

PREPARED FOR

Alex Morgan

VP of Operations · Northwind Logistics

# The Leadership Portfolio.

*Six months. Six installations.  
One leader, made visible.*

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COHORT

COHORT 1 · SPRING 2026

DURATION

SIX MONTHS

FACILITATOR

MULTIPLY COACHING

ISSUED

MAY 2026

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FROM YOUR COACH

# For Alex Morgan —

What you are holding is not a workbook. It is a record of the leader you decided to become these last six months — and the leader you are still becoming.

Six months ago you walked into this work with real strengths and real costs. You were carrying things that no one had named out loud. The Multiply Executive Performance System is not designed to fix you. It is designed to surface what is already there, and to install the operating system that lets the best of you reach the people you've been entrusted to lead.

This portfolio is the proof. Every page that follows is something you built. None of it was given to you. All of it was wrought.

I am for you, Alex Morgan. I am for the highest possible good of the people you lead. That's why this stays demanding, and why it stays warm.

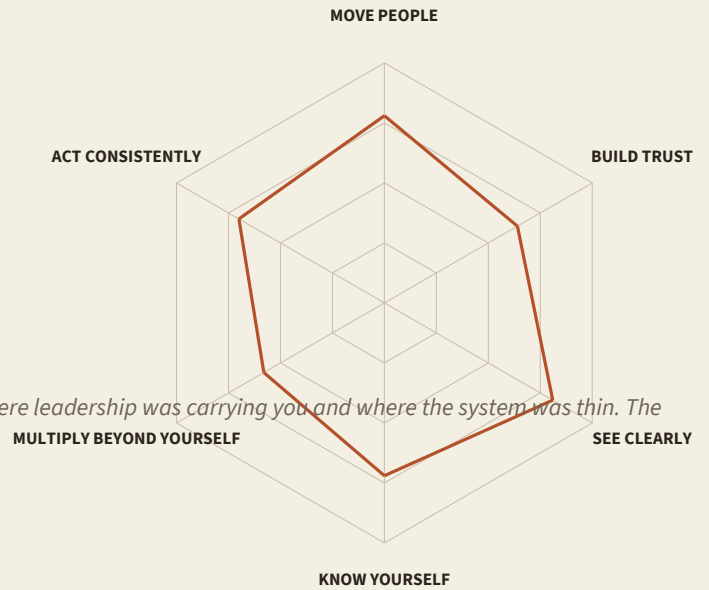
— MULTIPLY COACHING

# Where the work began.

This is the diagnostic snapshot you walked into the cohort with — a six-domain read of how you were leading on day one. It is not a verdict; it is a starting line. The work documented in the pages that follow is the answer.

DOMAIN	SCORE	BAND
Self-Awareness	72	EMERGING
Vision & Clarity	81	INSTALLED
Trust & Relational Intelligence	64	EMERGING
Communication & Influence	78	EMERGING
Execution Engine	70	EMERGING
Multiplication	58	INCONSISTENT

*Read the radar like a fingerprint, not a grade. The shape tells you where leadership was carrying you and where the system was thin. The pages that follow show what you did about it.*



WHAT'S INSIDE

# Six installations.

Each section follows the same arc: the pull that justifies the work, the pain that demands it, what was installed, and the deliverable you produced.

<b>I</b>	<b>Self-Awareness</b>	PERSONAL LEADERSHIP OS SNAPSHOT
<b>II</b>	<b>Vision &amp; Clarity</b>	PERSONAL VISION & 90-DAY PLAN
<b>III</b>	<b>Trust &amp; Relational Intelligence</b>	TRUST COMPOUND SELF-AUDIT + REPAIR CONVERSATION PLAN
<b>IV</b>	<b>Communication &amp; Influence</b>	6 CIRCLES OF INFLUENCE INVENTORY + SIGNATURE COMMUNICATION CASE
<b>V</b>	<b>Execution Engine</b>	WEEKLY RHYTHM + 30-DAY SPRINT PLAN
<b>VI</b>	<b>Multiplication</b>	PERSONAL BOARD OF ADVISORS BLUEPRINT + MULTIPLICATION PLAN

