Pillar	Topic Ideas
Resilience	
Capacity	
Sustainable performance	
Leadership	
Caregiving or life load	
Business growth	

Content Pillar Guide

Pillar	What To Create
Resilience	Stories, lessons, recovery practices, identity shifts, overcoming pressure
Capacity	Capacity audits, boundaries, energy leaks, support needs, Capacity First™ decisions
Sustainable performance	How to achieve without burnout, recovery as strategy, better planning rhythms
Leadership	CEO decisions, visibility, standards, communication, leading yourself first
Caregiving or life load	Real-life responsibility, emotional labor, support systems, asking for help
Business growth	Revenue activities, offers, pipeline, speaking, corporate, content that sells

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Visibility Actions

Choose the visibility channels that support your business this month. Do not fill every row out of obligation. Use this section to make a strategic visibility plan, not a content burden.

Channel	Monthly Plan	Frequency
Podcast		
Email		
LinkedIn		
Instagram		
Speaking outreach		
Media outreach		
Collaborations		

Visibility Action Guide

Use this guide if you need help deciding what each channel should do.

Channel	Best Use
Podcast	Build authority, deepen trust, create thought leadership, feature aligned guests
Email	Nurture buyers, sell offers, share personal insight, drive action
LinkedIn	Reach professionals, corporate buyers, event planners, partners
Instagram	Build emotional connection, community, visibility, brand familiarity
Speaking outreach	Pitch events, podcasts, panels, conferences, associations, corporate rooms
Media outreach	Build credibility through interviews, articles, features, expert commentary
Collaborations	Borrow trust through aligned partners, joint lives, referrals, podcast swaps

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Capacity First™ Visibility Boundary

This month, I will not create content at the expense of:

Examples:

- My sleep
- My recovery
- My family
- My paid client delivery
- My nervous system
- My integrity
- My deeper work
- My body
- My joy
- My most important revenue activity

CEO Visibility Decision

This month, my most important visibility action is:

The message I will repeat most often is:

The channel I will prioritize is:

The channel I will pause, reduce, or simplify is:

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Capacity First™ Reminder

I do not need to perform everywhere.

I need to be visible where my message, audience, revenue, and capacity align.

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Monthly Recovery Plan

Recovery Is Part of the Strategy

Recovery is not separate from your revenue, leadership, visibility, creativity, or impact.

It is what allows those things to continue.

This month, you are not waiting until you are depleted to rest. You are deciding in advance what your body, mind, spirit, relationships, and nervous system will need to sustain the work you are building.

Use this page after completing your **Monthly Capacity Audit** and **Monthly Content and Visibility Plan**. Your recovery plan should reflect the real demands of the month ahead, not an ideal version of your calendar.

If this month requires more selling, speaking, caregiving, creating, travel, emotional labor, decision-making, or visibility, then this month also requires more intentional recovery.

Capacity comes before performance.

Recovery protects capacity.

How To Use This Section

Before filling this out, review:

- Your monthly revenue goal
- Your pipeline demands
- Your visibility commitments
- Your current capacity scores
- Your biggest burnout risk
- Your family, caregiving, health, or life load this month

Then ask:

What kind of recovery would make this month sustainable?

Do not choose recovery commitments that look impressive. Choose the ones you will protect.

Start with the areas where your capacity is most strained.

If your physical capacity is low, prioritize sleep, movement, nutrition, and medical or wellness support.

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If your mental capacity is low, prioritize quiet time, simplified decisions, fewer tabs open, and protected focus.

If your emotional capacity is low, prioritize connection, therapy or support, journaling, prayer, solitude, or reducing unnecessary emotional labor.

If your relational capacity is low, prioritize honest conversations, support, boundaries, and time with people who restore you.

If your spiritual capacity is low, prioritize grounding, prayer, meditation, worship, nature, reflection, or meaning making.

Recovery Is Part of the Strategy

This month, recovery will support my performance by:

Examples:

- Helping me make clearer decisions
- Protecting my energy for revenue-producing work
- Reducing resentment and emotional exhaustion
- Supporting my body during a demanding season
- Giving me space to create, speak, lead, and sell from clarity
- Helping me show up for my family without abandoning myself
- Preventing burnout from becoming my operating system

Recovery Commitments

Choose realistic commitments. Small recovery practices protected consistently are more powerful than ambitious practices abandoned by week two.

Recovery Area	Commitment	Frequency
Sleep		
Movement		
Nutrition		
Quiet time		

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Recovery Area	Commitment	Frequency
Joy		
Play		
Connection		
Spiritual practice		

Recovery Commitment Guide

Use this guide if you need help choosing what to write.

Recovery Area	Examples
Sleep	Bedtime boundary, phone off by a certain time, 7 to 8 hours, no late-night work
Movement	Walking, stretching, strength training, dance, yoga, mobility, gentle movement
Nutrition	Protein with meals, hydration, meal prep, fewer skipped meals, supportive snacks
Quiet time	Morning stillness, no-input time, prayer, meditation, journaling, silence
Joy	Music, beauty, laughter, flowers, creativity, favorite places, small pleasures
Play	Unstructured time, games, art, dancing, hobbies, fun without productivity
Connection	Friend time, family time, support calls, honest conversations, community
Spiritual practice	Prayer, worship, scripture, meditation, nature, gratitude, reflection

My Non-Negotiable Recovery Practice

This month, I will protect:

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This is the practice that gets protected even when the month gets full.

It may be simple.

It may be small.

It may be private.

But it matters because it helps you stay connected to yourself while you build.

Examples:

- No work after 7 PM
- A 20-minute walk 4 times per week
- Sunday evening planning and reset
- 10 minutes of prayer every morning
- Therapy, coaching, or support group attendance
- 1 full evening without work, content, or clients
- Lunch away from my desk
- A weekly family, friendship, or spiritual connection point

My Resilience Reset™

When I feel overloaded, I will pause and ask:

- What am I carrying right now?
- What truly needs my attention?
- What can wait, be delegated, or be released?
- What would restore 5 percent of my capacity today?

My Reset Response

When I notice overload, my first reset action will be:

Examples:

- Step away from the screen for 5 minutes

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- Take 10 slow breaths
- Drink water and eat something nourishing
- Write down everything I am carrying
- Choose the next right action only
- Ask for help
- Move my body
- Pray, breathe, or sit in silence
- Cancel, delegate, or renegotiate one thing

Weekly Recovery Anchor

Each week, I will schedule:

A weekly recovery anchor is a protected appointment with your own capacity. It should go on the calendar before the week becomes crowded.

Examples:

- A weekly Sabbath or no-work block
- A nature walk
- A massage, therapy, coaching, or wellness appointment
- A quiet planning ritual
- A creative date
- A spiritual practice
- A family connection block
- A screen-free evening
- A half-day reset
- A meal prep or home reset block

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Capacity First™ Recovery Boundary

This month, I will not sacrifice recovery for:

Examples:

- Performative urgency
- Content creation
- Other people's lack of planning
- Unpaid emotional labor
- Overdelivering to prove my value
- Saying yes when my body has already said no
- Work that is not connected to revenue, purpose, or true responsibility

Monthly Recovery Statement

This month, I will remember:

Recovery is not a reward for exhaustion.

Recovery is part of how I lead.

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Monthly CEO Reflection

Month End Review

This section is not for judgment. It is for leadership.

At the end of each month, pause long enough to see what happened. Not what you hoped would happen. Not what you think you “should” have done. What created revenue, momentum, capacity, drain, clarity, and growth.

A sustainable business is not built by repeating patterns you never stop to review.

Use this section to study the month like a CEO. Look at the numbers. Look at the energy. Look at the relationships. Look at the decisions. Look at what worked, what did not work, and what needs to change before you carry the same pattern into next month.

The goal is not to shame yourself into doing more; it's to lead with more wisdom.

How To Use This Section

Before completing this reflection, review:

- Your **Monthly CEO Dashboard**
- Your **Monthly Revenue Plan**
- Your **Monthly Pipeline Review**
- Your **Monthly Capacity Audit**
- Your **Monthly Recovery Plan**
- Your weekly CEO reflections from the month

Then answer honestly. Look for patterns, not perfection.

Ask:

- What created results?
- What created unnecessary drain?
- What did I keep carrying that no longer belongs to me?
- What needs to be repeated, released, simplified, delegated, or repaired?

