
DESIGNING MOMENTUM

How Leaders Build Progress That Compounds

COMPANION WORKBOOK

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Clarity · Strategy · Performance

Introduction

Reading about momentum is not the same as designing it.

Designing Momentum is built around a specific framework, a model for how progress is built, scaled, and sustained over time. This workbook gives you the tools to apply it to your own organization.

The thirteen exercises here follow the same sequence as the book. Each one is designed to produce a specific output, not a general awareness. You will not finish an exercise knowing more about momentum in the abstract. You will finish it with something named, diagnosed, or committed to, something real that exists in your organization right now.

How to Use This Workbook

There is no single right way to work through it.

The exercises are designed to stand alone. Each one gives you enough context to work through it without referring back to the chapter. If a concept feels unfamiliar, the chapter it corresponds to is clearly labeled.

A few principles worth keeping in mind as you work:

- **Be specific.** The most common mistake in exercises like these is staying at the level of the general. Every step is asking you to name something particular. Resist the pull toward abstraction. The more specific your answer, the more useful the output.
- **Be honest.** Several of these exercises will surface things your organization has been avoiding. That is by design. The workbook is a safe place to name them before you have to act on them.
- **Work through one at a time.** Thirteen half-considered answers are worth far less than three honest ones. Work at the pace the work deserves.

A Note on the Commitment Lines

Each exercise ends with a commitment. This is not a formality.

The commitment is the point. It is where the exercise converts from diagnosis to action. A leader who completes the diagnostic steps but skips the commitment has done the easy part and avoided the important part.

Write the commitment down. Name the action. Name the date. Tell someone else if that helps you hold to it.

The goal is to change one thing at a time until effort begins to compound.

Chapter 1: Effort Is Not Momentum

Exercise: The Activity Audit

Purpose: *To distinguish between effort that resets and effort that compounds.*

Step 1: Map your attention

List the three initiatives or tasks currently consuming the most time and energy:

- 1.
 - 2.
 - 3.
-

Step 2: Apply the momentum test

For each item, ask one question: does completing this make the next cycle easier?

Mark each item as either Compounds or Resets.

Step 3: Identify the drain

Pick one item marked Resets. Describe specifically why it does not carry forward. What about its design causes it to reset to zero each cycle?

Step 4: Redesign one

What would need to change for that item to leave something behind? Describe the specific structural change, not a change in effort or attitude.

Commitment: Name the one change you will make before the next cycle begins.

Chapter 2: The Illusion of Progress

Exercise: The Progress Test

Purpose: *To distinguish between wins that compound and wins that expire.*

Step 1: Name a recent win

Identify one result your team is currently pointing to as evidence of progress. Be specific.

Step 2: Stress test it

Answer these three questions honestly:

Could this result have been produced by your standard process, or did it require exceptional effort that cannot be sustained?

Did this win create new pressure or problems somewhere else in the organization?

If you stopped focusing on this metric tomorrow, would the progress hold?

Step 3: Find the system win

If any answer above gave you pause, rewrite the goal so it includes what the rest of the system must also be true for this win to count.

Step 4: The harder question

What result on your current dashboard looks healthy but cannot explain itself?

Commitment: Name the one metric you will examine more honestly before your next leadership review.

Chapter 3: Designing Momentum

Exercise: The Flywheel Audit

Purpose: *To map how your work reinforces itself and find where the loop breaks.*

Step 1: Map the loop

Describe the sequence of work in your organization where success in one area is supposed to strengthen the next. Keep it to three or four stages. Use your own language, not borrowed frameworks.

Step 2: Find the broken link

Where does the sequence stop reinforcing itself? Be specific about the gap, not just where results stall, but which connection between stages was never actually designed.

Step 3: Design the fix

What is one structural change that would close that gap? Not more effort. Not better communication. A specific change to how the work is connected.

Commitment: Name the specific connection you will design before the next planning cycle begins.

Chapter 4: Inertia Is the First Constraint

Exercise: The Inertia Diagnostic

Purpose: *To determine whether an initiative is failing or simply in its early inertial phase.*

Step 1: Name the heavy lift

Identify one current initiative where effort is high and visible results are limited. Describe what is happening specifically, not generally.