## INSTALLATION I

# Self-Awareness

## KNOW YOURSELF

*"You can't optimize a system you don't understand."*

— WHY THIS INSTALLATION MATTERS

BENCHMARK · 72/100 · EMERGING

## The pain this addresses

You react when you mean to respond. You lead from patterns you didn't consciously choose. Blind spots are costing you — and the nature of blind spots is that you can't see them.

## What was installed

Audit how you actually show up — not how you think you do. This installation establishes the self-knowledge every other upgrade depends on.

TOOLS · 5 VOICES PROFILE · 30-DAY PEACE INDEX · KYLY TENDENCY LOG

## DELIVERABLE

## Personal Leadership OS Snapshot

*A written profile of how you lead at your best and worst — and what conditions trigger each.*

## MY 5 VOICES ORDER

Pioneer (lead) · Connector · Guardian · Creative · Nurturer (trail).

Default under stress: Pioneer over-runs Guardian's wise pause.

## I LEAD AT MY BEST WHEN... (SUMMARY AND SYNTHESIS IN YOUR OWN WORDS)

I lead at my best when the team is clear on the destination, my calendar has at least two protected blocks for deep work, and I've slept 7+ hours. In that state I am direct, kind, and decisive.

## I LEAD AT MY WORST WHEN... (SUMMARY AND SYNTHESIS IN YOUR OWN WORDS)

I lead at my worst when I haven't named my own anxiety, when the calendar owns me, and when I confuse motion with progress. I get clipped, I shortcut my listening, and I make decisions for speed instead of for the people in the room.

## TOP THREE TRIGGERS I NOW NAME

1) Being interrupted in deep work. 2) A peer dismissing a Nurturer concern as 'soft.' 3) Late-day meetings stacked back-to-back without margin.

## ONE COMMITMENT I AM INSTALLING THIS MONTH

Two non-negotiable deep-work blocks per week, phone in another room, calendar held by my EA — no exceptions.

## ATTACHED ARTIFACTS

- [Peace-Index-30day.csv](#)

8 KB

## INSTALLATION II

# Vision & Clarity

## SEE CLEARLY

*"A high performer without a clear destination is just moving fast in the wrong direction."*

– WHY THIS INSTALLATION MATTERS

BENCHMARK · 81/100 · INSTALLED

## The pain this addresses

You're busy but unfocused. Every opportunity feels urgent. You have momentum — but no compass.

## What was installed

Build a personal vision architecture — a compelling picture of where you're headed across every area of life, not just work.

TOOLS · PURPOSE STATEMENT · VISION ARCHITECTURE · 90-DAY SPRINT

## DELIVERABLE

## Personal Vision & 90-Day Plan

*A purpose statement and a cascading vision from 10 years to the next 90 days.*

## PURPOSE STATEMENT

*One or two sentences. Why you exist as a leader — the through-line beneath every role you hold.*

I exist to build operations systems that release leaders to do their highest work — at home, on my team, and in the wider supply-chain industry.

## THREE CORE VALUES THAT GOVERN HOW YOU LEAD

*Name them and define what each looks like in practice.*

Truth-telling: name what's true even when it costs me politically.

Generosity: assume the best, give credit publicly, take heat privately.

Margin: refuse the lie that more hours equals more leadership.

## 10-YEAR PICTURE

*If everything went right, what does your life and leadership look like a decade from now? Paint it vividly — role, impact, relationships, rhythm.*

President of a regional logistics carrier known industry-wide for the way it develops operations leaders. Two of my mentees in C-suite roles. Marriage stronger than it is today. Coaching one cohort of next-up leaders annually.

