

YOUR ULTIMATE 2026 PLANNING GUIDE

(with worksheet)

It's almost 2026! (when the hell did that happen?)

The start of a new year is the perfect time to sharpen your focus and set yourself up for success. Whether you're a seasoned recruiter or just getting started, creating a clear, actionable plan for your desk is honestly one of the most important things you can do.

In this planning guide, I'll unpack a simple, no-nonsense way to map out your recruitment year. By the end, you'll know exactly what you're chasing and how to get there.

Why Goal Setting & Planning Matters?

Before diving into the nitty-gritty, let's talk about the importance of setting goals. Goals aren't just numbers on a page or lofty aspirations. They're your roadmap for the year ahead. But here's the thing: it's not enough to know what you want to achieve. You need to understand why you're doing it.

- **Clarity of Purpose:** Knowing your "why" gives you a reason to push through challenges and stay focused when distractions arise. For example, are you aiming to build financial security, create work-life balance, or achieve a personal milestone?
- **Direction:** Without clear goals, it's easy to get caught up in day-to-day busyness without moving the needle on what truly matters.
- **Motivation:** Your "why" fuels your enthusiasm and helps you power through tough months or tough calls.
- **Accountability:** Goals hold you accountable. They provide a measure of success and give you a benchmark to track progress.

Take a moment to reflect: What do I want to achieve this year, and why is it important to me? Write it down and keep it somewhere visible - make a vision board & whack it on your wall if that works for you! This exercise isn't just motivational - it's essential for long-term success.

The Simplest Way to Plan Your Recruitment Year

Recruitment doesn't have to be complicated, but we recruiters LOVE to overcomplicate it.

But let's be crazy and keep it simple.

Grab a pen, check out the worksheet page attached (or create a spreadsheet if you're fancy), and let's break it down:

STEP 1: Define your annual target.

Write down your desired billing target for 2026. This figure will look different for everyone but should be ambitious yet achievable. For example:

- Target: \$600,000 in billings

STEP 2: Calculate the number of placements needed.

Divide your annual target by your average fee. For instance:

Average fee: \$20,000

$\$600,000 \div \$20,000 = 30$ placements

Now you have your magic number: 30 placements / year.

STEP 3: Break It Down by Month

Divide your annual placement goal by 12 to get a monthly target. For example:

- $30 \text{ placements} \div 12 \text{ months} = 2.5 \text{ placements per month}$

Doesn't that feel more manageable already? Instead of stressing about a big number, you've got a clear, bite-sized goal.

Now if you know your numbers (which I hope you do), you can break this down into how many briefs & interviews secured each week. Which then obviously breaks down into BD calls & headhunts / candidates sourced.

Focus on your KEY Clients

To achieve your goals, focus on where the money is: your key clients. This is where most recruiters falter. Let's redefine "client":

- A client isn't just someone you chat with occasionally. A client is someone who pays your invoices.
- Make a list of your top 5-8 clients from the past year. These are the ones who are easy to work with, pay on time, and consistently give you business.

Next, predict how many placements you can realistically achieve with each client this year. For example:

- Client A: 4 placements
- Client B: 3 placements
- Client C: 2 placements

Break these down further by quarter. For example, Client A might provide:

- Q1: 1 placement
- Q2: 1 placement
- Q3: 1 placement
- Q4: 1 placement

This exercise gives you a crystal-clear picture of where your billings will come from and whether you need to fill any gaps with new business.

Your roadmap to recruitment success in 2026

Here's what your plan will look like by the end of this process:

1. Your Annual Target: What you're aiming to bill.
2. Your Placements: How many you need to hit your target.
3. Your Key Clients: Who will help you get there.
4. Quarterly and Monthly Goals: A clear roadmap broken into manageable chunks.

Now, you can confidently walk into each month knowing what you're chasing. Plus, when you communicate this plan to your clients, you'll be seen as proactive, strategic, and a true partner in their success

Connect your billings to your WHY

So the last part is to go back to WHY you want to achieve all of the above & really land an emotional connection to your goals. I want you to do the following:

1. Close your eyes.
2. Imagine yourself at the end of 2026 & you have ACHIEVED what you set out to achieve.
3. What are you doing? Who are you with? How do you feel? What has achieving your goals allowed you to do for yourself, your family, your friends & your life this year?
4. Focus on these thoughts & feelings for a few minutes whilst breathing deeply.
5. Cement these feelings in your mind.