Step 2: Diagnose the resistance

Is the friction getting worse with each cycle, or is it high but consistent? Friction that is worsening signals a real problem. Friction that is constant and stable signals inertia. Which is it?

Step 3: Define the turning point

Identify one specific signal that would tell you the system is beginning to carry itself. Not a result. A behavior change. Something observable that would confirm momentum is forming before it is fully visible in the numbers.

Step 4: Protect the consistency

What is the one thing that must not change while you wait for that signal? Name it explicitly so it does not get abandoned under pressure.

Commitment: Name the one thing you will protect from change while the system builds momentum, and tell someone on your team what it is and why it matters.

Chapter 5: Removing Friction Before Adding Force

Exercise: The Friction Audit

Purpose: *To name the friction that is quietly taxing momentum and design one specific fix.*

Step 1: Name the friction

Identify one recurring process, approval, or handoff that consistently feels heavier than it should. Do not describe it generally. Name the specific task, the specific stall point, and how often it occurs.

Step 2: Trace the cost

Estimate how much time and attention this friction consumes in a single month across everyone it affects. Include not just the time spent on the task but the time spent working around it.

Step 3: Design the removal

What is the one structural change that would eliminate or significantly reduce this friction? Not a workaround. Not a new tool layered on top. A subtraction. What could be removed, simplified, or clarified so the friction no longer exists?

Commitment: Name the change and the date by which you will make it.

Chapter 6: Stability Is a Growth Strategy

Exercise: The Stability Audit

Purpose: *To identify where the system is fragile before growth exposes it.*

Step 1: Find the breaking point

If your current volume doubled in the next ninety days, where would the system fail first? Be specific. Name the process, the role, or the decision that would break under that pressure.

Step 2: Distinguish stable from stagnant

For the area you identified, ask three questions without the binary:

1) Could someone new operate it without relying on a specific person's memory or judgment?

2) Does it produce consistent results without heroic effort?

3) Would it continue functioning if the key person were absent for a week?

Where the answer is no, that is fragility, not stability.

Step 3: Name the fix

What is the one thing that must be stabilized before you add speed? Not optimized. Not automated. Stabilized. Describe the specific change that would make that breaking point dependable rather than fragile.

Commitment: Name the stabilization action and protect the time to do it before the next growth push begins.

Chapter 7: Scaling Structure Before Speed

Exercise: The Structure Audit

Purpose: *To find where structure has not kept pace with growth and identify the fix before speed is added.*

Step 1: Find the strain point

Identify a recent moment when the team tried to move faster and the system resisted. Describe what broke or slowed specifically. Not a general observation, the exact point where things stopped moving cleanly.

Step 2: Diagnose the cause

Is the strain coming from unclear ownership, undocumented processes, or decisions that can only be made by one or two people? Name the specific structural gap, not the symptom it produced.

Step 3: Define the boundary

What is one explicit rule, decision right, or documented standard that would eliminate that gap? Describe it precisely enough that someone could act on it tomorrow without asking for clarification.

Commitment: Name the one structural change you will make before the next growth push begins.

Chapter 8: Stored Capacity as Strategic Energy

Exercise: The Capacity Audit

Purpose: *To find where the system is running without reserve and identify what needs to change before disruption arrives.*

Step 1: Find the fragility point

Where in your current operation is there zero slack? If volume increased by thirty percent tomorrow, or a key person was unavailable for two weeks, what would break first? Name it specifically.

Step 2: Diagnose the form

Is the fragility primarily about time, talent, or decision quality? Where are people so fully utilized that there is no room to absorb the unexpected, develop others, or think beyond the immediate problem?

Step 3: Create the reserve

Identify one commitment, meeting, or task that could be reduced or eliminated without compromising outcomes. What would need to be true for that space to be protected rather than immediately filled with something else?

Commitment: Name the specific reserve you will create and what you will stop doing to make room for it.

Chapter 9: Agility Without Dissipation

Exercise: The Pivot Test

Purpose: *To determine whether a proposed change redirects momentum or dissipates it.*

Step 1: Name the proposed change

Describe the change in direction your team is considering. Be specific about what would stop, what would start, and what would be left behind.

