To fill out this worksheet, go to "File" and click "Make a copy." You can make a copy as a Google user, or Download the document if you do not have a Google account.



# 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.

    <u>More on LER here.</u>
  - c) Perform a Staff Audit are they contributing to the plan? If not, make changes.

To fill out this worksheet, go to "File" and click "Make a copy." You can make a copy as a Google user, or Download the document if you do not have a Google account.

- 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)
- $\rightarrow$  Who can I help this quarter? How?

## **Revisit**

To fill out this worksheet, go to "File" and click "Make a copy." You can make a copy as a Google user, or Download the document if you do not have a Google account.

- 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?