

From Idea to Infrastructure

Roadmap for a Profitable and People Ready 2026

Workshop Resources

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2026 One-Page Business Roadmap Worksheet

Map out the foundational elements of your business. Each section helps you clarify direction, make intentional decisions, and prepare for growth in 2026.

Business Statement: Complete this sentence to define your purpose with clarity.

Example: My company, _____ delivers _____ by helping _____ so they can _____.

Customer Avatar: Identify who your ideal customer is, what they need, and why they choose you.

2026 Priority: Select ONE major focus that will strengthen or transform your business next year.

One System to Build: Choose a system (sales, onboarding, finance, marketing, operations, etc.) that will create consistency and support growth.

Three Tasks to Delegate: List the tasks you must release so you can focus on strategy, leadership, and revenue.

Next Hire: Determine your next support role — employee, contractor, offshore talent, or administrative support and why.

Leadership Habit to Adopt: Identify the leadership action, behavior, or mindset you will practice consistently.

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Ten Keys to Small Business Success Self-Assessment

This checklist serves as a self-assessment tool to ensure your business is built on strong foundational practices. Review each key and identify what needs attention.

Success Area	Description	Not Started	Needs Improvement	Emerging	Strong	Excellent
Admin Operations Support	Do I have adequate support for daily operations?					
Customer Avatar	Do I know exactly who I serve and how?					
Customer Relationships	How well do I maintain and nurture customer connections?					
Customer Reviews	Am I collecting and leveraging testimonials and references?					
Financial Discipline	Are my forecasting, cash flow, and bookkeeping practices strong?					
Learning and Development	Am I investing in my growth as a CEO?					
Mentor Advisor	Do I have paid access to mentoring or advisory support?					
Networking and Community Engagement	Do I actively participate in my business community?					
Technology and Automation	Do I use tools to streamline workflows and boost productivity?					

What actions I will take:

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Systems That Scale Self-Assessment

This tool helps you evaluate the strength of your business systems. Rate each system to determine where you are strong and where to improve.

System	Guiding Question	Not Started	Needs Improvement	Emerging	Strong	Excellent
Communication	Do you have clear, consistent internal and external communication processes?					
Compliance	Are you meeting all regulatory, legal, and policy requirements?					
Data and Measurement	Are you tracking metrics that matter for decision-making?					
Delivery and Operations	Is your workflow efficient, documented, and repeatable?					
Finance	Are your pricing, cash flow, payroll, and bookkeeping systems reliable?					
HR People	Are your hiring, classification, and people processes defined?					
Legal	Do you have contracts, policies, and legal protections in place?					
Marketing	Do you have a consistent marketing rhythm that drives visibility?					
Onboarding	Do new clients or team members receive a smooth, predictable experience?					
Sales CRM	Is your prospect follow-up organized and consistent?					

What actions I will take:

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Leadership Reflection and Planning

Use this card to pause, reflect, and strengthen your leadership. These questions help you stay grounded, intentional, and aligned with the leader you want to be.

What am I learning as a CEO? Reflect on new insights, feedback, or skills gained recently.

What actions I will take:

Leadership Habit for 2026: Choose one behavior or habit to elevate your leadership.

What actions I will take:

How do I want to show up as a leader? Define your presence, tone, and impact.

What actions I will take:

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Tasks to Delegate Worksheet

Use this worksheet to identify tasks you can release to free your time and energy. Delegation supports growth, capacity, and leadership. List tasks that drain your time or could be managed by others. Assign ownership and deadlines.

Task(s)

Why Release It/Them?

Who Should Own It/Them?

By When?