This reflection is how you turn experience into strategy.

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This month, I **created revenue** by:

Use this space to name the actions, offers, conversations, follow-ups, launches, proposals, referrals, content, speaking opportunities, or relationships that created income or moved money closer.

Examples:

- Following up with warm leads
- Making clear offers
- Sending proposals
- Selling the right product or service
- Nurturing corporate opportunities
- Hosting a workshop
- Speaking to the right audience
- Reconnecting with past clients
- Creating content that led to sales conversations

This month, I **created momentum** by:

Momentum may not always show up as immediate revenue, but it should move the business, brand, message, relationship, or opportunity forward.

Examples:

- Publishing consistently
- Clarifying an offer
- Strengthening a partnership
- Booking a podcast interview
- Improving a sales page
- Completing a project
- Making a decision I had been avoiding

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- Building trust with my audience
- Creating visibility around my message

This month, I **protected capacity** by:

Name the choices that helped you stay steady, supported, focused, and well.

Examples:

- Saying no
- Delegating
- Resting before depletion
- Protecting sleep
- Simplifying the calendar
- Asking for support
- Taking a recovery day
- Ending a draining commitment
- Honoring a boundary
- Choosing fewer priorities

This month, I **drained capacity** by:

This is not about blaming yourself. This is about identifying the patterns, people, projects, decisions, delays, or obligations that cost more than they returned.

Examples:

- Overcommitting
- Avoiding a hard conversation
- Undercharging

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- Working without recovery
- Saying yes too quickly
- Spending energy on low-value tasks
- Carrying emotional labor that was not mine
- Letting urgency override strategy
- Creating content without a clear purpose
- Chasing opportunities that were not aligned

What Worked

List what created revenue, momentum, clarity, alignment, support, joy, or capacity.

-
-
-

What Did Not Work

List what created confusion, delay, drain, resentment, underperformance, or unnecessary pressure.

-
-
-

People and Energy Review

Success is not only shaped by tasks and strategy. It is also shaped by the people, conversations, rooms, expectations, and relationships surrounding you.

Some people expand your capacity. On the other hand, some people consume it. This review helps you notice the difference.

Who energized me this month?

These may be clients, collaborators, friends, mentors, team members, family members, community members, or audiences who brought clarity, joy, opportunity, honesty, encouragement, or aligned momentum.

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Who depleted me this month?

Be honest without being cruel. Depletion may come from unclear expectations, emotional labor, misalignment, poor communication, repeated boundary violations, or relationships that require more than they return.

What conversations need to happen?

Examples:

- A boundary conversation
- A pricing conversation
- A scope conversation
- A follow-up conversation
- A repair conversation
- A delegation conversation
- A “no” conversation
- A clarity conversation
- A support conversation

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Stop, Start, Continue

Use this section to turn reflection into next month's leadership decisions.

Stop

Start

Continue

Stop

What must I stop doing because it is draining capacity, diluting focus, delaying revenue, or pulling me out of alignment?

Start

What must I begin doing because it would create revenue, recovery, clarity, support, or momentum?

Continue

What is working well enough to repeat, deepen, systemize, or protect next month?

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Capacity First™ Closing Question

Did I build this month in a way I can sustain? Yes / No / Not yet

If yes, what helped make it sustainable?

If not yet, what needs to change next month?

Consider:

- What needs to come off the calendar?
- What needs a stronger boundary?
- What needs to be delegated?
- What needs to be priced differently?
- What needs to be simplified?
- What support do I need to ask for?
- What recovery must be protected earlier next month?
- What opportunity is not worth the capacity cost?

Closing Statement

This month taught me:

Let this statement become the bridge into next month.

You are not starting over. You are leading with better information.

I do not have to carry every lesson as criticism.

I can carry it as wisdom.

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Part 6: Weekly CEO Dashboard

Weekly CEO Dashboard

This week is not about doing everything. It is about leading the right things.

The Weekly CEO Dashboard is where your monthly strategy becomes focused weekly execution.

This section helps you begin each week with clarity, discernment, and capacity awareness. Instead of reacting to every request, idea, opportunity, obligation, or emergency, you will decide what deserves your attention before the week starts pulling from you.

This is not a normal weekly planner.

A normal weekly planner asks:

What do I need to get done?

The Weekly CEO Dashboard asks:

What moves the business forward, and what capacity do I need to protect in order to lead well?

That shift matters.

Because a successful week is not measured by how many tasks you complete. It is measured by whether you moved the right priorities forward without abandoning your body, your peace, your relationships, or your leadership.

Use this section every Monday to set direction and every Friday to reflect, learn, and adjust.

You are not here to chase the week.

You are here to lead it.

Capacity First™ Principle

Your week should be built around the highest value actions, not the loudest demands.

Urgency will always try to take over your calendar. Other people's expectations will always try to become your priorities. Unfinished tasks will always compete for your attention.

But leadership requires discernment.

Before you fill the week, decide what matters most.

A successful week protects 3 things:

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- **Revenue**
- **Relationships**
- **Capacity**

Revenue matters because your business needs money in motion, not just activity.

Relationships matter because clients, collaborators, partners, audiences, team members, family, and community shape the quality of your life and work.

Capacity matters because your energy, clarity, resilience, and peace are not separate from your performance. They are the source of it.

How To Use This Section

Use the Weekly CEO Dashboard at the beginning and end of each week.

At the beginning of the week, use it to choose:

- Your Big 3 outcomes
- Your most important revenue activity
- The relationships that need attention
- The opportunities already in motion
- The capacity risks you need to plan around
- The recovery you need to schedule before depletion begins
- The boundaries, decisions, or delegations that will protect your week

At the end of the week, use it to reflect on:

- What created revenue
- What created momentum
- What protected capacity
- What drained capacity
- What worked
- What did not work
- What should be repeated, released, delegated, or changed next week

Do not use this section to create a longer task list.

Use it to make better leadership decisions.

Weekly CEO Standard

This week, I do not need to complete everything.

I need to complete what matters.

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I will not measure this week by how busy I was. I will measure it by whether I moved the needle, protected my capacity, honored my relationships, and led with clarity.

If a task does not support revenue, relationships, capacity, visibility, delivery, recovery, or meaningful momentum, I will question whether it belongs in this week.

Weekly Leadership Statement

This week, I will lead with discernment, protect my capacity, and focus on what moves the business forward.

Before You Begin This Week

Review your:

- Monthly CEO Dashboard
- Monthly Revenue Plan
- Monthly Pipeline Review
- Monthly Capacity Audit
- Monthly Recovery Plan
- Current client, corporate, speaking, product, or collaboration priorities

Then ask:

What is the most important thing this week needs from me?

Not what everyone wants from you. Not what fear is pressuring you to do. Not what looks productive but creates no real movement.

What does this week need from your leadership?

Capacity First™ Weekly Reminder

Your calendar is not just a container for tasks. It reflects what you are allowing to lead your life.

Build the week with intention. Protect what powers you. Choose the actions that create the most meaningful progress with the least unnecessary depletion.

A resilient week is not empty. **It is aligned.**

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Weekly Planning Prompts

Use these prompts before completing the weekly pages:

This week, the business needs me to focus on:

This week, my body and capacity need me to protect:

This week, revenue will be created or supported by:

This week, the relationship that deserves intentional attention is:

This week, I need to stop, pause, delegate, or renegotiate:

This week will be successful if:

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Monday CEO Meeting

Start the Week Like the CEO

Before I start “doing”, I will decide what deserves my attention.

Before you start doing, pause long enough to decide what deserves your attention.

The Monday CEO Meeting is your weekly leadership reset. This page is designed to help you step out of reaction mode and into discernment before the week begins pulling on your time, energy, focus, and capacity.

This playbook is not a traditional planner. It is a strategic operating system for sustainable performance. That means this section should not be used to create a longer task list. It should be used to choose what matters, what needs protection, and what must move forward.

A normal Monday asks:

What do I need to get done this week?

The Monday CEO Meeting asks:

What deserves my leadership this week?

That difference is the foundation of the Capacity First™ Method.

This page helps you begin the week by identifying your theme, choosing your top 3 CEO priorities, naming the one outcome that matters most, protecting your capacity in advance, and making the decision that will create the most clarity.