Step 2: Test the signal

What is driving this change? Is it a pattern emerging from your own customers and data over time, or a reaction to a single competitor move, a lost deal, or a difficult quarter? Be honest. The quality of the signal determines whether the change is adaptive or reactive.

Step 3: Identify what carries forward

What has already been built in structure, relationships, process, or understanding that this change can build on rather than abandon? Name it explicitly. If the answer is nothing, the change is a reset, not a pivot.

Commitment: Name the one thing from the current direction that must be preserved regardless of what else shifts, and write it down before the decision is made.

Chapter 10: Modeling Risk Before It Is Felt

Exercise: The Risk Audit

Purpose: *To surface deferred risks before they become urgent and design one specific response.*

Step 1: Name the deferred risk

What is one risk in your business that has been acknowledged but not acted on? Not a hypothetical. Something real that has come up in a conversation, appeared in a review, or sat quietly in the back of your mind. Name it specifically.

Step 2: Identify what makes it easy to defer

Why has this risk not been addressed? Is it because addressing it feels expensive, uncertain, or politically uncomfortable? Understanding the deferral mechanism is as important as understanding the risk itself.

Step 3: Design the response

What is one specific action that would reduce this risk's impact if it materialized? Not a monitoring plan. Not a flag to revisit later. A structural change, a relationship, a reserve, or a decision that would already be in place when the risk arrives.

Commitment: Name the action and the date by which it will be done while conditions still allow for deliberate choice.

Chapter 11: Reflection as Calibration

Exercise: The Reflection Audit

Purpose: *To examine a specific outcome honestly and turn that examination into a change the system will actually remember.*

Step 1: Name the gap

Identify one initiative or decision from the past year that produced a different outcome than expected. Describe both what you expected and what actually happened. Be specific without assigning blame to people or departments.

Step 2: Diagnose the drift

Was the gap caused by a flawed strategy, insufficient capacity to execute, or a feedback loop that was too slow to catch the problem early enough to correct it? Name the primary cause honestly. Not all three. The one that mattered most.

Step 3: Build the calibration

What is one specific change to how your team reviews progress that would catch this type of drift earlier next time? Not a general commitment to reflect more. A specific rhythm, question, or review format that would surface the signal before it becomes a problem.

Commitment: Name the change and the date it becomes part of your operating rhythm.

Chapter 12: What Leaders Must Protect

Exercise: The Protection Audit

Purpose: *To identify what is worth protecting in your current system and establish one clear boundary before it erodes.*

Step 1: Name what is working

Identify the two or three conditions in your organization that are currently producing the results that matter most. Not the results themselves. The conditions that make them possible. Focus, clarity, a specific process, a trusted relationship, a decision rhythm. Name them explicitly.

Step 2: Find the erosion

For each condition you named, ask honestly: is it as strong today as it was six months ago? Where has drift begun? Where have small exceptions accumulated? Where has something that once felt reliable started to feel slightly less so?

Step 3: Set the boundary

What is one specific thing you will stop allowing in order to protect what you identified in Step 1? Not a general commitment to say no more often. A specific request, behavior, or initiative that is quietly taxing the conditions that matter most.

Commitment: Name the boundary and the conversation you need to have to make it real.

Chapter 13: How Flywheels Die

Exercise: The Decay Audit

Purpose: *To surface the early signals of flywheel decay before they become visible in the results.*

Step 1: Name the small exception

Identify one standard, process, or commitment that has quietly shifted in the past six months. Not a dramatic failure. A small accommodation that felt reasonable at the time. Name it specifically.

Step 2: Trace the pattern

Is this exception isolated or part of a pattern? Have similar accommodations been made in other areas? What does the accumulation of these small shifts tell you about where the system is drifting?

Step 3: Define the leading indicator

If your flywheel were to slow meaningfully over the next twelve months, what would be the first signal? Not a lagging result like revenue or retention. An early behavioral signal, a decision that starts taking longer, a problem that starts recurring, a conversation that stops happening.

Commitment: Name the one maintenance action you will take now, while conditions are still stable enough to allow deliberate choice rather than urgent response.

Momentum is a choice made repeatedly.

It begins with an honest question.

What would it actually take for our effort to start compounding?



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