

THE SECOND BRIEF · THE WORKBOOK

The Workbook

The Workbook of The Second Brief

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Santa Anna, A. (2026). The Workbook. In The Second Brief (The Workbook). Luminous Prosperity Inc. https://doi.org/10.5281/zenodo.23989177
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THE LICENCE

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Published by Luminous Prosperity Inc. for Haute Lumière. Author ORCID 0009-0008-3244-0306.

DOI 10.5281/zenodo.23989177 · this record's page: business.hautelumiere.life/library/the-second-brief/13-the-workbook/

Please cite as: Santa Anna, A. (2026). The Workbook. In The Second Brief (The Workbook). Luminous Prosperity Inc. https://doi.org/10.5281/zenodo.23989177

The Workbook of The Second Brief. The whole book, with every chapter, is at business.hautelumiere.life/library/the-second-brief (DOI https://doi.org/10.5281/zenodo.23989141).

A NOTE BEFORE YOU READ

This work is offered for education and leadership development. It is not legal, financial, accounting, investment, medical or psychological advice; take the advice of a qualified professional who knows your circumstances. Companies and events are described from the public record as the author understands it; characterisations are the author's analysis. Examples are illustrative, and no particular outcome is promised to any reader.

ABSTRACT

Every tool in this book, gathered in one place, in the order a programme uses them. Each is reproduced as it appears at the end of its chapter, so that the workbook can be printed and kept on a desk or a wall without the chapters beside it. The chapter each comes from explains why it is built the way it is; read that chapter once before using a tool for the first time. The tools fall into three groups. The first six help an organisation or a household see itself and test its plans: the ledger, the test, the map, the inventory, the case sheet and the audit. The next three keep a programme honest: the stock card, the conversation card and the kitchen-table ledger. The last two put everything in sequence: the twelve-month programme sheet for an organisation that wants to run the whole year, and the ninety-day plan for one that wants to begin this quarter.

THE WORKBOOK

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Every tool in this book, gathered in one place, in the order a programme uses them. Each is reproduced as it appears at the end of its chapter, so that the workbook can be printed and kept on a desk or a wall without the chapters beside it. The chapter each comes from explains why it is built the way it is; read that chapter once before using a tool for the first time.

The tools fall into three groups. The first six help an organisation or a household see itself and test its plans: the ledger, the test, the map, the inventory, the case sheet and the audit. The next three keep a programme honest: the stock card, the conversation card and the kitchen-table ledger. The last two put everything in sequence: the twelve-month programme sheet for an organisation that wants to run the whole year, and the ninety-day plan for one that wants to begin this quarter.

None of them needs software. All of them work better filled in by hand, by the people who do the work, and kept. A tool filled in once is an exercise. The same tool filled in every month for a year is evidence.

Copies of these pages may be made for use inside your own organisation or household.

The Three-Column Ledger

*From chapter 2.*A one-page ledger, kept monthly, for a firm or a household. It needs no software. It asks for three columns where most ledgers keep one, and its only rule is that every line must be filled in all three before the month is closed.

Heading of the page- Organisation or household: __- Month: _- *The stock we have chosen to watch (one only, from section 4 above): - How its condition is described or measured, in words someone outside could check: - Its condition at the start of the month: ___*

The ledger, one line per significant activity (five to fifteen lines)

ACTIVITY	COLUMN 1 · WHAT IT TAKES (MATERIALS, ENERGY, TIME, ATTENTION, MONEY)	COLUMN 2 · WHAT IT RETURNS, AND TO WHOM (PRODUCT, SERVICE, WAGE, BY-PRODUCT, REPAIR)	COLUMN 3 · WHAT IT LEAVES BETTER, WORSE OR THE SAME IN THE CHOSEN STOCK	VERB IT CURRENTLY ANSWERS: REDUCE / SUSTAIN / REGENERATE

The loops, one line for anything that leaves the building

WHAT LEAVES	WHERE IT GOES NOW	COULD IT BE REPAIRED OR REUSED BEFORE IT LEAVES?	IS THERE A NEIGHBOUR WHO COULD USE IT AS AN INPUT?	IF NEITHER, CAN IT BE RECOVERED AS MATERIAL?

