

2026

**SET YOUR INTENTIONS,
SHAPE YOUR FUTURE!**

*3-Month Business
Action Planner!*

UBUNTU Business™



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3-Month Business Action Planner!

Dear Entrepreneur

This action planner has been created for you, the visionary, the builder, the person who is ready to turn their ideas into reality. It is here to support you in taking deliberate, consistent steps towards achieving your VISION for the year ahead, starting with a clear focus on the first quarter.

To get started you'll need to choose your top 3 GOALS, i.e. one meaningful goal for each month. Once you have identified these monthly goals, you will break them down further into 4 ACTIONS per goal, one focused action for each week. From there, you will distil your weekly actions into your top 1 PRIORITY each DAY: the one thing that, if completed, will move you closer to your goal and ultimately towards your bigger vision.

This simple yet powerful structure, Vision → Monthly Goals → Weekly Actions → Daily Priorities, is designed to help you move out of overwhelm and into clarity. Instead of carrying everything in your head, you will have a written roadmap that guides your energy, time, and attention. By working with this planner consistently, you are choosing to be intentional rather than reactive.

Action planning will help you clarify your goals and objectives, making them concrete and measurable rather than abstract ideas. When you know exactly what you are aiming for, it becomes much easier to decide what to say yes to, and just as importantly, what to say no to. This clarity will improve your decision-making and help you stay focused and on track, even when distractions arise or unexpected challenges appear.

Effective planning also helps you to anticipate and manage risks, which is crucial for the success and sustainability of your business. By mapping out your goals and actions in advance, you can identify potential obstacles earlier and think through how to navigate them. This proactive approach reduces stress, increases confidence, and allows you to respond strategically instead of reacting in panic when things don't go as expected.

In addition, planning in this way will assist you in allocating your resources such as time, money, and labour, more wisely. As an entrepreneur, these resources are limited and extremely valuable. When you are clear about your priorities, you can ensure that your calendar, your budget, and your team's efforts are aligned with what truly matters. This alignment can significantly improve the efficiency, productivity, and profitability of your business.

You will also find that structured action planning creates momentum. Completing each day's top priority is a small win. Those small wins compound into bigger achievements over weeks and months. Instead of feeling stuck or busy without progress, you will be able to look back and see a clear trail of meaningful actions you have taken.

As you work through this planner, remember that it is a tool to serve you, not a rigid set of rules. Adjust, refine, and adapt your goals and actions as you learn more about what works best for you and your business. Entrepreneurship is a journey, and this planner is here to help you navigate it with greater focus, intention, and purpose.

Make 2026 a year where your ideas become plans, your plans become actions, and your actions lead you steadily towards the vision you hold in your mind's eye.

To your clarity, courage, and consistent action.

Yours in entrepreneurship.

Dr Gary Smith
Chief Entrepreneurship Officer



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How This Planner Works

Use this simple flow as you move through the pages:

1. **Life Check** – #situationrightnow. Understand where you are in your life and finances today.
2. **Year in Review** – 2025. Capture your wins, lessons and what you're ready to let go of.
3. **The Year Ahead** – 2026. Clarify your big vision, top objectives and Ubuntu impact.
4. **Quarterly Action Plan (3-Month View)**. Choose your top 3 monthly goals and map weekly priorities.
5. **Weekly Action Plan**. Set weekly focus, daily #1 priorities and key habits.
6. **Quarterly Review**. Review, learn, celebrate and reset your focus for the next quarter.
7. **Metrics and Scoreboard**. Track the numbers that tell the story of your progress.

How to Get the Most out of this Action Planner

1. Start with reflection.

Begin by reflecting on your current situation and how you feel about each aspect of your life. Then define your vision for the year ahead – what you want to achieve and how you want to develop yourself personally and professionally.

2. Clarify your vision and big objectives.

Once you have a clear vision, decide exactly what you will need to do to make it a reality. These become your top annual objectives and your quarterly focus.

3. Break goals into actions.

Make a list of everything you will have to do to achieve your goals – specific tasks, activities, and milestones. Break your goals down into smaller, actionable steps that you can schedule weekly and daily, and track your progress along the way.

4. Organize your plan.

Organize your list into a practical sequence of tasks. Create a timeline and schedule, with checkpoints to measure your progress and to spot potential roadblocks or challenges early.