You are not here to chase the week. You are here to lead it.

Capacity First™ Principle

Your week should not be built from pressure, panic, or other people’s urgency. Your week should be built from wisdom.

Pressure says:

Do everything. Answer everyone. Prove yourself. Keep up.

Wisdom says:

Choose what matters. Protect what powers you. Move the needle. Lead with clarity.

This section gives you a moment to notice which voice is planning your week.

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If you are planning from pressure, the week will likely become overloaded before it begins. If you are planning from wisdom, you can choose fewer, stronger priorities that support revenue, relationships, recovery, and sustainable momentum.

How To Use This Section

Complete this page at the beginning of the week, ideally before checking messages, opening your inbox, or responding to other people's requests.

Use it as a 15-to-20-minute CEO meeting with yourself.

Move through the sections in order:

- **This Week's Theme**
Name what this week is about. This could be revenue, recovery, visibility, decision-making, delivery, simplification, family, healing, consistency, or completion.
- **My CEO Priorities**
Choose the 3 most important outcomes for the week. These should be outcomes, not random tasks. Each one should support your monthly goals, business momentum, capacity, or key relationships.
- **What Matters Most**
Identify the one thing that would make the week meaningful if nothing else went perfectly. This helps you avoid confusing busyness with progress.
- **What I Need to Protect**
Look honestly at the week ahead and name what needs protection before it becomes depleted. Your time, energy, focus, health, family or caregiving responsibilities, and creative capacity all matter.
- **CEO Decision**
Name the decision that needs to be made this week. A week often becomes heavy because one decision is being avoided.
- **Capacity First™ Check**
Ask whether you are planning from pressure, wisdom, or both. Then name what needs to shift.

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This Week's Theme

Use this space to give the week a clear identity.

Ask yourself:

What is this week really asking from me?

Examples:

- This week is about closing open loops.
- This week is about protecting my energy while delivering well.
- This week is about revenue-generating conversations.
- This week is about simplifying my schedule.
- This week is about visibility and follow-through.
- This week is about family, recovery, and only essential business actions.

Write one clear sentence.

This week is about:

My CEO Priorities

Choose only 3 outcomes.

These are the outcomes that deserve your best attention this week. They should be connected to revenue, visibility, delivery, relationships, strategic momentum, recovery, or capacity protection.

Do not list everything you could do.

List what would make this week successful.

The 3 most important outcomes for this week are:

- _____
- _____
- _____

Before finalizing them, ask:

- Do these priorities support my monthly CEO Dashboard?
- Do these priorities move revenue, relationships, visibility, delivery, or capacity forward?

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- Do I have the real capacity to complete these this week?
- What needs to come off my plate if these are truly the priorities?

What Matters Most

This is your leadership anchor for the week.

If the week gets full, complicated, emotional, or unpredictable, this is the thing you come back to.

If I only complete one thing this week, it should be:

Choose the thing that creates the greatest meaningful movement.

That may be a sales conversation, a proposal, a launch decision, a client delivery milestone, a health appointment, a caregiving need, a boundary conversation, or a recovery commitment.

The goal is not to pick what looks impressive.

The goal is to pick what actually matters.

What I Need to Protect

This section is where the Capacity First™ Method becomes practical.

Do not wait until you are depleted to protect your capacity. Name the protection before the pressure arrives.

Area	What Needs Protection
-------------	------------------------------

Time	
------	--

Energy	
--------	--

Focus	
-------	--

Health	
--------	--

Family or caregiving	
----------------------	--

Creative capacity	
-------------------	--

Use this section honestly.

Examples:

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Area	Example
Time	No unnecessary meetings before noon
Energy	No back-to-back calls without recovery space
Focus	Limit inbox and social media checking
Health	Protect sleep, meals, movement, appointments
Family or caregiving	Leave margin for family responsibilities
Creative capacity	Keep 2 quiet work blocks for writing or strategy

This is not about making the week perfect. It is about giving your leadership enough protection to function well.

CEO Decision

Every week has at least one decision that needs your leadership.

Avoided decisions consume capacity. They create mental clutter, emotional pressure, and stalled momentum.

Use this section to name the decision instead of carrying it silently.

The decision I need to make this week is:

Examples:

- Which offer am I prioritizing this week?
- Which opportunity am I saying no to?
- Which proposal needs to be sent?
- Which conversation needs to happen?
- What needs to be delegated?
- What can no longer stay on my calendar?
- What price, deadline, or boundary needs to be clarified?

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Capacity First™ Check

This is the most important question of the section.

Am I planning this week from pressure or from wisdom?

Pressure / Wisdom / Both

What needs to shift?

Then ask:

What needs to shift?

If the answer is pressure, do not judge yourself. Just adjust.

You may need to:

- Remove one priority
- Move a deadline
- Ask for support
- Protect recovery time
- Make a decision
- Say no sooner
- Simplify the revenue path
- Stop trying to carry what is not yours

Closing Reminder

This week does not need to prove your worth. This week needs your leadership.

Choose the work that matters. Protect the capacity required to do it well. Let the rest be questioned, delayed, delegated, simplified, or released.

CEO Standard:

I do not start my week by reacting.

I start my week by deciding what deserves my attention.

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Weekly Big Three

The Big Three

These are the 3 outcomes that would make this week successful.

The Weekly Big Three page helps you translate your monthly CEO Dashboard into focused weekly execution. This is where you stop treating every task as equally important and choose the 3 outcomes that deserve your time, energy, attention, and capacity this week.

The Weekly Big Three should not become a running task list. It should function as a leadership filter.

A traditional planner asks:

What do I need to get done?

The Weekly Big Three asks:

What 3 outcomes would make this week meaningful, profitable, aligned, or sustainable?

That shift matters.

You are not measuring the week by how much you completed. You are measuring the week by whether you moved the right things forward.

Capacity First™ Principle

Not everything that feels urgent deserves your capacity.

The Weekly Big Three protects you from scattered execution. It helps you choose the few priorities that support your monthly goal, revenue, visibility, capacity, or strategic momentum.

The goal is not to finish everything; the goal is to finish what matters.

Pressure says:

Do more. Catch up. Respond to everything. Prove you are productive.

Wisdom says:

Choose the 3 outcomes that create the greatest meaningful movement.

This section teaches the user to lead with discernment instead of defaulting to overcommitment.

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How To Use This Section

Complete this page after the **Monday CEO Meeting** and before filling in daily plans.

Use it to decide what deserves prime attention this week.

Move through the sections in order:

- **Choose the 3 outcomes**
These should be meaningful results, not random tasks.
- **Name why each priority matters**
If you cannot explain why it matters, it may not belong in your Big Three.
- **Identify the first action**
Every priority needs a clear starting point. Momentum begins with the next right action.
- **Check alignment with the monthly goal**
The week should support the month. If your weekly priorities are disconnected from your monthly CEO Dashboard, you may be planning from pressure instead of strategy.
- **Connect each priority to revenue, visibility, capacity, or momentum**
Each priority should serve at least 1 of these leadership categories.
- **Name what must not distract you**
Focus requires subtraction. Decide in advance what will not get to control your week.

Instructions

The Big Three

Choose the 3 outcomes that would make this week successful.

These should be outcome-based, not task-based.

Weak examples:

- Check email
- Post on social media
- Work on website

Stronger examples:

- Send 5 follow-ups to warm leads
- Complete the sales page for the Capacity Playbook
- Submit 3 speaking applications
- Finalize client proposal and send by Wednesday

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- Protect 3 recovery blocks this week
- Record 2 podcast episodes connected to my current offer

Use this table:

Priority	Why It Matters	First Action
1.		
2.		
3.		

How to Complete Each Column

Priority

Write the outcome you want completed or meaningfully advanced this week.

Ask:

- What would move the business forward?
- What would create revenue or sales momentum?
- What would protect my capacity?
- What would reduce mental clutter?
- What would make Friday feel successful?

Why It Matters

Name the reason this priority deserves capacity.

Examples:

- It supports this month's revenue goal.
- It creates visibility for my offer.
- It moves a client relationship forward.
- It reduces stress later in the month.
- It protects my health or recovery.
- It creates strategic momentum for the quarter.

First Action

Write the smallest clear action that starts movement.