## 3-YEAR PICTURE

*What is true 36 months from now? Concrete markers — scope, team, revenue, reputation, health, family.*

COO at Northwind. New ops leadership academy in its second cohort. Board seat at a logistics non-profit. Family Sabbath rhythm intact 48 of 52 weeks.

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**1-YEAR PLAN**

*The 3–5 most important goals for the next 12 months. Specific and measurable.*

Lead the Atlanta hub redesign to completion (revenue +18%). Hire and onboard a successor for the dispatch playbook. Publish the Northwind Operations Narrative org-wide.

**90-DAY PRIORITIES (ROCKS)**

*The 3 things that must get done in the next quarter to keep the 1-year plan on track.*

Rock 1: Atlanta hub plan approved by board. Rock 2: Successor named and shadowing. Rock 3: Narrative drafted and tested with three skip-level leaders.

**ISSUES / OBSTACLES TO SOLVE**

*What is in the way of the 1-year plan? Name the real ones — people, systems, fear, calendar, unclear decisions.*

Board chair wants quarterly reviews monthly — need to hold the line. Two senior peers are skeptical of the narrative effort. My own tendency to add scope mid-sprint.

INSTALLATION III

# Trust & Relational Intelligence

BUILD TRUST

*"Polite teams are usually dishonest ones. High-performing teams have learned to tell the truth."*

– WHY THIS INSTALLATION MATTERS

BENCHMARK · 64/100 · EMERGING

### The pain this addresses

Relationships feel surface-level. Tension exists but never resolves. You're not sure who will tell you what you actually need to hear.

### What was installed

Run the Trust Compound, name your truth-tellers, surface where Voice dynamics predictably break trust, and script the one hard conversation this season requires.

TOOLS · TRUST COMPOUND (CHARACTER / CHEMISTRY / COMPETENCE / CREDIBILITY) · RELATIONAL INTELLIGENCE MATRIX (AWARENESS → BEHAVIOR → D

DELIVERABLE

## Trust Compound Self-Audit + Repair Conversation Plan

*A self-rating across the four trust currencies, your named truth-teller bench, the Voice pairing where you predictably break trust, and a scripted hard conversation you commit to having this cohort.*

### TRUST COMPOUND – SELF-RATE THE FOUR CURRENCIES

Score yourself 1–10 on each currency, then name the evidence and the next move. Nature start point: which currency do you naturally extend first?

CURRENCY	SCORE 1	EVIDENCE BEHIND THE SCORE	NEXT MOVE TO GROW THIS CURRENCY
Character	8	I do what I say I'll do. Team can predict me. Reputation for keeping confidences across departments.	Audit one quarter for any commitment I quietly dropped — name it to the person before they name it to me.
Chemistry	6	Warm with my team; cooler with cross-functional peers. Default to task, not to person.	One unstructured coffee per week with a peer outside my function — no agenda, no ask.
Competence	9	Operational mastery is the currency I lead with. Peers route hard ops calls to me.	Stop over-extending it. Refer to others' competence publicly — multiply trust by sharing the spotlight.
Credibility	7	Track record on operational bets is strong. Less proven on the people / culture bets I'm starting to make.	Name one cultural bet publicly with a leading indicator. Be visibly accountable to it.

MY NATURE START POINT

*Which currency do you lead with by default — and which one do you under-invest in? What does that cost you?*

I lead with Competence. People trust what I can deliver before they trust who I am. The cost: peers see me as reliable but not always knowable. Under-investing in Chemistry has quietly capped the depth of my cross-functional influence.

RELATIONAL INTELLIGENCE MATRIX – WHERE I AM TODAY

*Awareness → Behavior → Dynamics → Performance. Where am I strong, where do I stall, and what is the next stage I need to install?*

Awareness: strong — I can name the dynamics in most rooms within ten minutes. Behavior: strong on my team, inconsistent with peers. Dynamics: this is my growth edge — I see them but don't always intervene. Performance: my team performs; the cross-functional system underperforms because I haven't installed the dynamic-level moves yet.