The close of the month- Lines where Column 3 says *better*: __ (count)- Lines where Column 3 says *worse*: _ *(count), and the one to change first: - Condition of the chosen stock at the end of the month: - One activity whose verb could move from reduce to regenerate next month, and what it would take: - Does the ledger still pay its way? Revenue or household income less costs: $___*

How to use it. Fill it in once alone, then once with the people who do the work, because they will know what leaves the building better than the person who signs for it. Do not average the three columns into a score; the point is to see them side by side. After three months, compare the first and third pages. A ledger that shows more *better* lines and an unchanged bottom line has met the second brief on a small scale, which is the only scale on which it has ever been met.

The Leak and Rebound Test

*From chapter 3.*Six questions, put to any plan described as circular or regenerative, before it is approved. Each needs a written answer. A plan that cannot answer one is not rejected; it is returned with that question marked.

The plan- Name of the plan or product: __- Owner: _ · *date: - The verb it claims (reduce / sustain / regenerate):* ___

Question 1 · Which loop? (from Haas and colleagues, and the second chapter)- Is this repair or life extension / by-product exchange / material recovery? __- If material recovery, why not repair or exchange first? ____

Question 2 · Where is the boundary? (from Korhonen and colleagues)- The loop is claimed to close inside: the product / the site / the firm / the region / other __- What happens to the same material outside that boundary, upstream and downstream: ____

Question 3 · How many passes, and at what quality? (thermodynamics)

MATERIAL	USEFUL PASSES EXPECTED	QUALITY KEPT ON EACH PASS (FULL / REDUCED / DOWNGRADED)	WHAT IT BECOMES AT THE END

Question 4 · What does it displace? (from Zink and Geyer)- The circular product or service replaces: __- Evidence that buyers use it instead of, not as well as, the primary product: _*- Is it cheaper? If so, what is expec-*

ted to happen to total quantity bought: - One design change that would increase displacement (trade-in, take-back, lease): ___

Question 5 · Which stock, and how will we know? (from Newton and colleagues, and the second chapter)- The stock this plan is meant to leave in better condition: __- Its condition now, in words or a number someone outside could check: _- *The date by which a change should be visible, and how it will be checked: ___*

Question 6 · Will it survive a bad year? (from Santa Anna's somatic bottleneck)- Which routine form, review or budget line this plan is written into: __- What would have to be true for it to be cut, and who would decide: ____

Reading the answers. A plan with clear answers to questions 4 and 5 is worth more than a plan with an impressive answer to question 1. The order of the questions is the order in which plans usually fail: they choose the cheapest loop, draw the boundary where it flatters them, forget that each pass costs quality, add to the pile instead of replacing it, never name the stock, and are cut in the first bad quarter. A plan that passes all six is rare, and is the beginning of a regenerative practice rather than a statement about one.

The Metabolism Map

*From chapter 4.*A one-sheet map, drawn by a team of three to six people in about two hours, on a large sheet of paper or a whiteboard. It replaces the conveyor belt with a circulation and asks the five questions of it. Draw it once now and once in six months.

Step 1 · The centre (15 minutes). In the middle of the sheet write the organisation, team or household, and one sentence: *the systems we depend on and do not own are* __, _, ___. Choose three: for example, the farms that supply us, the town our staff live in, the river we discharge to, the trade that trains our people.

Step 2 · What comes in (20 minutes). Around the left side, list every significant input: materials, energy, water, money, people's time and skill, information, goodwill. For each, write where it comes from by name.

Step 3 · What goes out (20 minutes). Around the right side, list every output: products, services, wages, taxes, by-products, waste, emissions, information, reputation. For each, write where it goes next by name. Leave a blank where you do not know.

Step 4 · What comes back (20 minutes). Draw arrows from right to left for every flow that returns: repeat custom, feedback, returned products, materials a supplier takes back, people who come back to work, referrals. Count them. A map with few return arrows is a conveyor belt.

Step 5 · The five questions (40 minutes). Answer each in writing on the sheet.