Examples:

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- Draft the email.
- Open the proposal document.
- Make the list of 10 leads.
- Send the calendar link.
- Block the recovery time.
- Record the first 10 minutes.
- Review the monthly goal.

The first action should be simple enough that you can begin without needing another planning session.

Alignment Check

Do these priorities support my monthly goal? Yes / No / Partially

If the answer is **Yes**, continue.

If the answer is **Partially**, adjust at least 1 priority so the week better supports the month.

If the answer is **No**, pause. You may be planning from urgency, guilt, distraction, or someone else's expectations.

Ask:

What priority needs to be replaced so this week supports the month I said I was building?

Strategic Alignment Table

Do these priorities support revenue, visibility, capacity, or strategic momentum?

Priority	Revenue	Visibility	Capacity	Momentum
1.				
2.				
3.				

Check all that apply.

What Each Category Means

Revenue

This priority can create money, move a sale forward, support an offer, strengthen a pipeline, lead to a proposal, or improve conversion.

Examples:

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- Follow up with a corporate lead
- Launch the playbook
- Send invoices
- Make offers
- Book sales conversations

Visibility

This priority helps the right people see, understand, trust, or remember your work.

Examples:

- Pitch a podcast
- Send a speaking application
- Publish a strategic post
- Email your list
- Reach out for collaboration

Capacity

This priority protects or rebuilds your energy, health, clarity, boundaries, recovery, or support.

Examples:

- Cancel unnecessary meetings
- Schedule recovery time
- Ask for help
- Set a boundary
- Simplify delivery
- Protect sleep or medical care

Momentum

This priority moves an important project, decision, relationship, or system forward.

Examples:

- Finish a sales page
- Make a hiring decision
- Finalize a workshop outline
- Clean up the pipeline
- Complete a client deliverable

How to Interpret the Table

Each priority should connect to at least 1 category.

The strongest weekly priorities often connect to 2 or more.

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For example:

Priority	Revenue	Visibility	Capacity	Momentum
Send 5 follow-ups to warm leads	Yes			Yes
Record podcast episode about Capacity First™		Yes		Yes
Block 3 recovery windows			Yes	Yes

If a priority does not support revenue, visibility, capacity, or momentum, question whether it belongs in your Big Three.

That does not mean it is worthless. It may simply be maintenance, admin, or someone else’s urgency. Those things may still need to happen, but they should not automatically become the leadership focus of the week.

What Must Not Distract Me

This section is where you name the predictable distractions before they take over.

This week, I will not lose focus to:

-
-
-

Examples:

- Checking messages before choosing my revenue action
- Reworking something that is already good enough
- Saying yes to last-minute requests that are not aligned
- Consuming content instead of creating my own
- Avoiding sales conversations
- Letting someone else’s urgency become my operating system
- Rearranging low-value tasks to feel productive
- Starting a new idea before finishing the priority already chosen

This section matters because focus is not only about what you choose.

It is also about what you refuse to hijack your capacity.

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CEO Standard

I do not need to complete everything.

I need to complete what matters.

You are not being trained to chase productivity; you're training to lead.

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Weekly Big Three Worksheet

These are the 3 outcomes that would make this week successful.

Choose outcomes, not tasks. Your Big Three should support revenue, visibility, capacity, or strategic momentum. If everything feels important, pause and ask what moves the needle.

Priority	Revenue	Visibility	Capacity	Momentum
1.				
2.				
3.				

Alignment Check

Do these priorities support my monthly goal? Yes / No / Partially

If partially or no, what needs to be adjusted?

Do these priorities support revenue, visibility, capacity, or strategic momentum?

Priority	Revenue	Visibility	Capacity	Momentum
1.				
2.				
3				

What Must Not Distract Me

This week, I will not lose focus to:

- _____
- _____
- _____

CEO Standard

I do not need to complete everything.

I need to complete what matters.

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Weekly Revenue Needle Movers

Revenue Focus

This week's revenue goal is:

\$

This section is not about chasing every possible sale, opportunity, or idea.

It is about identifying the revenue actions that can create the most meaningful movement this week without creating unnecessary capacity drain.

Capacity First™ Principle

Revenue matters.

Capacity matters.

The right revenue action respects both.

Not every revenue opportunity deserves your energy this week. Some activities look productive but are really avoidance. Some opportunities look exciting but require more delivery, communication, emotional labor, or follow-up than your current capacity can support.

This page helps you choose revenue actions with discernment.

The goal is not to do every sales activity.

The goal is to do the right revenue activity with clarity, consistency, and enough capacity to follow through.

Most Important Revenue Activity

The one revenue activity that matters most this week is:

This should be the revenue action most likely to create money, sales momentum, qualified opportunity, or a next-step decision.

Examples:

- Follow up with 5 warm leads
- Send the corporate workshop proposal
- Make 3 direct offers for the Capacity Playbook
- Pitch 2 speaking opportunities
- Reconnect with 3 past clients
- Invite 10 people to a sales conversation
- Finalize the landing page and send it to the waitlist

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- Send 1 partnership proposal
- Record and send a personalized corporate outreach video

Revenue Needle Movers

These are the revenue-producing actions that deserve attention this week.

Activity Offer	Potential Value	Deadline	Status
	\$	Not started / In progress / Sent / Followed up / Closed	
	\$	Not started / In progress / Sent / Followed up / Closed	
	\$	Not started / In progress / Sent / Followed up / Closed	

How to Complete This Section

Activity

Write the specific revenue action, not a vague intention.

Weak example:
“Work on sales.”

Stronger example:
“Send 5 follow-up emails to warm leads.”

Offer

Name the offer connected to the action.

Examples:

- Capacity Playbook
- Coaching package
- Corporate workshop
- Speaking keynote
- Consulting intensive
- Podcast sponsorship
- Book bulk order
- Affiliate partnership

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Potential Value

Estimate the possible revenue attached to the action.

This helps the user stop giving equal energy to unequal opportunities.

Deadline

Set a date. Revenue activities without deadlines become wishes.

Status

Use simple status labels:

- Not started
- In progress
- Sent
- Followed up
- Waiting on decision
- Closed won
- Closed lost
- Pause

Sales Actions

This week, I will:

Action	Target
Follow ups	
Sales calls	
Proposals	
Outreach messages	
Partnership conversations	
Speaking pitches	
Corporate outreach	

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Capacity First™ Revenue Filter

The highest value revenue action with the lowest unnecessary drain is:

This is the most important prompt on the page.

It forces you to ask:

- What could create meaningful revenue this week?
- What does not require excessive emotional labor?
- What uses assets, relationships, or momentum I already have?
- Where is money already in motion?
- What is simple, direct, and aligned?

Examples:

- Following up with warm leads instead of creating a new funnel
- Selling the existing playbook instead of building another product
- Sending a proposal already requested instead of posting more content
- Reaching out to past clients instead of chasing cold strangers
- Pitching a known partner instead of starting from zero

The revenue activity I may be avoiding is:

This prompt is necessary because high achievers often disguise avoidance as productivity.

Examples:

- Making the offer
- Following up
- Naming the price
- Sending the invoice
- Asking for the sale
- Pitching the corporate buyer
- Reconnecting with past clients
- Publishing the sales page
- Inviting people to buy

The offer I should lead with this week is:

This keeps the week commercially focused.

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The offer should ideally be:

- Clear
- Easy to explain
- Easy to buy
- Aligned with the monthly revenue goal
- Connected to the audience's current need
- Sustainable to deliver
- Strong enough to create meaningful revenue

CEO Revenue Standard

I do not need to chase every opportunity.

I need to move the right money forward.

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Weekly Revenue Needle Movers Worksheet

Revenue Focus

This week’s revenue goal is: \$

Revenue Needle Movers

These are the revenue-producing actions that deserve attention this week.

Activity Offer	Potential Value	Deadline	Status
	\$	Not started / In progress / Sent / Followed up / Closed	
	\$	Not started / In progress / Sent / Followed up / Closed	
	\$	Not started / In progress / Sent / Followed up / Closed	

Sales Actions

This week, I will:

Action	Target
Follow ups	
Sales calls	
Proposals	
Outreach messages	
Partnership conversations	
Speaking pitches	
Corporate outreach	

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Capacity First™ Revenue Filter

The highest value revenue action with the lowest unnecessary drain is:

The revenue activity I may be avoiding is:

The offer I should lead with this week is:

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Weekly Pipeline Review

Pipeline Snapshot

Money does not move without discernment.