TRUTH-TELLER INVENTORY

*Name 3–5 people who will tell you what you actually need to hear. Note how often you meet, the trust currency they bring, and any seat that is missing.*

NAME	CONTEXT / HOW WE'RE CON	TRUST CURRENCY THEY BRI	CURRENT CADENCE	NEXT STEP TO DEEPEN
Marcus W.	Former CEO, mentor of 8 years	Character + Credibility	Monthly	Bring the Tony conversation to him before I have it — pressure-test the script.
Priya K.	Peer COO at a sister carrier	Competence + Chemistry	Quarterly	Move from quarterly to every six weeks — the cadence is too thin for the depth we've built.
Sam B.	My executive coach	Character	Bi-weekly	Already the highest-trust seat. Hold it. Give him standing permission to interrupt me.
Sarah	Spouse — reads me as a person, not a title	Character	Daily	Reinstate Friday-night planning — the standing truth-telling conversation.
Jordan L.	High-potential on my team — asks what others won't	Chemistry + Competence	Weekly 1:1	Formally invite him to flag any decision he thinks I'm rationalizing — written permission, not just implicit.

IF I CAN'T NAME 3–5 TRUTH-TELLERS – WHY NOT?

*What is the missing seat (elder, peer, younger, outside-vocation, truth-teller)? Who is the one person you will recruit to the bench before the next workshop?*

The missing seat is an outside-vocation voice — someone whose world isn't logistics or executive coaching. My thinking has narrowed because every truth-teller speaks my dialect. Recruiting Dr. Elena R. (pediatrician, family friend) before next workshop — she reads patterns I can't see because she isn't inside my industry's assumptions.

VOICE DYNAMICS – WHERE I PREDICTABLY BREAK TRUST

*Name the Voice pairing (yours + theirs) where trust breaks first. What does each voice need to give and receive trust well?*

MY VOICE	THEIR VOICE	HOW TRUST PREDICTABLY B	HOW I WILL GIVE TRUST W	WHAT I NEED TO RECEIVE
Pioneer	Nurturer	I move on velocity; they need processing time. They feel run over; I read their pause as resistance and push harder. Trust breaks because they stop bringing their real concern.	Build the pause into the meeting. Ask 'what would you want me to know that you haven't said yet?' before I close the loop.	I need them to name their concern without softening it. I'll ask for the unvarnished version explicitly.
Pioneer	Guardian	I see risk as friction to push through; they see it as wisdom to honor. I dismiss the 'what could go wrong' too quickly. They stop raising it.	Treat their risk surfacing as a feature, not a brake. Write the risks on the whiteboard before deciding.	I need a structured 'what could go wrong' segment in major decisions — not a tacked-on caveat.

ADDRESSING THE PAST – HAS RELATIONAL TRUST BEEN BROKEN?

Where is there an unrepaired relationship? Apply the GiANT framework: own your part, name the impact, ask the question, agree the next step.

Tony, peer in Finance. Two quarters ago I pushed a budget reallocation past him in a meeting where he wasn't prepared. I told myself it was urgency; it was avoidance. I haven't named it. Applying GiANT: own my part (I went around him), name the impact (he's been transactional with me ever since), ask the question (what would rebuild trust here?), agree the next step (we co-author the next reallocation, full stop). Scheduled for Thursday.

THE ONE HARD CONVERSATION I WILL HAVE THIS COHORT

Script it. Who, what, when, where. Opening line, the truth you are bringing, the outcome you are asking for. This will be confirmed as 'happened' at the next workshop.

Who: Tony, peer in Finance.

What: Repair the budget reallocation breach and reset the working relationship.

When: Thursday, 3pm. Where: His office (his turf, on purpose).

Opening line: 'I want to name something I should have named two quarters ago. When I pushed the Q3 reallocation through without looping you in properly, I was avoiding a hard conversation. That cost us trust, and I own it.'