5. Choose your #1 priority each day.

Select your number one, most important task for each day – the one that will have the biggest impact on your progress towards your goals. By focusing on this top priority, you avoid getting stuck in distractions and low-value activity.

6. Practice visualization and self-belief.

Regularly visualize yourself achieving your goals. Imagine what you see, hear and feel once you've succeeded. Visualization builds focus, motivation and belief in your ability to succeed, and helps you overcome self-doubt and fear.



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Life Check - #SituationRightNow

How do I feel about each aspect of my life?

For each area, rate from 1 (very unhappy) to 5 (very happy) and write a short note.

| AREA | SCORE (1 – 5) | Why did I choose this score? |
|---------------------------------------|---------------|------------------------------|
| Emotional and Spiritual | | |
| Health and Wellness | | |
| Family and Friends | | |
| Personal Development and Education | | |
| Rewards and Celebrations | | |
| Business Impact (Clients and Results) | | |
| Community (Giving and Support) | | |

Reflection

Which 3 areas of my life do I most want to improve in the next 3 months?

What resources do I have now, that I can use to achieve my goals?

How can I be resourceful in getting access to other resources?



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Personal and Business Finances:

What is the status of my personal and business financial position?

| Total Income | Total Expenses | Total Savings | Total Assets | Total Liabilities |
|--------------|----------------|---------------|--------------|-------------------|
| | | | | |
| | | | | |

Financial Focus

My #1 financial priority for the next 3 months is:

One financial habit I will start:

One financial habit I will stop:

Financial Management Gap Analysis:

For each question, rate from 1 (LOW) to 5 (HIGH) and review your scores to identify areas for improvement:

Financial Statements and Records - How confident are you in reading and interpreting your business's income statement, balance sheet, and cash flow statement to make decisions? (Score: _____)

Cash Flow Management - How well do you understand and actively manage your business's cash flow (e.g., forecasting inflows/outflows, planning for seasonal dips, maintaining a cash buffer)? (Score: _____)

Budgeting and Cost Control - How effectively can you create, follow, and adjust a budget for your business, including identifying and controlling unnecessary expenses? (Score: _____)

Pricing and Profitability - How confident are you that your pricing strategy covers all costs, reflects your value, and delivers a healthy profit margin? (Score: _____)

Working Capital and Liquidity - How well do you understand and manage working capital (inventory, receivables, payables) to ensure the business can meet its short-term obligations? (Score: _____)

Funding and Capital Structure - How knowledgeable are you about the different funding options available (e.g., equity, loans, grants, investors) and their impact on ownership, risk, and cash flow? (Score: _____)

Financial Planning and Forecasting - How confident are you in creating financial projections (sales, expenses, profits, and cash needs) for the next 12–36 months to guide your business strategy? (Score: _____)

Tax Planning and Compliance - How well do you understand your tax obligations (income tax, VAT/sales tax, payroll taxes, etc.) and plan ahead to meet them without cash flow strain? (Score: _____)

Performance Monitoring and KPIs - How effectively do you use financial metrics or KPIs (e.g., gross margin, net profit, customer acquisition cost, break-even point) to track business performance and make adjustments? (Score: _____)

Risk Management and Resilience - How prepared are you to identify and manage financial risks (e.g., revenue dips, client non-payment, economic downturns), including having reserves, insurance, or contingency plans? (Score: _____)



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The Year in Review 2025 “How did it go?”

Top 5 Wins – What worked?

Key Lessons – What is the biggest lesson I learnt?

Let it Go List – What will I stop doing or tolerating?

Business Performance Snapshot and Targets

| Metric | End of 2025 Actual | End of 2026 Target | Notes |
|-----------------------------|-----------------------|-----------------------|-------|
| Annual Revenue | | | |
| Annual Profit | | | |
| Number of Active Clients | | | |
| Average Sale / Client Value | | | |
| Email / Subscribers | | | |
| Social / Engagement | | | |

Which metric improved the most in 2025, and why?

Which areas do I need to focus on the most in 2026, and why?



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Personal Reflection and Impact 2025

How did my business positively impact others this year?

Where did I neglect relationships or community?

What kind of business leader did I show up as in 2025?

The Year Ahead 2026 “Visualize, Actualize, Realize”

What am I trying to achieve next year?

