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Plan Your 2026 With Clarity and Intention

This is the annual planning framework we use with our Dynamite Circle members running 7-figure businesses. Whether you're just starting out or have grown significant revenue, this framework will help you plan your next year in business with clarity and intention.

Goal and Plan

1. 2026 Goal – Revenue & Profit
2. Key Plan and Core Constraint (90 Days)
 - a) Write out a relatively detailed plan to unlock the next constraint. This plan addresses your most efficient path towards the revenue and profit goal.
 - b) What metrics will you use to track the plan?

Systems

3. 💰 BUDGET (MONTHLY)
 - a) Complete Your Cash Flow Spreadsheet – Ideally 1) GOAL scenario and 2) YOY no change.
 - b) Complete: Company expense and team Labor Efficiency Ratio (LER) audit.
[More on LER here.](#)
 - c) Perform a Staff Audit – are they contributing to the plan? If not, make changes.
4. 📊 SCOREBOARD (WEEKLY)

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- a) Translate your cash flow goal scenario onto a simple-to-understand scoreboard. [Check out our scoreboard template here.](#)
- b) [Another scoreboard example](#)
- c) Bonus: Add a company cover sheet with your annual theme, Job to Be Done, and Brand Promise

5. 🧑 SCORECARDS (QUARTERLY)

- a) KPIS and key areas of responsibility
- b) Back to team with clarity on areas of responsibility (metrics)
- c) [Check out our scorecard template here.](#)

6. 📅 CADENCE (DAILY/WEEKLY/MONTHLY/QUARTERLY)

- a) Can we speed up our execution?
- b) Can we have more efficient meetings?
- c) Who speaks to whom and why? What are the agendas?
- d) [Check out our Daily Huddle template here.](#)

Reflection

7. Stop Doing...

→ What can we get rid of and still meet our goals?

8. Start Doing More...

→ Based on our historical data, what should we be doing more of? How much of it can we do?

9. Health (Personal)

→ What can we learn about or change to have more energy as founders (and as a team?)

10. Purpose (Personal)

→ Who can I help this quarter? How?

Revisit

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- How focused are you (and your co-founders) on the goals above, now that the path is written out?
- Is the goal a true priority in terms of energy and resources?
- What are some other priorities?