PRINCIPLE	QUESTION	ANSWER FOR THIS ORGANISATION	ONE CHANGE WORTH TRYING
Circularity			

PRINCIPLE	QUESTION	ANSWER FOR THIS ORGANISATION	ONE CHANGE WORTH TRYING
	For every output, who uses it next? How many blanks in step 3?		
Diversity	For each critical input, how many independent sources? Where is there only one?		
Redundancy	Could we absorb the loss of any one supplier, person or system for a month? Which one could we not?		
Reciprocity	For our three largest relationships, what do *they* say the relationship returns to them? (Ask, then write their answer.)		
Distributed intelligence	Who below the leadership can stop a process, change a supplier or redirect a waste stream without asking?		

Step 6 · Patent but unhealthy (5 minutes). Mark with a circle any flow that is working (on time, paid, delivered) while depleting the system it runs through. These are the places the conveyor belt could not see.

Step 7 · One change (5 minutes). Choose one change from the last column, name its owner and its date. Only one.

How to read it in six months. Compare the number of blanks in step 3, the number of return arrows in step 4, and the circles in step 6. Fewer blanks, more arrows and fewer circles mean the metabolism is moving towards surplus. If the numbers have not moved, the change chosen in step 7 was the wrong one, or was never made, and the map will usually show which.

The Waste-Is-Food Inventory

*From chapter 5.*An inventory for finding the kernels Chertow describes: exchanges that already make sense and have not yet been arranged. It takes one person about an hour to start and a week of noticing to finish. It works for a business, a school, an office or a household.

Part 1 · What leaves (one week of noticing)

OUTPUT	ROUGHLY HOW MUCH, HOW OFTEN	WHERE IT GOES NOW	COST TO DISPOSE OF IT NOW	IS IT KEPT SEPARATE, OR MIXED WITH OTHER WASTE?

Include materials, food, packaging, heat, water, equipment no longer used, skills nobody is using, and time (empty rooms, idle vehicles, quiet hours).

Part 2 · Who might want it (one afternoon of calls)

For each output, list three possible users within a short distance: a farm, a garden, a school, a workshop, a charity, a neighbouring business, a maker, a local authority service. Ask each one question: *would this be useful to you, and in what form?*

OUTPUT	POSSIBLE USER 1 · ANSWER	POSSIBLE USER 2 · ANSWER	POSSIBLE USER 3 · ANSWER

Part 3 · The higher loop first

For each output with an interested user, before agreeing, ask:- Could it be used longer or repaired by us first? __- Could it be passed on whole, as it is, before it is broken down? _- *Only then: should it be recovered as material (compost, recycling)?* ___

Part 4 · The kernel

For each exchange you agree:- What it replaces for the other party (what would they otherwise buy or use?): __- What the other party says the relationship gives them, in their words: _- *What it costs us: money · time - Which routine it is written into (rota, delivery schedule, contract): - Date of first exchange: · date of first review:* ___

Part 5 · The review (three months on)- Exchanges still running: __ of _- *For each, has it replaced something, or added to the total? - The stock we chose to watch (from the Three-Column Ledger): condition now, and how we know: - The next output from Part 1 to find a user for:* ___

How to read it. Most inventories find two or three kernels in the first week. The temptation is to arrange all of them at once. Arrange one, write it into a routine, and wait until it has run for a month before arranging the next. Kalundborg grew one agreement at a time over decades, and that, on Ehrenfeld and Gertler's account, is why it held.

The Case Reading Sheet

*From chapter 6.*A one-page sheet for reading any celebrated regenerative case, from a book, a conference talk or a competitor's report, before it is used to justify a decision. It takes about an hour with the case's own sources open.

The case- Organisation and period: __- Where the account comes from (the firm's own report / trade press / a book / an academic study): _- *Date of the figures, and the date of the account that repeats them:* ___

Part 1 · The figures

FIGURE AS QUOTED	WHERE IT FIRST APPEARS	TOTAL OR PER UNIT?	BASELINE YEAR	SCOPE (PRODUCT, SITE, WHOLE FIRM)	SELF-REPORTED OR INDEPENDENTLY CHECKED?