Use this section to see where opportunity already exists, what needs your attention, and which next steps can create revenue, momentum, or a decision this week.

Name or Organization	Opportunity	Value	Stage	Next Step	Follow Up Date
		\$	Lead / Call / Proposal / Negotiation / Closed		
		\$	Lead / Call / Proposal / Negotiation / Closed		
		\$	Lead / Call / Proposal / Negotiation / Closed		
		\$	Lead / Call / Proposal / Negotiation / Closed		

Pipeline Priority

The one opportunity that deserves the most attention this week is:

Because:

The next step I will take is:

By this date:

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Pipeline Questions

Where is money already in motion?

Who needs a follow up from me?

What proposal, invoice, or decision is waiting on me?

What conversation could create momentum this week?

Capacity First™ Pipeline Filter

Which opportunity has the highest revenue potential with the clearest next step?

Which opportunity is consuming energy without real movement?

What do I need to follow up on instead of overthinking?

What should I release, pause, or stop chasing?

CEO Pipeline Rule

No opportunity should sit without a next step. If there is no next step, make one of 3 decisions:

Follow-Up List

Decision	Meaning
Move it	Take the next action

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Decision	Meaning
Pause it	Revisit later with intention
Release it	Stop carrying it mentally

This week, I will follow up with:

Person or Organization	What They Need from Me	Date
1.		
2.		
3.		
4.		
5.		

CEO Closing Standard

I do not chase every possibility.

I move the right opportunities forward.

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Weekly Capacity Check

Capacity Before Performance™

Your capacity is not a side issue. It shapes your decisions, your revenue, your relationships, your creativity, and your ability to follow through.

Before you commit to the week you planned, tell the truth about the capacity you have.

Capacity Snapshot

Rate each area from 1 to 10.

Capacity Area	Score	What Is Affecting It?	What Do I Need This Week?
Physical capacity			
Mental capacity			
Emotional capacity			
Relational capacity			
Spiritual capacity			
Creative capacity			

Scoring Guide

Score	Meaning
8 to 10	Strong capacity
5 to 7	Strained capacity
3 to 4	At-risk capacity
1 to 2	Critical capacity deficit

This Week’s Capacity Reality

My current capacity is: High / Moderate / Low / Critical

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The capacity area that needs the most attention this week is:

The capacity area that feels strongest this week is:

What Is Consuming My Capacity?

Name the people, patterns, decisions, obligations, or pressures that are consuming capacity right now.

-
-
-

What Would Restore Capacity?

Name what would restore energy, clarity, peace, or steadiness this week.

-
-
-

Capacity-Based Adjustment

Because of my current capacity, this week I need to adjust:

Area	Adjustment Needed
My Big 3	
Revenue activities	
Meetings or calls	
Client or customer expectations	
Family or caregiving responsibilities	
Recovery time	

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The one thing I need to protect this week is:

Boundary of the Week

This week, I need to:

Action	Check	What This Looks Like
Say no		
Pause		
Delegate		
Renegotiate		
Ask for support		
Release		

My boundary statement this week is:

Capacity First™ Reminder

My capacity is not separate from my performance.

It is the source of my performance.

CEO Closing Question

What would change if I honored my real capacity before I forced my plan?

Priority Clients and Relationships

Relationship Focus

Success is not built through tasks alone. It is built through trust, follow-through, service, discernment, and aligned relationships.

This section helps you decide which people need your attention this week without giving everyone equal access to your energy. Some relationships create revenue. Some create momentum. Some require care. Some require boundaries. Your job is not to be endlessly available. Your job is to lead your relationships with clarity and capacity.

Use this section to identify the clients, leads, partners, team members, collaborators, or personal relationships that matter most this week.

Capacity First™ Principle:

Not every relationship requires the same level of access, attention, or emotional labor.

This Week’s Relationship Priorities

This week, the most important people or relationships to support are:

Person or Organization	Relationship Type	Why It Matters	Action Needed
	Client / Lead / Partner / Team / Personal		
	Client / Lead / Partner / Team / Personal		
	Client / Lead / Partner / Team / Personal		

How To Use This Table

Choose people or organizations based on strategic importance, not urgency alone.

Consider:

- Who is already in motion toward a decision, purchase, referral, collaboration, or opportunity?
- Who needs care, appreciation, clarity, or follow-through?
- Which relationship could create meaningful momentum if strengthened this week?
- Which relationship is consuming capacity without clear value, reciprocity, or alignment?

This week, the most important people or relationships to support are:

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Client Experience Check

A strong business is built on consistent relationship stewardship. This does not mean overdelivering, overexplaining, or being constantly available. It means paying attention to the right people at the right time.

Who needs appreciation?

Who should be thanked, acknowledged, celebrated, encouraged, or recognized?

Who needs discernment?

Where do I need to pause before giving more access, time, emotional labor, or unpaid support?

Who needs a next step?

Who needs a follow-up, decision, proposal, invoice, introduction, invitation, or clear answer?

Strategic Relationship Builder

Every week, choose one relationship to strengthen intentionally. This should be a relationship that aligns with your revenue, mission, leadership, visibility, support, or long-term growth.

The one relationship I should intentionally strengthen this week is:

I will do that by:

Relationship Builder Menu

If you are not sure what action to take, choose one:

Action	Best Used When
Send a thoughtful follow-up	A lead, client, or partner is waiting on momentum
Express appreciation	Someone has supported, referred, encouraged, or trusted you
Make an introduction	2 aligned people should know each other

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Action	Best Used When
Clarify expectations	There is confusion, drift, or unclear ownership
Ask for the next step	A relationship is warm but has not moved forward
Invite collaboration	There is mutual value and aligned capacity
Set a boundary	The relationship is draining more than it is returning
Reconnect	The relationship has value but has gone quiet

Energy Review

Relationships affect capacity. Some people leave you clearer, braver, and more resourced. Others leave you depleted, obligated, confused, or resentful.

This section is not about judging people. It is about telling the truth about what each relationship requires from you.

Who energizes me?

Who leaves me feeling expanded, clear, supported, inspired, peaceful, or strengthened?

Who drains me?

Who leaves me feeling anxious, resentful, overextended, unseen, pressured, or depleted?

What boundary or conversation is needed?

What needs to be clarified, paused, delegated, renegotiated, or released?

Capacity First™ Relationship Check

Before I give more time, access, or emotional energy this week, I will ask:

- Is this relationship aligned with my values, vision, business, or wellbeing?
- Is there mutual respect, reciprocity, or clear purpose here?
- Am I responding from wisdom or guilt?
- What does this relationship need from me this week?

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- What level of access can I offer without abandoning myself?

CEO Relationship Standard

This week, I will lead my relationships with:

Standard	My Commitment
-----------------	----------------------

Clarity

Care

Discernment

Follow-through

Boundaries

Closing Reflection

The relationship that deserves more attention this week is:

The relationship that needs a clearer boundary is:

The relationship that could create the most aligned momentum is:

Capacity First™ Reminder

I do not have to be equally available to everyone.

I can be caring, strategic, generous, and boundaried at the same time.

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Weekly Recovery Plan

Recovery Is a Business Strategy

This week, I will not treat recovery as the reward for exhaustion. I will treat it as part of the operating system.

Recovery is not what I earn after I have over given, overworked, overperformed, or overextended myself. Recovery is what allows me to lead, create, sell, serve, decide, and live with discernment.

This section helps me plan recovery before the week consumes my capacity. I am not waiting until I crash to restore myself. I am choosing recovery as a leadership decision.

Capacity First™ Principle:

Recovery is not separate from performance. Recovery protects the source of performance.

Why This Section Matters

A sustainable week is not built by filling every open space with more work. It is built by protecting the practices that keep me resourced enough to lead well.

If I do not schedule recovery, pressure will schedule overextension.

This section helps me identify the small, realistic recovery commitments that will support my body, mind, spirit, relationships, creativity, and business this week.

The goal is not perfection; it's protection.

How To Complete This Section

For each area, ask:

- What would support my capacity this week?
- What is realistic about the week I have?
- What would help me feel more steady, clear, nourished, connected, or restored?
- What needs to be scheduled now so it does not get sacrificed later?