You've now connected your goals & what you want with emotions. And yes, it sounds airy fairy, but I am telling you, if you do this often, it WORKS.

Now use the worksheet & go get it!

Recruitment success isn't about luck - it's about clarity, focus, and action. By defining your goals, understanding your "why," and creating a practical plan, you can make 2026 your best year yet.

If you have any questions or want help refining your plan, reach out! And stay tuned for the next episode of The Lone Recruiter, where we'll dive into creating a monthly framework to track and smash your goals.

Let's make 2026 the year of strategic success. Cheers to your best year yet!

The Lone Recruiter: 2026 Desk Planning Workbook

Clarity, consistency, cashflow. Don't leave your year to chance.

Before you write a single target... Why are you doing this?

What's the point of smashing it this year?

Your WHY for 2026:

1. Your Billing Target

Pick a number that scares you slightly (goals should always scare you slightly, that means they will challenge you), but doesn't require you to collapse by the end of the year.

My 2026 billing target: _____

My average fee: _____

Formula: Target ÷ Avg Fee = Placements Needed

Number of placements needed in 2026: _____

2. Monthly Target

Placements for the year: _____

Monthly placement target: _____

Month	Target	Actual	Hit?	Difference +/-
Jan			<input type="checkbox"/>	
Feb			<input type="checkbox"/>	
Mar			<input type="checkbox"/>	
Apr			<input type="checkbox"/>	
May			<input type="checkbox"/>	
Jun			<input type="checkbox"/>	
Jul			<input type="checkbox"/>	
Aug			<input type="checkbox"/>	
Sep			<input type="checkbox"/>	
Oct			<input type="checkbox"/>	
Nov			<input type="checkbox"/>	
Dec			<input type="checkbox"/>	

End of year result:

Placements for the year: _____

Dollar value: _____

Difference from target (+/-): _____

3. Your key clients:

Clients aren't nice chats. A client is someone who's paid your invoice.

Build your year around them.

Client Name	2025 Spend	2026 Potential	Q1	Q2	Q3	Q4

Placements accounted for: _____

Gap to fill with new business: _____

4. New business gap plan

If there's a gap, don't panic - plan it.

Niches to target: _____

Target companies: _____

Key roles: _____

Daily / Weekly BD commitment: _____

Message/angle: _____

5. Anchor to your WHY

If you don't give your goals emotion, you won't give them effort.

If I hit my 2026 goals, my life will look like:

The people impacted:

How I'll feel at the end of 2026:

What hitting this goal proves to me:

What hitting this goal does for me:

6. My non-negotiables (these are examples, add your own)

Health:

- ☐ Sleep target: _____
- ☐ Weekly training sessions: _____
- ☐ Alcohol boundaries: _____
- ☐ Mental health practices: _____
- ☐ _____
- ☐ _____
- ☐ _____
- ☐ _____
- ☐ _____

Performance Habits:

- ☐ Morning routine _____
- ☐ Daily pipeline review _____
- ☐ Weekly BD block _____
- ☐ Admin block _____
- ☐ End-of-day reset _____
- ☐ _____
- ☐ _____
- ☐ _____
- ☐ _____
- ☐ _____

State Management:

- ☐ What I need to stay at my best: _____
- ☐ Early warning signs I'm cooked: _____
- ☐ Backup plan when I'm off-track: _____
- ☐ _____
- ☐ _____
- ☐ _____

That's it.

Hopefully that has helped you create some clarity around what your 2026 looks like.

If you want to go deeper with this - this is exactly what we will be covering (and so much more) at LAUNCH: The Mindset of a Million Dollar Biller Series in February with the RCSA.

The whole aim of the half-day event is to help you become a more successful recruiter through finding the right mindset, motivation & resilience.

If you're reading this on an online browser, [CLICK HERE](#) for tickets.

Otherwise, this is the link:

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