The planning cycle: before the next strategy is written

Sample brief, anonymized. Built for a peer heading into a multi-year strategy with annual planning stacked behind it; strong team, standing business, no crisis in sight.

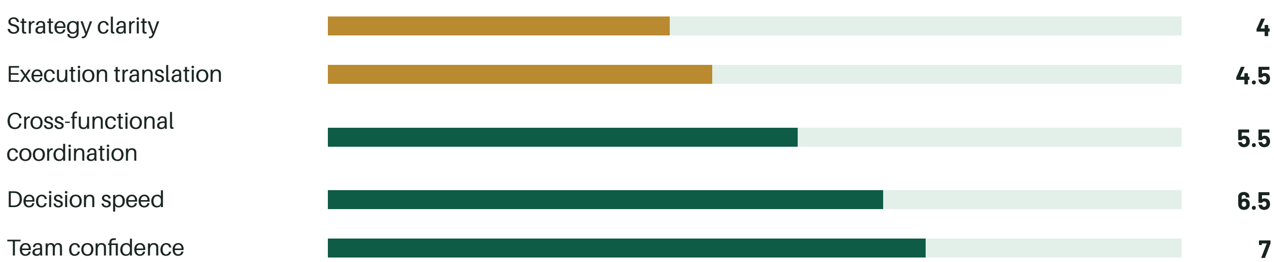
BRIEF **2 PAGES** · 4 MINUTE READ FOR **CEOS AND THE EXECUTIVE WHO OWNS THE PLANNING CALENDAR** AUGUST 2026

IF YOU ONLY READ THIS PARAGRAPH

The strategic questions are already on a list somewhere, and this team will answer them well. The risk is the process: capacity estimates that miss every cycle, initiatives stacked on the same people, and one document quietly asked to answer every open question in the company. A plan written past capacity is drift scheduled in advance. So start before the writing does: measure where execution actually stands, publish what the document will answer, and put an outside hand on the room.

ALIGNMENT PULSE (SELF-REPORTED, 0 TO 10)

Five dimensions, 0 to 10, from one senior vantage point. The scores start the conversation. The transcripts underneath them are the finding.



The pre-plan shape: confidence high, because the hard choices have not been made yet, and clarity lowest, because teams are answering strategic questions mid-execution. The gap between 7 and 4 is the brief.

THE THREE FINDINGS THAT SHAPE A PLANNING CYCLE

Two strong signals and one emerging pattern. A strong signal was directly observed and repeatedly evidenced. An emerging pattern has multiple indicators that are not yet triangulated.

STRONG SIGNAL

1. Capacity misses every cycle

Leadership teams at this stage know their strategic questions and answer them well. What misses is the estimate of who has room to carry the answers: the same group ends up doing everything at once, and there is no slack in the system to absorb the error.

STRONG SIGNAL

2. The document has no contract

One seat needs the strategy: the few commitments that steer decisions. Another needs the plan: what next year looks like for their team. Ask one document to be both and half the room calls it thin, half calls it bloated, and the argument is really about what the document is for.

EMERGING PATTERN

3. The plan becomes the container

A new strategy is the easiest place to file every open need in the company. Each addition looks reasonable on its own; the sum commits the organization to more than it can sequence, and the overrun surfaces later under the name of poor execution.

WHAT IS ACTUALLY CAUSING THIS

Planning runs on ambition and memory: the new goals, and last cycle's plan as the template. The input it rarely gets is a current read of execution: where work actually pools against today's priorities, which teams have room, where the last plan quietly overran. And so team leads spend the cycle answering big strategic questions while carrying their day jobs, and neither gets done well.

RUN THE AUDIT AS THE INPUT

The same two-week read, pointed forward. Its findings become the planning room's first exhibit.

The Strategy Alignment Audit usually reads drift against a plan you already have. Run ahead of the cycle, it inverts: the read becomes the plan's first input. Two weeks, fixed fee, about 20 minutes from each of one or two senior leaders, and what comes back is the picture planning never has: where execution stands, where capacity pools, what the organization can actually sequence next. The readout then does double duty as the room's common language.

Weeks 1 to 2

The two-week read, run as an input. Findings labeled by confidence, capacity read included.

Week 3

Readout with the executive team. The findings become shared language before a single planning argument starts.

Week 4

The kickoff workshop. Half reviews what the read found; half sets the process: what the document answers, who decides what, the sequence capacity can carry.

THE OUTSIDE HAND

The executive who owns the plan cannot also referee the room that produces it. An outside facilitator returns the owner to the argument as a participant, and carries the one thing the room keeps asking for: how organizations of this size typically land these calls, and what each landing costs. The audit informs the plan; the choices stay yours. We never set the WHAT.

THE MOVE

Before the calendar fills: book the two-week read so it lands ahead of the first planning session, publish a one-page contract for what the strategy document will answer and what it will send elsewhere, and name the outside hand for the kickoff room.

What this brief is: a directional signal from one senior vantage point, labeled by confidence. It is not a diagnosis.

Findings carry confidence labels. A strong signal was directly observed and repeatedly evidenced. An emerging pattern has multiple indicators that are not yet triangulated. A hypothesis to validate is plausible and explicitly unproven. You can act on a labeled finding because you know how much weight it bears.

The Comprehensive Audit (6 to 10 executive interviews) validates these signals against your own leadership team and produces the shared operating model. TL Partners Strategy Alignment Audit, instrumented by **Alyn**. Related reading: **Anatomy of an Audit**. Full library at **tlpartners.biz/library**.

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