

FREE 7-DAY STARTER KIT — NO EMAIL, NO CATCH

THE MOMENTUM PLANNER

Stop planning your week in your head. Put it on paper — for free, for 7 days — and feel the difference by Sunday night.

Most people don't fail because they're lazy. They fail because their to-do list doesn't know what they're actually trying to build. This one does. Every page ties back to one vision, so you stop doing busy-work and start doing the work that moves the needle.

5 EASY STEPS — START TODAY

- 1 **Print pages 2–16.** That's it — 1 overview page + 7 days, each with a focus page and a schedule page. (Pages 17–18 aren't for printing — just a peek at the full version.)
- 2 **Get a pen.** Any pen. This works on paper, not in your head.
- 3 **Start Monday.** Before you check your phone, write your Top 3 — the things that must happen no matter what.
- 4 **Do it again tomorrow.** And the next day. Same time, same pages, 7 days straight.
- 5 **Sunday, flip to the last page.** If it worked, that's where the full year lives.

EVERY TASK FITS ONE OF 5 PILLARS — HOW TO USE THEM

Look at your Must-Get-Done and Other-Tasks lines each day. Under whichever box below that task actually serves, jot one line. By Sunday, glance across the week and see where your time really went — not where you meant it to go.



Build

Creating the thing — products, systems, content, offers.



Grow

Getting it in front of more people — marketing, sales, outreach.



Serve

Taking care of who's already in — clients, customers, team.



Audit

Checking the numbers — money, metrics, what's actually working.



Sharpen

Investing in yourself — skills, health, rest, mindset.

"A moment is not the same as momentum."

— R.C. Grant

WEEK OF

PERIOD / WEEK #

THIS WEEK'S INTENTION — BY SUNDAY NIGHT, I WILL...

- WHAT MUST GET DONE THIS WEEK
- 1

2

3

WHO DO I WANT TO BE, THIS WEEK

BUILD · GROW · SERVE · AUDIT · SHARPEN — WHERE IS THIS WEEK'S WORK GOING?

Build

Creating the thing — products, systems, content, offers.

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WORK IN PROGRESS — WHAT'S STILL OPEN FROM LAST WEEK

"Do you hate losing so much that you're willing to change, or do you hate change so much that you're willing to lose?"

— Anon

DATE

DAY # / PERIOD #

WHAT MUST GET DONE

1

2

3

WHO DO I WANT TO BE, TODAY

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WORK IN PROGRESS — WHAT'S STILL OPEN

5:30AM – 9:30PM · BUILD HOURS → LEAD HOURS

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“Discipline is choosing between what you want now and what you want most.”
— Abraham Lincoln

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“Amateurs sit and wait for inspiration, the rest of us just get up and go to work.”
— Stephen King

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“You do not rise to the level of your goals. You fall to the level of your systems.”
— James Clear

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“Productivity isn’t about getting more things done — it’s about getting the right things done.”
— Chris Bailey

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“Energy and persistence conquer all things.”
— Benjamin Franklin

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“Consistency is what transforms average into excellence.”
— Anon

DATE _____ DAY # / PERIOD # _____

WHAT MUST GET DONE _____

1 _____

2 _____

3 _____

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A PEEK AT THE FULL VERSION

This 7-day kit is one slice. Here's the whole system.

Real screens from the full, typeable Momentum Planner — the same one you just tried on paper, but running the whole year: Vision → Quarter → Period → Day.

● ● ● ANNUAL VISION

Annual Vision Check-In

Kestrel Digital — Day 1, August 25, 2026

HOW THE WHOLE PLANNER FITS TOGETHER

01 Vision

What the business & I look like at year-end.

02 Quarter / Period

The revenue opportunity + big rocks that move the vision forward.

03 Projects (WIP)

The specific builds/campaigns that deliver the period.

04 Daily action

What Must Get Done + Who I Want To Be — today, on purpose.

VISION STATEMENTS

Write each line as if it's already happened — present tense, specific, end of year.

01 Kestrel Digital runs on systems, not on me — the team ships without me in every thread.

02 We cross \$2M ARR with 40% margins, serving 30 retained clients who refer us without being asked.

03 I train for 5 hours a week, sleep 7+ hours a night, and I'm present with my family every evening by 6.

+ Add vision line

PERIOD-BY-PERIOD CHECK-IN

Every 28 days, go line by line against the vision above and be honest about where it stands.

YOUR VISION, FOR REFERENCE

Kestrel Digital runs on systems, not on me — the team ships without me in every thread.

We cross \$2M ARR with 40% margins, serving 30 retained clients who refer us without being asked.

I train for 5 hours a week, sleep 7+ hours a night, and I'm present with my family every evening by 6.

Period 1

On track / adjust because...

Period 2

On track / adjust because...

Period 3

On track / adjust because...

Period 4

On track / adjust because...

Period 5

On track / adjust because...

Period 6

On track / adjust because...

Period 7

On track / adjust because...