Truth I'm bringing: I went around him because I didn't want the friction. The cost has been higher than the friction would have been.

Outcome I'm asking for: We co-design the Q3-2026 reallocation together, start to finish, and agree on how we'll handle the next disagreement before it shows up.

INSTALLATION IV

# Communication & Influence

MOVE PEOPLE

*"Your leadership is only as effective as your ability to move people."*

– WHY THIS INSTALLATION MATTERS

BENCHMARK · 78/100 · EMERGING

## The pain this addresses

Your message isn't landing. There's misalignment on your team but you can't pinpoint where it's breaking down.

## What was installed

Install a communication framework that works across every context — boardroom, team meeting, difficult conversation, public platform.

TOOLS · 6 CIRCLES OF INFLUENCE INVENTORY · 5 VOICES COMMUNICATION CODE · S4 STORY FRAMEWORK

DELIVERABLE

## 6 Circles of Influence Inventory + Signature Communication Case

*A named, scored inventory of every relationship you've been entrusted to steward — Self, Family, Friends, Team, Organization, Community — with a next right step for each, plus a real communication challenge solved with the S4 framework.*

CIRCLE 1 – SELF

*How are you leading yourself right now? Name the inner voices, habits, and rhythms shaping how you show up. Intentional or accidental?*

Inner voice has shifted from 'don't drop the ball' to 'be the leader they came here to follow.' Morning rhythm now anchors the day instead of email triage.

CIRCLE 2 – FAMILY

*Inventory every person in your immediate family / inner home circle. Score the current health of the relationship 1–10. Name the next right step.*

NAME	RELATIONSHIP	HEALTH	WHY THIS SCORE	NEXT RIGHT STEP
Sarah	Spouse	8	Flourishing — mutual trust & honesty	Reinstate weekly Friday-night planning conversation; protect it like a board meeting.
Ben	Son (14)	6	Fine — steady but not deepening	Monthly one-on-one breakfast — his choice of restaurant, no agenda.

NAME	RELATIONSHIP	HEALTH	WHY THIS SCORE	NEXT RIGHT STEP
Ava	Daughter (11)	7	Flourishing — consistent presence & rhythm	Coach her travel team's spring season — already on calendar.
Mom	Mother	5	Fine — reliable cadence, missing real conversation	Sunday phone call moved from drive-time to a real chair.
James	Brother	4	Floundering — drift / lack of intentionality	Visit Q3 — book the flight before it gets crowded out.

CIRCLE 3 – FRIENDS

The friendships you've been entrusted to steward — chosen family, mentors, lifelong friends, the few who know you. Name them.

NAME	HOW CONNECTED	HEALTH	WHY THIS SCORE	NEXT RIGHT STEP
David	Lifelong (since college)	9	Flourishing — mutual trust & honesty	Quarterly call already locked in — keep.
Mike & Tara	Couple friends	7	Fine — good season, but coasting	Host dinner in May.
Coach Sam	Mentor	10	Flourishing — generous encouragement & affirmation	Bi-weekly cadence is the right one. Hold it.

CIRCLE 4 – TEAM

Every direct report and key peer. Score the trust 1–10. One intentional move you owe each of them this quarter.

NAME	ROLE / FUNCTION	TRUST 1	WHY THIS SCORE	NEXT RIGHT STEP
Priya	Director, Dispatch	8	Flourishing — healthy conflict, resolved well	Hand her the playbook ownership formally — written transfer memo by month-end.
Jordan	Senior IC, Routing	7	Flourishing — shared vision & aligned values	Sponsor him for the leadership cohort starting in fall.
Marcus	Director, Hub Ops	5	Fine — transactional more than relational	Skip-level lunch + ask the question I've been avoiding about Q2 misses.
Yvonne	Manager, Carrier Ops	6	Fine — functional, lacks intentionality	Co-design her next-quarter goals together — not hand them to her.
Tony	Peer, Finance	4	Floundering — unresolved tension or avoidance	The hard conversation about the budget tension. Schedule this week.