FIGURE AS QUOTED	WHERE IT FIRST APPEARS	TOTAL OR PER UNIT?	BASELINE YEAR	SCOPE (PRODUCT, SITE, WHOLE FIRM)	SELF-REPORTED OR INDEPENDENTLY CHECKED?

- Does any figure differ between the original and the account you were given? Which, and by how much: _____
- Is any financial claim (profit, revenue, cost saving) attached to the environmental results? Where is it in the firm's own financial statements: _____

Part 2 · The mechanism- Who started it, and at what level of the organisation: __- The goal as stated (a percentage, or an end state and a date): _- *The specific changes made, in the order they were made, as far as the record shows: - How results were published, and for how long: - What happened when the founder or sponsor left: - The next goal, and when it was set:* ___

Part 3 · What is missing- Failures or abandoned projects the account mentions: __ (if none, write *none mentioned*)- What the case does not show (causation, totals, comparison with similar firms): ____

Part 4 · What transfers- The one move from Part 2 that would work in our organisation, at our scale: __- The figure from Part 1 that we will not repeat to our board without its scope and baseline: ____

How to use it. Fill in Part 1 before anyone quotes the case in a meeting. Most celebrated figures survive the sheet in a narrower form, and the narrower form is the one worth repeating. Part 4 is the reason for the exercise: a case is useful when it changes what you do next, not when it decorates a slide.

The Neighbour and Owner Audit

*From chapter 7.*Two short exercises, one for each relationship. Each takes about an hour, and both are better done by two people who see the organisation from different places.

Part 1 · Neighbours

List the five organisations nearest to you, by distance or by flow, that you exchange anything with besides money for a product.

NEIGHBOUR	WHAT WE GIVE THEM	WHAT THEY GIVE US	WHAT PROBLEM IN THEIR OPERATIONS DOES IT SOLVE?	WHO ARRANGED IT, AND IS IT WRITTEN INTO A ROUTINE OR CONTRACT?

Then list three neighbours you do not exchange with:

NEIGHBOUR	ONE THING WE DISCARD THAT THEY MIGHT USE	ONE PROBLEM OF THEIRS WE MIGHT HELP WITH	WHO WILL CALL THEM, AND BY WHEN

Part 2 · Owners

For each regenerative commitment the organisation has made, mark where it is written.

COMMITMENT	FOUNDER OR LEADER'S WORD	POLICY DOCUMENT	BOARD RESOLUTION	SUPPLIER OR CUSTOMER CONTRACTS	ARTICLES, OWNERSHIP OR FINANCING TERMS

- If the organisation were sold next year, which commitments would survive, and why: _____
- If the leader who sponsors them left next year, which would survive: _____
- One commitment to move one column to the right this year, and who will do it: _____

How to read it. Part 1 finds the next exchange. Part 2 finds the commitment most at risk. A commitment that sits only in the first column of Part 2 is a promise a person has made; each column to the right makes it more the organisation's. Steward ownership is the last column carried as far as it will go. Most organisations will not go there, and do not need to, to make their commitments a great deal safer than they are.

The Stock Card

*From chapter 9.*One card for each stock the programme watches. It fits on a single page and is updated each quarter.

The stock- Name of the stock: __- Why the organisation depends on it: _- *Who else depends on it:* ___

How its condition is known- Measured (instrument, method, who measures, how often): __- Described (the questions asked, of whom, how often): _- *If neither yet: not measured, and the first step to measuring it:* ___

The prediction (written before the programme starts)- Baseline condition, and date: __- Expected condition at the first review, and date: _- *Expected condition at the end of the time to show, and date: - What would tell us the prediction was wrong:* ___

The flows meant to change it

FLOW	LEADING MEASURE	REPORTED TOTAL OR INTENSITY?	OWNER

The quarterly reading

QUARTER	FINANCIAL LINE	LEADING MEASURES	CONDITION (MEASURED OR DESCRIBED)	COMPARISON, IF ANY	WHAT ELSE MOVED	NOT MEASURED

How to read it. Read the condition column against the prediction, not against the previous quarter alone. Read the *what else moved* column before celebrating any result. Keep the *not measured* column full of honest entries until each one has been replaced by a measure or a description. A card that has stayed the same for four quarters, with every column filled, is the best evidence an organisation can have about its own second brief.