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Recovery Commitments

Recovery Area	Commitment	Day or Time
Sleep		
Movement		
Nutrition		
Quiet time		
Joy		
Play		
Connection		
Spiritual practice		

My Non-Negotiable Recovery Anchor

This week, I will protect:

This is the one recovery practice I will treat as essential, not optional.

Choose something that is simple enough to keep, even if the week becomes full.

Examples:

- 7 hours of sleep at least 3 nights
- 20 minutes of quiet before starting work
- 1 unplugged evening
- A walk after lunch
- No work after a certain time
- A real meal before afternoon calls
- Sunday planning with no rushing
- Prayer or spiritual grounding before checking email

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Capacity First™ Reminder:

A non-negotiable is not a luxury. It is a protection point.

Resilience Reset™

When I feel overloaded, I will pause and ask:

- What am I carrying?
- What needs my attention?
- What can wait, be delegated, or be released?
- What would restore 5 percent of my capacity today?

Recovery Reflection

What would make this week feel sustainable?

How To Use the Resilience Reset™ pause

Use this when you feel scattered, pressured, resentful, emotionally full, physically tense, or tempted to push past your limits.

This is not a long process. It is a 90-second pause that helps you return to leadership instead of reacting from overload.

Step 1: Name what you are carrying.

What is taking up emotional, mental, physical, relational, or spiritual space?

Step 2: Identify what needs attention.

Not everything that feels urgent is truly important.

Step 3: Release or reduce what does not need to be carried now.

What can wait, be delegated, renegotiated, simplified, or removed?

Step 4: Restore 5 percent.

What small action would give you even a little capacity back today?

Examples:

- Drink water
- Step outside

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- Take 10 deep breaths
- Eat something nourishing
- Send the clarifying message
- Cancel or move 1 non-essential task
- Ask for help
- Close the laptop for 15 minutes
- Pray, journal, stretch, or sit quietly
- Stop trying to solve everything at once

Recovery Reflection

What would make this week feel sustainable?

What would make this week feel lighter?

What am I willing to stop carrying this week?

What support do I need to ask for this week?

Weekly Recovery Standard

This week, I will protect my recovery by:

Standard	My Commitment
-----------------	----------------------

I will stop

I will pause

I will delegate

I will simplify

I will protect

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Closing Reminder

I do not have to earn recovery by reaching exhaustion first. I can build recovery into the way I lead.

I can protect the capacity required to build what I am called to build.

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Friday CEO Reflection

This reflection is not about judging yourself, criticizing what did not get done, or measuring your worth by your productivity.

This is your weekly leadership review.

At the end of the week, the CEO does not only ask, “Did I finish everything?”

The CEO asks:

- What created revenue?
- What created momentum?
- What protected my capacity?
- What drained my capacity?
- What needs to change before next week begins?

This section helps you close the week with clarity instead of carrying unfinished mental, emotional, and business weight into the weekend.

Capacity First™ Principle:

Reflection turns experience into wisdom. Wisdom protects capacity.

Weekly CEO Summary

Complete these statements honestly. Do not overthink them. Look at what actually happened this week.

This week, I **created revenue** by:

Use this space to name the actions that directly or indirectly created income, sales momentum, buyer interest, or opportunity.

Examples:

Sales conversations

Follow-ups

Proposals sent

Invoices paid

Products sold

Speaking pitches

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Corporate outreach

Partnership conversations

Content that led to inquiries

Client renewals or referrals

This week, I **created momentum** by:

Momentum is not always money yet. Sometimes it is the strategic movement that makes future revenue, visibility, or clarity possible.

Examples:

Clarifying an offer

Booking a meeting

Finishing a page, outline, pitch, or proposal

Having a hard conversation

Making a decision

Publishing meaningful content

Improving a system

Following through on a commitment

Building a relationship

This week, I **protected capacity** by:

Name where you honored your energy, boundaries, recovery, body, focus, or peace.

Examples:

Saying no

Rescheduling something unnecessary

Taking a walk

Eating before calls

Ending work on time

Delegating

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Asking for help

Taking quiet time

Choosing not to overexplain

Protecting sleep

Reducing emotional labor

This week, I **drained capacity** by:

This is not for shame. This is for pattern recognition.

Look for where energy leaked without meaningful return.

Examples:

Overcommitting

Avoiding a decision

Taking on someone else's responsibility

Scrolling instead of resting

Saying yes from guilt

Working without breaks

Undercharging

Overdelivering

Chasing low-value tasks

Not asking for support

Ignoring your body's signals

Weekly Review

Question

Reflection

What worked?

What did not work?

What moved the needle?

What consumed energy without return?

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Question

Reflection

What should I stop?

What should I repeat next week?

How To Complete This Section

Be specific. “Marketing worked” is too vague. “Sending 3 direct follow-up messages created 2 sales conversations” is useful.

Look for evidence, not emotion.

Ask yourself:

- What produced revenue, leads, clarity, or momentum?
- What felt busy but did not matter?
- What did I carry that was not mine?
- What did I avoid that made the week heavier?
- What is the simplest adjustment that would make next week better?

Wins

My 3 wins this week were:

-
-
-

Wins count even when they are small.

A win may be:

Making the call

Protecting the boundary

Sending the proposal

Resting before you crashed

Choosing clarity over chaos

Finishing the page

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Having the conversation

Asking for support

Not abandoning yourself under pressure

CEO Reminder:

A win is not only what you completed. A win is also where you led yourself differently.

Lessons

This week taught me:

Use this space to capture the lesson before you rush into the next week.

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Prompts if needed:

This week showed me that:

I need to stop:

I need to trust:

I need more support with:

I am proud of myself for:

Next week will work better if:

CEO Closing Question

Did I lead this week in a way I can sustain? Yes / No / Not yet

If not yet, what needs to change next week?

Closing Statement

I am allowed to build success without abandoning myself.

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Weekly CEO Summary Worksheet

Complete these statements honestly. Do not overthink them. Look at what happened this week.

This week, I created revenue by:

This week, I created momentum by:

This week, I protected capacity by:

This week, I drained capacity by:

Weekly Review

Question

Reflection

What worked?

What did not work?

What moved the needle?

What consumed energy without return?

What should I stop?

What should I repeat next week?

Wins

My 3 wins this week were:

-
-
-

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I need to stop:

I need to trust:

I need more support with:

I am proud of myself for:

Next week will work better if:

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Did I lead this week in a way I can sustain? Yes / No / Not yet

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Part 7: Daily CEO Pages

Daily CEO Pages

Part 7 is not a standard productivity planner. Its strength is the shift from “tasks” to “leadership.”

The daily pages repeatedly reinforce your core philosophy: **capacity before performance, revenue before busyness, reflection before self-judgment.**

This is not a daily task list.

This is a daily leadership page.

Each day, I will lead my business, my capacity, and my life with intention.

Capacity First™ Principle

A successful day is not measured by how much I complete.

It is measured by whether I moved the right things forward without abandoning myself.

Daily CEO Standard

Today, I will focus on:

- The most important revenue activity
- The most important leadership decision
- The most important capacity protection choice

I do not have to chase the day.

I can lead the day.

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Daily CEO Template

Date: _____ Day: _____

Today's Leadership Intention

Today, I choose to lead with:

My Big Three

The 3 outcomes that matter most today are:

-
-
-

Today's Most Important Revenue Activity

The 1 action that can create revenue, sales momentum, or opportunity today is:

Today's CEO Decision

The decision I need to make or move forward today is:

Today's Capacity Check

My current capacity is: _____ High / Moderate / Low / Critical

What is affecting my capacity today?

What do I need to protect?

Today's Standard

I do not need to do everything today.

I need to do the right things with discernment and capacity.

Email Texts - DMs

Phone calls

Meetings

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Morning CEO Check In

Begin Before the Business Begins

Before I respond to the world, I will check in with myself.

Morning Capacity Check

Area	Score 1 to 10	What I Notice
Physical energy		
Mental discernment		
Emotional bandwidth		
Spiritual grounding		
Creative energy		

What Am I Carrying Today?

Today, I am carrying:

What Actually Needs My Attention?

The most important thing that needs my attention is:

What Can Wait?

These things do not need to control today:

-
-
-

Morning Reset

Today, I give myself permission to:

Capacity First™ Reminder

My first responsibility is not to react.
My first responsibility is to lead.

