TEAMSTACKGUIDE · FREE TEMPLATE

Plan 2027: The Team Planning Template

Look back at 2026, set three goals, and walk into January with every project owned, dated, and on a quarterly map.

By TeamStackGuide · Updated October 24, 2026 · 5 pages: how to use it, the blank template, and a filled-in example

How to use it

1. **Block 90 minutes with your team** in December, before the holidays.
2. **Fill it in order:** look back, the one-sentence theme, three goals, the project list, the quarterly map, and the capacity check.
3. **Move the projects into your project tool** the same week, and put the four quarterly review dates on the calendar.

KEY INSIGHT
Every project links to one of your three goals. When a new idea arrives in March, the first question is “which goal does it serve?”

ACTION STEP
Put the 2027 quarter-end reviews on the calendar today: Fridays March 26, June 25, and September 24, plus December 17 (December 31 falls on New Year's Eve).

COMMON MISTAKE
Writing six or seven goals. Three goals your team remembers move further than seven nobody can name.

PRO TIP
Write each goal with its measure and its owner on the same line. “Win two retainer clients · signed retainers · Priya” is a goal; “grow the business” is a wish.

WHAT YOU CAN SKIP
Teams of three or fewer can skip the capacity check. You already know who is doing what.

What's inside

- The 2026 look back: wins, repeat, stop, carry over or drop
- A one-sentence 2027 theme and three goals with measures and owners
- A project list tied to goals, and a Q1–Q4 map
- A capacity check and a weekly, monthly, and quarterly review rhythm
- A filled-in example from a fictional five-person design studio

BLANK TEMPLATE

1. Look back at 2026

Our top wins

One thing to repeat

One thing to stop

Unfinished projects: carry over or drop?

PROJECT	CARRY OVER / DROP	WHY

2. 2027 in one sentence

3. Three goals

#	GOAL (AN OUTCOME)	HOW WE'LL MEASURE IT	OWNER	TARGET DATE
1				
2				
3				

4. Project list

PROJECT	GOAL #	OWNER	START	DUE	QUARTER	DEPENDS ON

5. Quarterly map

Q1 · JAN 1–MAR 31	Q2 · APR 1–JUN 30	Q3 · JUL 1–SEP 30	Q4 · OCT 1–DEC 31

6. Capacity check

Each person's main focus per quarter, plus planned time off.

PERSON	ROLE	Q1	Q2	Q3	Q4

7. Tool check

☐ Our project tool still fits the plan above ☐ We need a change: score the options with the TeamStackGuide Tool-Selection Scorecard

8. Review rhythm

RHYTHM	WHEN	WHAT WE LOOK AT
Weekly	Every Friday, 35 minutes	Weekly review template
Monthly	First Monday of the month, 30 minutes	Project list: status, owners, dates
Quarterly	Fri Mar 26 · Fri Jun 25 · Fri Sep 24 · Fri Dec 17, 2027	Goals: on track, change, or drop

☐ All quarterly reviews are on the calendar ☐ Projects are in our project tool

FILLED-IN EXAMPLE

Example: Ridgeline Studio's Plan 2027

Example only: Ridgeline Studio is a fictional five-person design studio. Names, numbers, and dates are made up to show how a finished plan reads.

Look back at 2026

- *Moved all client work into one project tool in March.*
- *Shipped 11 client sites.*
- *Started a Friday weekly review in August.*

Repeat: *Kickoff checklist that asks for source files on day one.* **Stop:** *Taking rush jobs without moving another deadline.*

PROJECT	CARRY OVER / DROP	WHY
Studio portfolio refresh	*Carry over*	*Finish in Q1*
Podcast idea	*Drop*	*No owner and no goal it serves*

2027 in one sentence

Fewer, bigger client projects, delivered on time.

Three goals

#	GOAL	MEASURE	OWNER	TARGET
1	*Deliver every client project by its agreed date*	*On-time launches / total launches*	*Sam*	*Dec 17, 2027*
2	*Win two retainer clients*	*Signed retainers*	*Priya*	*Jun 25, 2027*
3	*Refresh the studio portfolio*	*New site live with 6 case studies*	*Jordan*	*Mar 26, 2027*

Project list (first four)

PROJECT	GOAL #	OWNER	START	DUE	QUARTER	DEPENDS ON
Portfolio refresh	*3*	*Jordan*	*Jan 4*	*Mar 26*	*Q1*	*Case-study photos*
Retainer offer and pricing	*2*	*Priya*	*Jan 11*	*Feb 26*	*Q1*	*Portfolio refresh*
Delivery checklist v2	*1*	*Sam*	*Feb 1*	*Mar 12*	*Q1*	*None*
Retainer outreach	*2*	*Priya*	*Mar 1*	*Jun 25*	*Q1–Q2*	*Retainer offer*

Capacity check

PERSON	ROLE	Q1	Q2	Q3	Q4
Sam	*Lead designer*	*Delivery checklist*	*Client work*	*Client work*	*Out Aug 9–20*
Priya	*Client lead*	*Retainer offer*	*Retainer outreach*	*Retainer clients*	*Client work*
Jordan	*Designer*	*Portfolio refresh*	*Client work*	*Client work*	*Out Dec 20–31*