The Conversation Card

*From chapter 10.*One card, prepared before any of the five conversations, and kept afterwards.

Before- Who, and what they decide: __- What they most need from this conversation (in their terms, not ours): _- *The three things in their likely objection that are true: , , - The stock we will name, and its condition today: - What we will ask for, kept small: - Where our evidence stops (not measured): - One question about the state of the room, ours and theirs, to hold in mind: ___*

After- What they decided: __- What they said, in their words, about why: _- *What we conceded: - What is now easier to ask for next time, and when: - What it cost the person who made the case, and what will be done about it:* ___

How to use it. Fill in the first half the day before, not an hour before, so there is time to change the request. Fill in the second half the same day. Keep the cards together; read them before the next conversation with the same person. Over a year they become a record of how trust in the programme has moved, which is as important a stock as any the programme watches.

The Kitchen-Table Ledger

*From chapter 11.*A monthly page for one person or one family. It takes about half an hour at the end of each month.

The page- Household: __ · month: _- *The stock we have chosen to watch this year (the home and its things / the people / the reserve / the relationships beyond the door / the ground): - Its condition at the start of the year, in one sentence: - Its condition now, in one sentence: ___*

The month, one line for each significant activity (five to ten lines)

ACTIVITY	1 · WHAT IT TOOK (MONEY, TIME, ATTENTION)	2 · WHAT IT RETURNED	3 · WHAT IT LEFT BETTER, WORSE OR THE SAME IN OUR STOCK	4 · (OPTIONAL) MORE OR LESS ALIVE AFTERWARDS?

What left the house

WHAT	WHERE IT WENT	COULD IT HAVE BEEN USED LONGER OR REPAIRED?	PASSED ON WHOLE?	ONLY THEN: RECYCLED OR COMPOSTED?

The close of the month- One thing mended, kept or passed on: __- One exchange with a neighbour, or one to try next month: _- *Income less spending for the month: $- What is in better condition than it was: - What we will keep doing next month, and what we will stop:* ___

How to use it. Fill it in together if there are two of you, and keep the conversation short. Do not score it. After three months, lay the three pages side by side and read only the *better condition* lines. If there are more of them in the third month than the first, the household has met the second brief at the only scale on which anyone ever meets it, which is its own.

The Twelve-Month Programme Sheet

*From chapter 8.*One page, kept by the owner and reviewed by the sponsor at each decision point.

The programme- Organisation: __ · sponsor: _ · *owner: - Work team: · sceptic: · finance partner: · neighbour contact: - Decision 1, the verb: - Decision 2, the stock, and how its condition will be described: - Decision 3, the boundary of the first cycle: · time to show:* ___

The year

WEEKS	PHASE	WHAT HAPPENS	LEAD ROLE	DECISION AT THE END	DONE (DATE)
1–4	See	Verb on proposals; ledger; map; inventory; calls	owner, work team, neighbour contact	4 · one change, one exchange (sponsor)	
5–8	Test	Leak and Rebound Test; finance page; proposal to neighbour; write into routines	sceptic, finance partner, owner	5 · approve, revise or stop (sponsor)	
9–16	Start	Run both items; check routines; check displacement; team debrief	owner, sceptic, work team	6 · continue, revise once, or stop (owner, sponsor)	
17–26	Hold	Condition measure on dashboard; call other users; move one commitment; redraw map	owner, neighbour contact, sponsor	7 · half-year review (sponsor, to board)	
27–52	Second cycle	New change and exchange; revenue-model experiment	owner, finance partner	8 · annual review (board)	

The decision log

DATE	DECISION	MADE BY	EVIDENCE	REVISIT IF

How to keep it honest. Add nothing outside the sequence. Write *not measured* wherever that is true. If a phase overruns, extend it rather than skip the next one. At the end of the year, the sheet and the log together are the evidence the board needs, and the evidence the next owner will read first.

The Ninety-Day Regeneration Plan

*From chapter 12.*One page, kept by the person who owns the plan, with a short review at the end of each month. It gathers four of this book's tools, from chapters 2 to 5, into a sequence. It is written for a small or mid-sized organisation; a household can use the same weeks with fewer people.

