

## Reflect on 2026 and Reset for 2027

**1 October 2026 · STBB Paardevlei, Somerset West · Half day, in person**

This workshop works best when you arrive with your numbers already in front of you. We will be looking at what your business actually earned this year, the real figures rather than how the year felt. Pull them from your accounting software. If you do not use accounting software, work from your bank statements and add up what came in each month.

*What matters is that you arrive with a clear picture of what you earned from January to now, broken down month by month, so that we can see the trend.*

[Here is a spreadsheet](#) to help you if you feel like your stuff is all over the place.

### 1. YOUR INCOME

Pull these from your accounting software, your invoicing tool, or your bank statements.

- ☐ **Annual revenue to date.** Your total income for 2026 so far, as one figure.
- ☐ **Monthly revenue, month by month.** Twelve figures, or nine if you are working to date. This is what shows you your strong months and your lean ones.
- ☐ **Top performing products or services.** Which offers brought in the most income, ranked. Include roughly how much each one earned.

### 2. WHAT IT COST YOU

The aim is to see what you kept, not just what came in.

- ☐ **Cost of sales against income.** What it cost you to deliver the work, set against what you charged for it.
- ☐ **Supplier, associate and collaborator costs.** If you outsource or work with others, bring what you paid them this year. If you sell products, bring your cost of goods instead.
- ☐ **Current subscriptions.** Every recurring tool, platform, membership and licence, with the amount and whether it bills monthly or annually.

- ☐ **BIG Purchases:** Make a note of any big purchases throughout the year. This could be investments, courses, holidays. It could be both business or personal.

### 3. YOUR CLIENTS

No names will be shared with the group. Bring these for your own reflection.

- ☐ **Two clients you would gladly work with again.** The ones who valued the work, paid on time, and made the year better.
- ☐ **Two who were harder work than they were worth.** Those clients you would not take on again, whatever the fee. *(Bet they already came to mind as you read that.)*
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### WHAT TO BRING ON THE DAY

Your figures, printed or on a laptop. A notebook and pen, as much of the work is written by hand. Comfortable clothes and an open mind.

#### *If you get stuck*

If you get stuck or have any questions, please feel free to pop me an email [hello@jadebuckfield.com](mailto:hello@jadebuckfield.com). Remember, [here is the spreadsheet](#) to help you if you need a place to put everything in and feel more organised.