CIRCLE 5 – ORGANIZATION

Leaders, departments, and stakeholders across the wider organization you influence (or should). Where intentional, where accidental?

NAME / GROUP	DEPARTMENT / LEVER	INFLUEN	WHY THIS SCORE	NEXT RIGHT STEP
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NAME / GROUP	DEPARTMENT / LEVER	INFLUEN	WHY THIS SCORE	NEXT RIGHT STEP
Exec team	C-suite	7	Fine — steady but not deepening	Volunteer to run the next strategy offsite — narrative as backbone.
Atlanta hub leaders	Regional	6	Fine — cordial but rarely vulnerable	Site visit Q2 + listen-only roundtable.
Sales org	Cross-functional	5	Floundering — surface-level, lacks real depth	Joint Monday standup pilot for 6 weeks.

CIRCLE 6 – COMMUNITY

People, networks, and platforms outside your organization where your voice carries weight — industry, city, faith, civic, friendships of consequence.

NAME / NETWORK	CONTEXT	HEALTH	WHY THIS SCORE	NEXT RIGHT STEP
Logistics Industry Council	Industry	6	Fine — reliable cadence, missing real conversation	Submit a talk for the fall summit using the Operations Narrative.
Local church	Faith	8	Flourishing — consistent presence & rhythm	Continue Sunday rhythm; no new commitments this season.
Boys & Girls Club board	Civic	5	Fine — good season, but coasting	Decide by July: re-up for another term or hand the seat to a peer.

INTENTIONAL VS. ACCIDENTAL – WHAT THE INVENTORY REVEALS

Across all six circles, where are you stewarding on purpose and where are you leading by default? Name the gap.

Intentional: my marriage, my coach, my direct reports, my Sunday rhythm. Accidental: peer relationships across the org, my brother, my civic seat. The pattern is clear — when something requires a calendar block, I lead intentionally. When it doesn't, I lead by default.

THE REAL COMMUNICATION CHALLENGE I SOLVED

Pick one relationship from the inventory and walk through the conversation you had (or need to have).

The Tony conversation. We've had a quiet budget tension for two quarters. I've been telling myself it's 'just resource math.' It isn't. I'm avoiding a direct ask: do we actually trust each other to lead this jointly, or have we slipped into vendor mode? Scheduled for Thursday.

MY SIGNATURE STORY (SETTING → STRUGGLE → SHIFT → SUCCESS)

Setting: the carrier crisis of Q2 last year. Struggle: three of our top customers were one missed window away from leaving. Shift: I stopped trying to solve and started asking, 'what would the leader I want to become do here?' Success: we held all three accounts, and the team learned that calm, named anxiety is a leadership move — not a personality trait.

FIVE SIGNATURE STORIES – BUILT ON THE FRAMEWORK

Capture five stories you can tell on demand. Setting establishes the world. Struggle names the real tension. Shift is the turn — what changed, what was learned, what was decided. Success is the outcome and the so-what for your listener.

SETTING	STRUGGLE	SHIFT	SUCCESS
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SETTING	STRUGGLE	SHIFT	SUCCESS
Q2 carrier disruption, war room, 11pm	Three top accounts one missed window from leaving	Stopped solving, started asking the team what they were afraid to say	Held all three accounts; team learned calm is a decision
First 1:1 with Priya after promotion	She was apologizing for decisions I had explicitly delegated	Named the pattern out loud and rewrote the decision rights together	Three months later she escalates 60% less and ships 40% more
Dinner table conversation with Ben, age 13	He asked why I was on my phone again	Put the phone in a drawer for the rest of the evening — every evening	Six months later, our relationship is the thing in my life I am proudest of
Board review, March 2026	Chair wanted weekly reviews for the Atlanta plan	Made the case for monthly, with a clear leading-indicator dashboard	Got monthly + earned a level of trust the role hadn't had before
Walking out of a peer 1:1 with Tony	Realized I had walked in to win, not to listen	Walked back in five minutes later and named it	First honest conversation we'd had in a year — and the working relationship started over