The Resilience Brilliance™ Capacity Playbook: A Practical Guide to Sustainable Performance
Powered by the Capacity First™ Method
For leaders, entrepreneurs, caregivers, and high achievers who are ready to build success without abandoning themselves.

Daily Revenue Focus

Revenue Before Busyness

Today’s revenue goal or revenue-supporting action is:

My Highest Value Action

The one activity most likely to create revenue, opportunity, or strategic momentum is:

Revenue Action Menu

Choose the actions that matter today:

Action	Target or Name	Status
Follow up		
Sales conversation		
Proposal		
Invoice		
Corporate outreach		
Speaking pitch		
Partnership message		
Content that sells		

Money in Motion

Where is money already in motion?

Who needs a next step from me?

What offer should I lead with today?

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CEO Revenue Filter

Is this activity connected to revenue, relationship, visibility, or long-term strategic value?

Yes / No / Not clear

If not clear, should I do it, delegate it, defer it, or delete it?

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Capacity Protection

Protect the Source

This page is not about doing more. It is about noticing what could drain you before the day takes over, then choosing what will help you stay steady, clear, and supported.

Capacity protection is a leadership practice. When you protect your capacity, you protect your ability to create, earn, serve, decide, lead, recover, and build what matters.

My capacity is the source of my performance, creativity, leadership, and revenue.

Capacity First™ Principle:

You cannot sustainably lead, sell, serve, or create from a depleted source.

How To Use This Section

Complete this page before the day becomes crowded.

Do not overthink your answers. Name what is true today. The goal is not perfection. The goal is awareness, protection, and one intentional adjustment that helps you lead the day instead of being consumed by it.

Use this page to ask:

- What could drain me today?
- What will help me stay steady?
- What boundary needs to be honored?
- What recovery anchor will support me before I am depleted?

Today's Capacity Drains

What could drain me today?

Name the people, decisions, obligations, emotions, tasks, environments, or expectations that may consume more energy than they return.

Examples may include overcommitting, unclear communication, too many calls, caregiving demands, conflict, decision fatigue, social media, rushing, under eating, lack of sleep, or carrying responsibilities that are not fully yours.

What could drain me today?

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Today's Capacity Protectors

What will help me stay steady today?

Name the choices, practices, boundaries, support, or rhythms that will help you preserve your energy and focus.

Examples may include quiet time, a real meal, movement, a walk, prayer, delegation, saying no, asking for help, limiting calls, batching work, closing a loop, or choosing the simplest next step.

What will help me stay steady today?

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Boundary of the Day

Today, I need to say no, pause, delegate, renegotiate, or release:

A boundary does not have to be dramatic to be powerful. Sometimes capacity is protected by one honest pause, one clearer expectation, one request for help, or one decision not to carry what is not yours.

Recovery Anchor

Today's recovery anchor is:

Recovery Type

My Commitment

Sleep

Movement

Nutrition

Quiet

Joy

Connection

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Resilience Reset™ method

When I feel overloaded today, I will pause and ask:

- What am I trying to carry that is not mine?
- What is the next right action?
- What can be simplified?
- What would restore even 5 percent of my capacity?

The goal of the Resilience Reset™ is not to fix the entire day in one moment. The goal is to interrupt depletion, return to clarity, and choose the next right action from capacity instead of pressure.

Capacity First™ Reminder

I am allowed to protect the energy required to build what I am called to build.

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Evening CEO Reflection

Close the Day with Discernment

This section is not for judging the day; it is for learning from it.

Use this reflection to notice what created revenue, what created momentum, what protected your capacity, and what quietly drained it. The goal is not to prove that you did enough. The goal is to close the day with clarity so tomorrow can be led with more wisdom.

A meaningful day is not measured by how much you carried. It is measured by whether you moved what mattered and stayed connected to yourself while doing it.

Today, I created momentum by:

Today, I created revenue or revenue potential by:

Today, I protected my capacity by:

Today, I drained my capacity by:

Daily Wins

My 3 wins today were:

-
-
-

What Moved the Needle?

The action that mattered most today was:

What Did Not Need My Energy?

Something I can release, reduce, or stop carrying is:

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What Needs to Move to Tomorrow?

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Evening Capacity Check

My capacity at the end of today is: High / Moderate / Low / Critical

What do I need tonight?

Closing Statement

I did not have to do everything to make today meaningful.

I only had to lead what mattered.

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Daily CEO Page Starter Set

How to Use the Daily CEO Pages

Use these pages as a daily leadership rhythm, not a perfection system.

The goal is not to track every task. The goal is to lead the day with clarity, protect your capacity before it is depleted, and focus on the actions that create revenue, momentum, and sustainable progress.

Complete the morning prompts before you respond to messages, meetings, or other people’s priorities. Complete the evening prompts as a short closeout ritual so you can capture what worked, release what does not need to follow you, and lead tomorrow with more wisdom.

Each morning, complete:

- Today’s Leadership Intention
- My Big Three
- Most Important Revenue Activity
- Capacity Check
- Boundary of the Day

Each evening, complete:

- What created momentum?
- What created revenue or opportunity?
- What protected capacity?
- What drained capacity?
- What should shift tomorrow?

Daily CEO Rhythm

Time of Day	Practice	Purpose
Morning	CEO Check In	Lead before reacting
Midday	Revenue Focus	Move the business forward
Afternoon	Capacity Protection	Prevent unnecessary depletion

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Time of Day	Practice	Purpose
Evening	CEO Reflection	Capture lessons and close the day

Weekly Use Recommendation

Use the Daily CEO Pages **five days per week as your core rhythm**, ideally Monday through Friday or whatever days you are focused on work or a project. Remember to take time off completely to rest and recharge your system.

For most users, this is the best balance: frequent enough to build a leadership habit, but not so rigid that the system becomes another source of pressure.

Recommended Weekly Flow

Day	Recommended Use	Focus
Monday	Full Daily CEO Page	Set direction, revenue focus, capacity protection
Tuesday	Full Daily CEO Page	Execute the highest-value actions
Wednesday	Full Daily CEO Page	Review capacity, adjust priorities, protect momentum
Thursday	Full Daily CEO Page	Follow up, sell, simplify, and close loops
Friday	Full Daily CEO Page plus Weekly Reflection	Capture revenue, momentum, lessons, and capacity drains
Saturday	Optional light check-in	Recovery, family, joy, personal capacity
Sunday	Optional reset only	Prepare gently for the week without overplanning

Best Practice

If you are in a high-demand season, use the full page daily.

If you are in a lower-capacity season, complete only these 3 prompts:

- What matters most today?
- What is my most important revenue or momentum action?
- What must I protect so I do not abandon myself today?

The win is not completing every line. The win is returning to leadership before the day takes over.

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Closing Summary

From Managing Time to Leading Capacity

You did not pick up this playbook because you needed another planner.

You picked it up because the old way of working is no longer enough.

Traditional project management asks, “What needs to get done?”
Traditional time management asks, “Where can I fit it in?”
But neither question goes deep enough.

Because you can have a full calendar and still feel unfocused.
You can complete tasks and still fail to create revenue.
You can hit deadlines and still abandon your health, peace, relationships, and purpose in the process.

I built The Resilience Brilliance™ Capacity Playbook to help you operate differently.

Powered by the Capacity First™ Method and aligned with the Capacity Before Performance™ approach, this playbook teaches you to stop measuring success only by output and start leading from the source of sustainable performance: your capacity.

The Old Mentality vs. The Capacity First™ Shift

The Old Mentality	The Capacity First™ Shift
Manage your time	Lead your capacity
Track every task	Focus on what moves the needle
Push through exhaustion	Recognize capacity limits before burnout
Measure productivity by volume	Measure progress by revenue, momentum, recovery, and alignment
Treat rest as a reward	Treat recovery as a performance strategy
React to the day	Lead the day with intention
Carry everything	Release, reduce, delegate, or stop what drains capacity
Perform until you crash	Build sustainable resilience before burnout occurs

This is not about doing less because you are less capable.

It is about becoming more discerning with your energy, more strategic with your focus, and more honest about what success requires from you.

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For leaders, entrepreneurs, caregivers, and high achievers who are ready to build success without abandoning themselves.