What does my ideal future look like, and how vividly can I define the problem I'm solving and the impact I want to create?

What concrete steps, resources, and partnerships must I put in place today to turn this vision into a working reality?

How will I measure whether my vision has truly been achieved, and what lessons will I carry forward to evolve it further?



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My theme for the Year:

Describe a theme for the year ahead and why it matters. For example: impact first, breaking boundaries, momentum over perfection etc.

Top Annual Objectives 2026

(Aim for 12 clear objectives)

What do you want to achieve, why it matters and how you will measure it?

1. _____
2. _____
3. _____
4. _____
5. _____
6. _____
7. _____
8. _____
9. _____
10. _____
11. _____
12. _____

Constraints

My biggest constraints are (time, money, team, skills, systems):

Risks

The biggest risks I face are:

Support

Who can I turn to for support (mentors, team, partners, family, friends, networks)?



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Quarterly Action Plan (from: / / - / /)

Print four (4) copies of this page, then use one for each Quarter of the year. Keep this sheet visible on your desk and refer to it often, especially when planning each month in a quarter!

List your **top 3 goals** (1 per month) **over the next 3 months**:

| Month | Goal | Description | Completed (Y/N) |
|-------|------|-------------|-----------------|
| 1 | | | |
| 2 | | | |
| 3 | | | |

Use the following action plan to breakdown your top **priorities each week** over the next 3 months:

| Month | Weekly Priorities | Deadline |
|---------|-------------------|----------|
| Month 1 | Week 1: | |
| | Week 2: | |
| | Week 3: | |
| | Week 4: | |

| Month | Weekly Priorities | Deadline |
|---------|-------------------|----------|
| Month 2 | Week 1: | |
| | Week 2: | |
| | Week 3: | |
| | Week 4: | |

| Month | Weekly Priorities | Deadline |
|---------|-------------------|----------|
| Month 3 | Week 1: | |
| | Week 2: | |
| | Week 3: | |
| | Week 4: | |



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Weekly Action Plan (from: / / - / /)

Print one (1) copy of this page each week. Keep this sheet visible on your desk and refer to it often, especially when planning your day!

List your **top 5 priorities** (1 per day) **over the next 4 weeks**:

| Week | Daily Priorities | Deadline |
|--------|------------------|----------|
| Week 1 | Day 1: | |
| | Day 2: | |
| | Day 3: | |
| | Day 4: | |
| | Day 5: | |

| Week | Daily Priorities | Deadline |
|--------|------------------|----------|
| Week 2 | Day 1: | |
| | Day 2: | |
| | Day 3: | |
| | Day 4: | |
| | Day 5: | |

| Week | Daily Priorities | Deadline |
|--------|------------------|----------|
| Week 3 | Day 1: | |
| | Day 2: | |
| | Day 3: | |
| | Day 4: | |
| | Day 5: | |

| Week | Daily Priorities | Deadline |
|--------|------------------|----------|
| Week 4 | Day 1: | |
| | Day 2: | |
| | Day 3: | |
| | Day 4: | |
| | Day 5: | |



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Quarter in Review - Challenges and Lessons

Print one (1) copy of this page for each quarter. Revisit and complete the following after each quarter!

Biggest challenge this quarter and what it taught me:

What systems or habits did I build that I want to keep?

What habits or activities do I need to change or stop?

Celebration and Gratitude

How will I celebrate this quarter's effort and progress?

Five People I'm grateful for in my business journey this quarter and why:

1. _____
2. _____
3. _____
4. _____
5. _____

Next Quarter Focus

My main focus areas for the next 3 months will be:

Stay Motivated!

Remember these important Universal Laws and the Power of Your Mind:

- The Law of Belief - If you BELIEVE it then you can ACHIEVE it!
- The Law of Correspondence - "First, WITHIN, then WITHOUT." To have what you want in your life you must first conceive of it IN YOUR MIND.
- The Law of Cause and Effect - The DIRECTION you set in your life will determine your DESTINATION in life.
- The Law of Attraction - You will ATTRACT to yourself those things in your life that are most like yourself. If you are positive, you will attract positive things to your life and vice versa.
- The Law of Substitution - The only way to remove a negative thought from your mind is to replace it with a POSITIVE one.



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Metrics and Scoreboard



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Weekly Habits Tracker – (Tick each day you complete the habit)