## ATTACHED ARTIFACTS

- Northwind-Operations-Narrative.pdf

139 KB

INSTALLATION V

# Execution Engine

ACT CONSISTENTLY

*"The bottleneck is almost always the leader."*

– WHY THIS INSTALLATION MATTERS

BENCHMARK · 70/100 · EMERGING

## The pain this addresses

Great ideas don't become great results. Your calendar owns you. You're the lid on your own organization.

## What was installed

Install a personal execution framework — how you decide, run your week, manage energy, and turn vision into repeatable action.

TOOLS · 70/30 RULE · 5 GEARS · CAPACITY AUDIT · DECISION-MAKING FRAMEWORK · WEEKLY RHYTHM DESIGN

DELIVERABLE

## Weekly Rhythm + 30-Day Sprint Plan

*A redesigned weekly rhythm and a 30-day sprint for your single highest-priority initiative.*

MY REDESIGNED WEEKLY RHYTHM

*Anchors, deep work, recovery*

Mornings before 9 are mine — no meetings, no Slack. Tuesdays and Thursdays are deep-work days; only one meeting allowed. Friday afternoon is review-and-reset. Saturday is family. Sunday is rest.

WEEKLY RHYTHM – AT A GLANCE

*Map your week. Each row is a time block, each column a day. Anchor the non-negotiables (deep work, recovery, family, fitness, team).*

TIME BLOCK	MON	TUE	WED	THU	FRI	SAT	SUN
Early AM	Workout + reading	Workout + reading	Workout + reading	Workout + reading	Workout + reading	Family breakfast	Rest
AM (deep work)	1:1s	Deep work — Atlanta plan	Exec team	Deep work — narrative	Skip-levels	Family	Church
Midday	Lunch + walk	Solo lunch	Mentee lunch	Solo lunch	Team lunch	Open	Family lunch
PM	Direct reports	Open block	Cross-functional	Open block	Weekly review	Coaching kids	Sabbath
Evening	Family + read	Family + read	Date night	Family + read	Friends	Friends / extended family	Plan the week with Sarah

## 30-DAY SPRINT — ONE INITIATIVE

30-day sprint: Atlanta hub redesign — week 1 stakeholder map, week 2 draft, week 3 tested with 3 skip-levels, week 4 board-ready. Owner: me. Reviewer: Priya. Decision date: end of month.

## MY DECISION-MAKING RULES

Reversible decisions: decide in <24 hours, lowest level. Irreversible: 72-hour cooling period + one outside voice. Decisions involving people: never decided alone, always written down before told.

## WHAT I AM REMOVING TO MAKE THIS REAL

Removing: the Wednesday status meeting (replaced by async dashboard), every meeting under 30 minutes that doesn't have an agenda, and any committee role I can't name a leadership reason for.

## INSTALLATION VI

# Multiplication

MULTIPLY BEYOND YOURSELF

*"The highest level of performance isn't what you produce. It's what you release in others."*

– WHY THIS INSTALLATION MATTERS

BENCHMARK · 58/100 · INCONSISTENT

## The pain this addresses

Growth has a ceiling — you. Your impact ends where your availability ends.

## What was installed

Build beyond yourself — develop others, distribute leadership, create systems that multiply impact without multiplying hours. The centerpiece is the Personal Board of Advisors.

TOOLS · PERSONAL BOARD OF ADVISORS PLAYBOOK · LEADERSHIP PIPELINE · MULTIPLICATION FRAMEWORK · LEGACY PLANNING

DELIVERABLE

## Personal Board of Advisors Blueprint + Multiplication Plan

*Five named board seats across generations and vocations with your written invitation and first-meeting agenda, plus who you're developing, how, and by when.*

PERSONAL BOARD OF ADVISORS

— Not yet captured.

