

2026 Agency Owner Preparation Checklist

Mission, Vision & Values

- ☐ Revisit and clearly define your mission, vision, and values—why you exist, how you're different, and where you're headed.
- ☐ Ensure these are known and lived across your agency: hiring, onboarding, client onboarding, team meetings, and decision-making.
- ☐ Communicate and celebrate them regularly so they become part of your culture, not window dressing.
- ☐ Outline how you'll roll out or reintroduce them to your team in early 2026.
- ☐ Define milestones to measure progress toward your vision.

New Business (Two-Headed Beast)

1. Existing Clients

- ☐ Identify A, B, and C clients based on value, opportunity, and relationship potential.
- ☐ Create a plan for relationship cultivation (A clients quarterly, B clients 2–3 times per year, C clients annually).
- ☐ Review the 2024 Agency Edge Research Summary on client growth opportunities.
- ☐ Build or refine a system for growing existing accounts rather than simply asking AEs to “sell more.”
- ☐ Schedule 2026 industry events or trade shows where your A clients will be and block them on your calendar now.

2. New Clients

- ☐ Choose or reaffirm your niche—by industry, audience, or problem solved.
- ☐ Use the niche criteria tool to evaluate your best-fit options.
- ☐ Define how your agency will be findable and known for its expertise.
- ☐ Develop a content or thought leadership plan to share your expertise through research, speaking, or writing.
- ☐ Build a repeatable new business system that attracts right-fit clients without relying solely on referrals.

People & Leadership

- ☐ Create or update career pathing for all employees that shows clear professional growth opportunities.
- ☐ Set quarterly growth goals for each team member tied to learning and skill-building.
- ☐ Strengthen team culture and connection, especially if you have a hybrid or remote workforce. Plan in-person gatherings or retreats.
- ☐ Develop a retention plan that makes people want to stay—built around culture, recognition, and opportunity.
- ☐ Increase your personal presence with monthly all-hands meetings, team huddles, and one-on-one recognition.
- ☐ Build a leadership team (two to six people) that runs the business, not just their departments.
- ☐ Equip that team with the authority and responsibility to handle fires before they reach you.

Running the Business

- ☐ Define your key KPIs (such as the 55/25/20 model for AGI, overhead, and profit).
- ☐ Ensure the leadership team understands how to monitor and manage by the numbers.
- ☐ Tie KPIs to employee awareness and incentives so everyone understands their impact.
- ☐ Revisit your financial health targets and ensure alignment for profitability in 2026.
- ☐ Schedule quarterly reviews to track and adjust against KPIs.

Client Love

- ☐ Build genuine business-owner-to-business-leader relationships with top clients.
- ☐ Schedule relationship-building touchpoints now for 2026.
- ☐ Use industry events as opportunities for strategic, non-sales conversations.
- ☐ Focus these meetings on insight, curiosity, and helping clients think bigger—not selling.
- ☐ Position yourself as a trusted confidant and resource, not a vendor.

Fire Management

- ☐ Limit your own firefighting to no more than five percent of your time.
- ☐ Train your leadership team to handle internal and client issues proactively.
- ☐ Build clear response protocols for client or staff crises.
- ☐ Empower your team to make decisions aligned with your values and goals.

Calendar & Execution

- ☐ Block key 2026 industry events, leadership meetings, and client touchpoints now.
- ☐ Plan a January all-team kickoff to reenergize around mission, vision, and values.
- ☐ Use the final quarter of 2025 to finalize strategic direction, train your leadership team, and communicate clearly what's ahead.
- ☐ Begin 2026 with clarity, alignment, and momentum.