The plan- Organisation or household: __- Owner of this plan: _ · *start date: - The stock we depend on and do not own, chosen to watch: - Its condition at the start, described so someone outside could check: - The other people and organisations that depend on the same stock:* ___

Weeks 1 to 4 · See it

WEEK	TASK	TOOL	WHO	DONE (DATE)
1	Write the verb on every proposal in progress	Chapter 2	owner	
1–4	Keep the Three-Column Ledger	Chapter 2	owner + one other	
2	Draw the Metabolism Map	Chapter 4	three to six people who do the work	
3	Run the Waste-Is-Food Inventory, part 1 (one week of noticing)	Chapter 5	everyone, briefly	
4	Inventory parts 2 and 3: calls to possible users, higher loop first	Chapter 5	one person	

End of month 1 review (one hour)- Blanks remaining on the map: __- Lines on the ledger that say *worse* in Column 3: _- *Possible exchanges found: - The one change chosen from the map: · owner* ___

Weeks 5 to 8 · Test it

WEEK	TASK	TOOL	WHO	DONE (DATE)
5	Put the chosen change and the best exchange through the Leak and Rebound Test	Chapter 3	owner + one sceptic	
5	Write down what each will displace, and how that will be checked	Chapter 3, question 4	owner	

WEEK	TASK	TOOL	WHO	DONE (DATE)
6	Arrange one exchange only; write it into a rota, schedule or contract	Chapter 5, part 4	one person	
6	Start the chosen change; write it into a routine, not a project	Chapter 3, question 6	its owner	
7–8	Keep the ledger; note anything that surprises	Chapter 2	owner	

End of month 2 review (one hour)- Is the exchange running? __ · what does the other party say it gives them? _- *Is the change running? · has anything been displaced, or only added?* ___

Weeks 9 to 12 · Join it

WEEK	TASK	WHO	DONE (DATE)
9	Check the revenue model: do we earn more when things last longer, or less?	owner + finance	
10	Contact one other user of the chosen stock; ask what they are doing about it	owner	
11	Ask what happens to these commitments if the organisation is sold or the owner leaves; write the answer down	owner	
12	For the gains found this quarter, record who found them and what they received	owner	

End of quarter (two hours)- Condition of the chosen stock now, and how we know (or *not measured*, if not): __- Ledger: lines that moved from *worse* or *same* to *better*: _- *Financial line for the quarter (revenue or income less costs), compared with the previous quarter: - Exchanges running: · changes running: - What we now believe about our organisation that we did not believe in week 1: - The next stock, exchange or change for the next ninety days:* ___

How to keep it honest. Add nothing until the first exchange and the first change have run for a month. Write *not measured* wherever that is true. Keep the first quarter's page beside the second. The difference between them is the evidence a published study cannot provide for your organisation, which is the only one you run.

Beginning on Monday

If you are not sure where to start, start with three things this week. Write the verb, reduce, sustain or regenerate, at the top of the next proposal you sign. Choose one stock you depend on and do not own, and write its condition today in one sentence someone outside could check. And open the Three-Column Ledger for this month. Everything else in this workbook follows from those three, in the order the ninety-day plan sets out.

Ecstatic Economics is the book this one was written beside. The companion books on the doughnut (*The Standing Forest*), the commons (*The Pasture Was Never Empty*), patient capital (*The Long Clock*) and gainsharing (*The Gain Was Always Shared*) take up the questions chapter 12 opens. More from Ammanuel Santa Anna and Haute Lumière at hautelumiere.life.

The condition things are left in

A plan marked circular should be able to say what condition anything is meant to be in at the end of it. The figures that answer are usually already in the drawer.

Luminous Prosperity Inc. takes this work into organisations as a gainshare. The flow is opened from the inside, with the people who already hold what the firm knows. The gain is counted from records the firm already keeps, against a measure both sides sign before anyone knows the answer, and the house is paid as a share of what is found: between thirty and ten per cent of it.

The field manual carries one organisation through the sequence. What your own operations leak, and what closing a loop would return, is read from your records and your people. That begins with a conversation.

REQUEST A CONVERSATION

The Workbook

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