What Changes When You Use This Playbook

When you use this playbook consistently, you begin to see patterns that traditional planners miss.

You see what creates revenue.

You see what creates momentum.

You see what drains your physical, mental, emotional, relational, and spiritual capacity.

You see which commitments produce results and which ones only produce exhaustion.

You see where your goals are aligned with your real life and where they are asking you to abandon yourself.

Over time, this creates a different way of leading.

You make better decisions under pressure.

You recover more quickly from setbacks.

You recognize early signs of burnout before they become a crisis.

You build rhythms that protect your energy, focus, and emotional regulation.

You stop confusing busyness with progress.

You stop measuring your worth by how much you can carry.

As stated earlier, the issue is not a lack of motivation. The issue is **capacity**.

That is why this playbook does not simply help you organize your work.

It helps you strengthen the part of you that your work depends on.

The Outcome

By the end of this playbook, you will have more than completed pages.

You will have built a personal operating system for sustainable performance.

You will know how to:

- Set annual, quarterly, monthly, weekly, and daily priorities with precise discernment
- Identify the revenue activities that deserve your best energy
- Protect your capacity before it is depleted
- Recognize burnout risk earlier
- Create recovery rhythms that support performance
- Reflect on what is working, what is draining you, and what needs to change
- Lead your business, career, caregiving, relationships, and personal life with more discernment
- Build success without abandoning yourself

The Resilience Brilliance™ Capacity Playbook: A Practical Guide to Sustainable Performance

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For leaders, entrepreneurs, caregivers, and high achievers who are ready to build success without abandoning themselves.

This is the heart of Resilience Brilliance™ programs:

You cannot outperform exhaustion.

You cannot build sustainable success on depleted capacity.

And you do not have to keep proving your strength by surviving systems, schedules, and expectations that were never designed to sustain you.

You can lead differently.

You can build differently.

You can succeed differently.

Your Next Step

The Resilience Brilliance™ Capacity Playbook gives you the operating system.

Now choose the level of support that matches where you are and what you are building next.

Whether you are an individual trying to rebuild your energy and direction, or an HR leader trying to address burnout, disengagement, manager overwhelm, and performance sustainability across your organization, there is a next step designed for you.

For Individuals, Entrepreneurs, Caregivers, and High Achievers

You do not need another productivity hack.

You need a better way to lead your life, energy, decisions, goals, and recovery.

If this playbook helped you see that the old model of time management is not enough, your next step is to continue practicing the Capacity First™ approach with guidance and support.

Start With the Free Webinar

Attend the Free Resilience Brilliance™ Webinar

If you are ready to stop running on empty and start building success in a way you can sustain, join the free webinar.

You will learn how to recognize what is draining your capacity, why burnout is not a personal failure, and how to begin rebuilding resilience before exhaustion becomes your default way of operating.

Register for the free webinar:

<https://pages.resiliencebrilliance.co/webinar>

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Go Deeper With the 7-Day Resilience Reset

Resilience Reset

7-Day Program | \$995

If you need a focused reset, the 7-day Resilience Reset is your next move.

This is for you if you are overwhelmed, stretched thin, or ready to interrupt the cycle of pushing through and finally create space to recover, refocus, and rebuild.

In 7 days, you begin shifting from survival mode into a more intentional, capacity-led way of operating.

Join the 7-Day Resilience Reset:

<https://pages.resiliencebrilliance.co/resilience-reset>

Build Sustainable Resilience With the 6-Week Program

Mastering Resilience

6-Week Program | \$3000

If you are ready for deeper transformation, Mastering Resilience gives you the structure, support, and implementation runway to strengthen resilience over time.

This is for individuals, entrepreneurs, caregivers, and high achievers who want to improve emotional regulation, decision-making under pressure, recovery from setbacks, and sustainable performance without abandoning themselves.

Explore Mastering Resilience:

<https://pages.resiliencebrilliance.co/mastering-resilience>

Want Private Support?

If you want personalized guidance, strategy, or support from Jena, book a private session.

This is the best next step if you want help applying the playbook to your specific life, leadership, business, caregiving responsibilities, goals, or current season.

Schedule a private session with Jena:

<https://www.resiliencebrilliance.co/schedule-private-session-with-jena/>

For HR Professionals, Leaders, and Organizations

Burnout does not stay isolated inside the employee experience. It shows up in the business metrics executives already track, including productivity, turnover, absenteeism, engagement, manager effectiveness, leadership readiness, change adoption, and performance sustainability.

The issue is not a lack of motivation; it's a capacity issue.

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For leaders, entrepreneurs, caregivers, and high achievers who are ready to build success without abandoning themselves.

When employees, managers, and leaders operate in a constant state of exhaustion, performance suffers regardless of skill, training, or intention. That is why Resilience Brilliance™ brings a different approach: helping organizations address the capacity constraints that make sustainable performance possible.

Start With the Free Lunch and Learn for HR Professionals

Free Lunch and Learn for HR Leaders

If you are an HR professional, people leader, or executive responsible for engagement, retention, culture, leadership development, or employee experience, start here.

This session introduces a more practical way to think about burnout, resilience, and sustainable performance inside the workplace.

You will explore what may be draining capacity in your organization and why traditional wellness efforts often fail to change the lived experience of employees and managers.

Register for the HR Lunch and Learn:

<https://pages.resiliencebrilliance.co/lunch>

Bring Resilience Brilliance™ into Your Organization

Resilience Brilliance™ corporate solutions are designed to support business performance outcomes across four key areas:

Area	Outcomes Supported
Engagement	Better pressure management, employee connection, morale, and participation
Leadership Development	Stronger communication, emotional intelligence, and manager effectiveness
Employee Experience	Reduced burnout risk and improved workplace experience
Performance	Improved decision-making, adaptability, and sustainable productivity

Corporate solutions can include:

- Keynote presentations
- Workshops and trainings
- Leadership development sessions
- Executive briefings
- Learning library licensing
- Executive coaching

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- Enterprise resilience partnerships
- Impact reporting

Topics include:

- **The Burnout Problem Nobody Is Solving™**
- **You Can't Outperform Exhaustion™**
- **Capacity Before Performance™**
- **Resilience During Change and Uncertainty**
- **Building Resilient Leaders**
- **Reclaim Your Life™ at Work**

Each engagement can be customized to align with your organization's goals, audience, HR priorities, budget, and implementation timeline.

Book a Corporate Conversation with Jena

If burnout, disengagement, absenteeism, turnover, manager overwhelm, or change fatigue are affecting your organization, the **next step is a 30-minute conversation**.

During the call, you can explore:

- Where burnout, disengagement, or change fatigue may be draining capacity
- Which HR and executive KPIs matter most right now
- Current challenges around retention, productivity, manager effectiveness, and culture health
- The best-fit solution: keynote, workshop, leadership training, learning library, or enterprise partnership
- Budget, timeline, and implementation options

Book 30 minutes with Jena for your organization:

<https://www.resiliencebrilliance.co/book-30-minutes-with-jena-taylor>

Choose the Next Step That Protects Your Capacity

You cannot outperform exhaustion.

You cannot build sustainable success on depleted capacity.

And you do not have to keep using systems that only ask how much more you can do.

The Resilience Brilliance™ Capacity Playbook invites you to ask a better question:

What capacity must be protected, restored, and strengthened so performance can become sustainable again?

For individuals, that question can change your life.

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For leaders, entrepreneurs, caregivers, and high achievers who are ready to build success without abandoning themselves.

For organizations, that question can change your culture, your leadership, and your business performance.

Choose your next step:

If You...	Your Best Next Step
Are an individual, entrepreneur, caregiver, or high achiever	Register for the free webinar: https://pages.resiliencebrilliance.co/webinar
Are an HR professional or people leader	Register for the Lunch and Learn: https://pages.resiliencebrilliance.co/lunch
Are ready for a focused reset	Join the 7-Day Resilience Reset: https://pages.resiliencebrilliance.co/resilience-reset
Are ready for deeper transformation	Explore Mastering Resilience: https://pages.resiliencebrilliance.co/mastering-resilience
Want private support	Book with Jena: https://www.resiliencebrilliance.co/schedule-private-session-with-jena/
Want corporate support	Book 30 minutes with Jena: https://www.resiliencebrilliance.co/book-30-minutes-with-jena-taylor

In deep gratitude,