SEAT 1 — ELDER VOICE (NAME + WHY)

Marcus W. — Former CEO, 30 years in the industry. The elder voice. Has lived every decision I'm about to make and will tell me the cost I'm not seeing.

SEAT 2 — PEER VOICE

Priya K. — Peer COO at a sister carrier. Same problems, two years ahead. The peer voice who will not let me posture.

SEAT 3 — YOUNGER VOICE

Jordan L. — Senior IC on my team, ten years younger. The younger voice. Asks the questions everyone in the room is thinking but won't say.

SEAT 4 — OUTSIDE-VOCATION VOICE

Dr. Elena R. — Pediatrician, family friend. The outside-vocation voice. Reads me as a husband and father, not as an executive — and sees patterns my industry blinds me to.

SEAT 5 — TRUTH-TELLER

Sam B. — My executive coach. The truth-teller. Standing permission to interrupt me, anytime, on anything.

## MY WRITTEN INVITATION

I am asking five people to walk with me as a Personal Board of Advisors for the next twelve months. Quarterly 60-minute conversations. I will bring the agenda. You bring the truth. Your only job is to tell me what you see — including the parts I would rather not hear. In return, I will receive it, sit with it, and report back what I did with it. This is not a favor I'm asking; it is an investment in the leader I am trying to become, and the leaders I am trying to build.

## FIRST-MEETING AGENDA

- 1) What does my best look like to you right now? (5 min)
- 2) What is one pattern you've noticed that I likely haven't named? (15 min)
- 3) Where am I avoiding a hard conversation? (15 min)
- 4) What would you do in my seat next quarter? (15 min)
- 5) What do you need from me — and how can I add value to your work this quarter? (10 min)

## MULTIPLICATION PLAN

— Not yet captured.

## SUCCESSOR / NEXT-UP I AM DEVELOPING

Priya — Director of Dispatch. Twelve-month arc: Q1 shadow + co-lead, Q2 lead with my review, Q3 lead independently, Q4 own the function fully and choose her own #2.

## THREE MORE I AM POURING INTO

Jordan (Routing) — sponsor for fall leadership cohort.

Marcus (Hub Ops) — quarterly skip-level coaching focused on his next role, not his current one.

Yvonne (Carrier Ops) — co-design goals; introduce her to two leaders in my network this year.

## WHAT I AM RELEASING THIS QUARTER

Releasing the dispatch playbook ownership to Priya. Releasing the weekly carrier sync chair to Jordan. Releasing one board prep deck per quarter to whoever on the team can grow most by building it.

## THE LEGACY STATEMENT I AM LEADING TOWARD

The legacy I am leading toward: when people who worked for me describe their best leadership, they describe a person they became — not a person they reported to. The org is stronger because I led it. The next generation is more ready because I built them.

WHAT COMES NEXT

# The portfolio is the floor. Not the ceiling.

The work documented in these pages is real. It is also incomplete — by design. A leadership operating system is not something you finish; it is something you keep running, refining, and handing to the next person who needs it.

For Alex Morgan, the next horizon is multiplication. Take what you've installed and put it in the hands of two more people whose growth you've been entrusted with. Run the same playbook with them. Let your portfolio become their on-ramp.

Quarterly: come back to this document. Re-score the benchmark. Re-walk the six circles. Re-write the weekly rhythm to match the season you're actually in. The portfolio is a living instrument; treat it like one.

Annually: invite a peer or a coach to read this with you. Ask one question — "where am I telling the safe version of the story?" — and rewrite the page that comes back red.

WHAT THIS PORTFOLIO PROVES

*You did the work.*

Now lead like someone who knows it.

MULTIPLYLEADERCOACHING.COM