● ● ● QUARTER / HALF / YEAR

Q1 Q2 Q3 Q4 H1 H2 FY

Quarter 1 · Periods 1–3

FOCUS FOR THIS STRETCH

Rebuild the offer, land 5 anchor clients, and get delivery off my plate.

BIG ROCKS (MAX 3)

1 Ship the new retainer offer

2 Hire + onboard a delivery lead

3 Land 5 anchor clients at the new price

REVENUE OPPORTUNITIES

OPPORTUNITY	VALUE	TIMELINE	RISK
Anchor client — Meridian Co	180,000	Q1	— ▾ ×
Anchor client — Northbay	96,000	Q1	— ▾ ×
Referral pipeline — 3 warm intros	140,000	Q2	— ▾ ×

+ Add opportunity

NOTES

Anything else worth capturing at this altitude...

● ● ● PERIOD PLAN

P3 P4 P5 P6 P7 P8 P9 P10 P11 P12 P13

1

Aug 25 — Sep 21 Days 1–28

BIG THING

e new retainer offer and get the first anchor client signed.

OCUS

delivery lead hire

ST GET DONE

ize retainer pricing + scope

view 3 delivery lead candidates

1 anchor proposal to Meridian Co

I WANT TO BE, THIS PERIOD

e — I make the call instead of researching it to death.

— hard news travels fast, not slow.

— I post the build in public, not just the results.

CHECK-IN

Rolls up to Q1. Rebuild the offer, land 5 anchor clients, and get delivery off m.

Big rocks: Ship the new retainer offer. Hire + onboard a delivery lead. Land 5 clients at the new price.

PERIOD REVENUE OPPORTUNITIES

OPPORTUNITY	VALUE	TIMELINE	RISK
+ Add opportunity			

WORK IN PROGRESS / PROJECTS

1 New retainer one-pager

2 Delivery SOP v1

3 Meridian proposal

+ Add line

BUILD · GROW · SERVE · AUDIT · SHARPEN

BUILD

Build the business

New retainer offer doc, onboarding SOP, pricing calculator.

GROW

Get warm intro calls, LinkedIn post series on the rebuild.

3 warm-intro calls, LinkedIn post series on the rebuild.

SERVE

Deliver on a promise

Weekly check-ins with the 4 legacy retainer clients.

AUDIT

Rebuild / cost-cut

Review Q4 margins by client — cut anything under 25%.

SHARPEN

Sharpen client language

2.5 wfs COO hit

GOAL TRACKING

Annual revenue

ARR (\$) — target 2,000,000

Retained clients

active retainers — target 30

Team ships without me

threads I'm not CCO'd on — target 80%

Training consistency

sessions / week — target 5

● ● ● DAILY PAGE

08/25/2026 To

"Do you hate losing so much that you're willing to change, or do you hate change so much that you're willing to lose?" — Alcon

Tuesday, August 25

Day 1 Week 1 Period 3 · Wk 1

WHAT MUST GET DONE

1 Finish Meridian proposal + send

2 Post build-in-public update #4

3 Interview delivery lead candidate #2

WHO DO I WANT TO BE, TODAY

Decisive — pick the pricing and move.

Direct — say the hard thing early.

Visible — share the messy middle, not just wins.

GOALS & MEASURABLES

Annual revenue

ARR (\$) — target 2,000,000

612,000

Retained clients

active retainers — target 30

22

Team ships without me

threads I'm not CCO'd on — target 80%

64%

Training consistency

sessions / week — target 5

4

BUILD · GROW · SERVE · AUDIT · SHARPEN

BUILD

Build the business

Retainer pricing calculator — v2

GROW

Get warm intro calls

LinkedIn post on the rebuild

SERVE

Deliver on a promise

Check in with Northbay on renewal

AUDIT

Rebuild / cost-cut

Review November invoices for scope creep

SHARPEN

Sharpen client language

30 min with COO on the JD

SCHEDULE (5:30a–9p, build hours → lead hours)

BUILD HOURS — MAKER TIME

5:30a

6:00a

6:30a

7:00a

7:30a

8:00a

Run

Deep work — proposal

OTHER TASKS

1 Book flights for the March offsite

2 Book the second half of Q4 files

Sample data shown for illustration — your planner starts blank, built around your own vision.

READY WHEN YOU ARE

You just ran one week. Here's the other 51.

The paper version you're holding is intentional — but it has limits. No autosave. No live goal tracking. No way to carry changes forward without reprinting. The full Momentum Planner solves that.

Same system. Web-based, typeable, autosaving — running all 13 periods, 52 weeks, and 365 days in a single place. Plus a clean print edition when you want it on paper, by choice.

Right now, before it goes live, founding access is open to the people already running this system.

1–10 Free, forever.

The first 10 to email in get lifetime access.

11+ \$36 CAD/year

Everyone after that locks in at the founding rate.

Email: contact@stonemindceo.com

Subject line: "Momentum" — first 10 in are free. The rest lock in the founding rate before it closes.

 [youtube.com/@StoneMindCEO](https://www.youtube.com/@StoneMindCEO)

 Spotify: search "StoneMindCEO"

 stonemindceo.com ·  contact@stonemindceo.com

