

2026 Business Reflection & Planning Workbook

1. Welcome to Your 2026 Planning Workbook

This workbook is designed to help you reflect on your 2025 year in business, understand what worked, identify improvement areas, and plan intentionally for the year ahead.

Use this document to gain clarity, set achievable goals, and position your business for a successful 2026.

SECTION 1 – Reflecting on Your 2025 Year

1.1 What Went Well in 2025?

List the wins, achievements and areas where you made progress - large or small

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1.2 What Didn't Go So Well in 2025?

Consider challenges, bottlenecks, financial stress points or things you wish had gone differently

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1.3 What Did You Learn This Year?

Reflect on key lessons that will influence how you approach 2026

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1.4 Your 2025 Financial Snapshot (Optional)

You may want to record the following;

- Total revenue
- Profit margin
- Biggest expense categories
- Most profitable client or service
- Least profitable client or service

SECTION 2 - Reviewing your Services & Profitability

2.1 List the Products or Services You Offer

Include whether each is more profitable and/or enjoyable

Product/Service	Profitability (High/Med/Low)	Do You Enjoy Delivering It?

2.2 Rank Your Products/Services in Order of Profitability

1.
2.
3.
4.
5.

2.3 Rank Your Products/Services in Order of How Much You Enjoy Delivering Them

1.

2.

3.

4.

5.

2.4 Compare Profitability vs Enjoyment

Questions to reflect on:

- Which services are both profitable and enjoyable?
- Which services are profitable but draining?
- Which services are enjoyable but not profitable?
- What services may need re-pricing, restructuring or discontinued in 2026?

SECTION 3 - Your Vision for 2026

3.1 What Do You Want Your Business to Look Like?

Use prompts such as:

- How many hours per week do you want to work?
- What type of clients do you want more of?
- What kind of work would you like less of?
- Do you want to hire staff?
- Do you want to step back from day-to-day tasks?

Write your 2026 vision here:

Three empty rectangular boxes stacked vertically for writing a vision statement.

SECTION 4 - Setting Your 2026 Business Goals

4.1 Your Top Annual Goals for 2026

These may include:

- Revenue target (eg \$200k)
- Profit goal
- Hiring new staff
- Outsourcing tasks
- Increasing prices
- Working fewer hours
- Stepping into more CEO/managerial tasks
- Creating new products/removing old ones

List your top 5 annual goals:

1.

2.

3.

4.

5.

SECTION 5 - Monthly or Quarterly Goals for 2026

Choose the format that works best for you

5.1 Monthly Breakdown

Monthly Key Goals Notes/Actions

Jan

Feb

Mar

Apr

May

Jun

Jul

Aug

Sep

Oct

Nov

Dec

OR

5.2 Quarterly Breakdown

Quarter Focus Area Target Key Actions

Q1

Q2

Q3

Q4

SECTION 6 - Action Plan

6.1 What support do you need?

(Eg bookkeeper, accountant, software, training, staff)

SECTION 7 - Accountability

How will you track your progress?

- Monthly review
- Quarterly review
- KPI dashboard
- Meetings with your accountant or business coach

How will you track your progress?

- Myself
- A team member
- My coach
- My accountant

SECTION 8 - Final Reflection

How do you want to feel in your business by the end of 2026?

(Eg confident, organised, profitable, less stressed, more in control)