

EVOLVE

THE RESTORATION MASTERMIND

The Preloaded Year Planning Toolkit

Five worksheets to map your most profitable year — before it starts.

- ✓ Set your revenue & profit targets for the year
- ✓ Break the year into a quarter-by-quarter plan
- ✓ Build a simple marketing calendar
- ✓ Map the hires that unlock your growth
- ✓ Track it all with a 90-day scorecard

START HERE

YOUR NAME

PLANNING YEAR

COMPANY

Tip: open this PDF in Acrobat or Preview and type directly into every field, then save.

Finish your plan live in St. Petersburg, FL · Oct 7–9, 2026 · therestorationmastermind.com

Annual Revenue & Profit Targets

Start with the number. Everything else in this toolkit works backward from the revenue and profit you commit to this year.

LAST YEAR'S TOTAL REVENUE (\$)

THIS YEAR'S REVENUE TARGET (\$)

TARGET GROSS MARGIN (%)

TARGET NET PROFIT (%)

AVERAGE JOB VALUE (\$)

JOBS NEEDED TO HIT TARGET (#)

MY TOP 3 REVENUE SOURCES / SERVICE LINES THIS YEAR

1.

2.

3.

THE #1 CONSTRAINT HOLDING BACK MY GROWTH RIGHT NOW

Quarter-by-Quarter Execution Plan

A year is too big to execute. Break it into four focused quarters — one dominant priority each — so every 90 days has a clear job to do.

Q1

Jan – Mar

REVENUE TARGET (\$)

SUCCESS METRIC

#1 PRIORITY THIS QUARTER

Q2

Apr – Jun

REVENUE TARGET (\$)

SUCCESS METRIC

#1 PRIORITY THIS QUARTER

Q3

Jul – Sep

REVENUE TARGET (\$)

SUCCESS METRIC

#1 PRIORITY THIS QUARTER

Q4

Oct – Dec

REVENUE TARGET (\$)

SUCCESS METRIC

#1 PRIORITY THIS QUARTER

Marketing Calendar

Leads don't show up by accident. Decide the one focus or campaign that owns each month, and the budget behind it.

ANNUAL MARKETING BUDGET (\$)

TARGET COST PER LEAD (\$)

January

February

March

April

May

June

July

August

September

October

November

December

Hiring Roadmap

Growth stalls when the owner is the bottleneck. Map the roles that unlock your plan — and the signal that tells you it's time to hire.

ROLE / SEAT TO FILL	TARGET HIRE DATE	TRIGGER — WHAT TELLS YOU IT'S TIME	OWNER

90-Day Scorecard

What gets measured gets moved. Pick the handful of numbers that prove the plan is working, set a target for each, and review them weekly.

I WILL REVIEW THIS SCORECARD EVERY (DAY / TIME)

METRIC I'M TRACKING	OWNER	TARGET	CURRENT

Got the plan started? Come finish it in the room.

Evolve Planning Intensive · St. Petersburg, FL · Oct 7–9, 2026