



# Annual Strategic Planning Guide

A clear framework to simplify your success

**2026 Edition**

# BEFORE WE START...

## A LETTER FROM OUR FOUNDER

Dear Business Leader,

Planning for the year ahead is like mapping a journey. It's not just about numbers — it's about setting direction, sparking new ideas, and aligning your team.

This guide gives you a clear, step-by-step process to build a plan that motivates, sets boundaries, and keeps your company moving forward.

This isn't a template to copy — it's a flexible framework you can adapt.

We hope this helps you simplify your planning. Remember, Nuve is here to support you and help make success easier.



**Jhonatan Aldama, CPA**  
Founder + CEO, Nuve

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**Short on time?**  
Try the **2-Week  
Lite Sprint**

# INTRODUCTION

## Why Strategic Planning Matters

- Sets **clear direction**
- Defines **measurable goals**
- Ensures **wise use of resources**
- Helps you **adapt to change**
- Aligns your **team and decisions**
- Creates a **competitive edge**

## How to Use This Guide

1. Read each section.
2. Complete the matching page in the **Workbook**.
3. Use the sample agendas to run your meetings.
4. Choose either the **3-Month Plan** or the **Lite Sprint**.

If this is your first time doing strategic planning, don't skip the examples — they'll show you what a good answer looks like.

## Download the Workbook

Track progress and document your plan with the **Strategic Planning Workbook**.

[Click here to download](#)

# FULL PLAN (3 MONTHS) PLANNING TIMELINE

Ideal for larger teams or businesses wanting a deeper process

## Month 1

- **Kick-Off Meeting (1–2 hrs):** Introduce process, roles, and schedule.
- **Environmental Analysis Meeting (2–3 hrs):** SWOT + internal/external review.

## Month 2

- **Vision, Mission & Values Meeting (2–3 hrs):** Define or refine VMV.
- **Goal Setting Meeting (2–3 hrs):** Set long- and short-term goals, assign KPIs.

## Month 3

- **Strategy Development Meeting (3–4 hrs):** Choose focus areas and initiatives.
- **Implementation Plan Meeting (2–3 hrs):** Define action steps, owners, due dates.
- **Organization Alignment Meeting (1–2 hrs):** Confirm communication and team buy-in.

## Ongoing

- **Monitoring & Evaluation Meetings (Monthly, 1–2 hrs):** Track progress and adjust.

# LITE SPRINT (2 WEEKS) PLANNING TIMELINE

Ideal for small businesses or teams with limited time

- **Day 1:** Kick-Off + VMV refresh (90m)
- **Day 3:** SWOT + top 3 trends (2h)
- **Day 5:** Goals + KPIs (2h)
- **Day 7:** Choose 3 initiatives (90m)
- **Day 10:** Assign owners, due dates, draft "Plan on a Page" (60m)
- **Day 14:** Confirm communication & set review rhythm (45m)

# SELECTING LEADERS & PARTICIPANTS

**Leader:** Usually the CEO/owner. Guides the process.

**Participants:** 3–7 people is ideal. Include finance, sales, operations, HR, advisors.

**Tips:**

- Fewer = faster, but enough perspectives matter.
- The CEO is a natural choice for leading the strategic planning due to their role in driving the business's vision.

**Rule:** Everyone comes prepared, stays engaged, and commits to next steps.

# ENVIRONMENTAL ANALYSIS

**Purpose:** Understand your current position before setting goals.

## Meeting (2–3 hrs)

- Review last year's wins/losses.
- Brainstorm internal strengths & weaknesses.
- Discuss external opportunities & threats.
- Fill out SWOT table in Workbook.

## How To Do It:

1. Limit to 3–5 items per box.
2. Be honest — weaknesses are just opportunities to improve.
3. Focus on what's most impactful.

## SWOT Categories & Examples:

- Strengths (internal): Loyal clients, strong cash reserves, unique product.
- Weaknesses (internal): Weak marketing, outdated tech, limited staff capacity.
- Opportunities (external): Market growth, new tech, competitor exiting.
- Threats (external): Rising costs, new competitor, regulation changes.



**Output:** Completed SWOT in Workbook.

# VISION, MISSION & VALUES (VMV)

**Purpose:** Define where you're going and why.

## Meeting (2–3 hrs)

- Create or refine your **Vision, Mission, and Values**.

## How To Do It:

- **Vision (5–10 years):** What success looks like.
  - Tesla: "Drive the world's transition to sustainable energy."
  - Airbnb: "A world where anyone can belong anywhere."
- **Mission (Why we exist):** Who you serve + how.
  - Nike: "Bring inspiration and innovation to every athlete."
  - Starbucks: "Nurture the limitless possibilities of human connection."
- **Values (Principles):** 3–5 behaviors that guide decisions.
  - Google: "Focus on the user and all else will follow."

**Tip:** Keep it short: Vision 1 sentence, Mission 1–2 sentences, Values 3–5 words/phrases.



**Output:** Clear VMV statements in Workbook.

# GOAL SETTING

**Purpose:** Break VMV into outcomes.

## Meeting (2–3 hrs)

- Set 2-3 **long-term goals** (2–3 years).
- Break into 3-6 **short-term goals** (this year).
- Each goal = SMART (Specific, Measurable, Achievable, Relevant, Time-bound).

## Examples:

- Long-term: “Expand to 3 new markets by 2028.”
- Short-term: “Open 1 new location by Dec 2026 with SIM run rate.”

## How to Do It:

1. Review VMV.
2. Write long-term goals.
3. Break into short-term goals for this year.
4. Assign KPIs now — not later.



**Output:** Long- and short-term goals in Workbook.

# OBJECTIVES & KEY RESULTS (OKRS)

**Purpose:** Make goals measurable and trackable.

## Meeting (1–2 hrs)

- Write **Objectives** (inspiring, qualitative).
- Add **3–5 Key Results** (measurable, quantitative).
- Label each KR as leading (predictive) or lagging (results).

## Example:

- **Objective:** Improve cash flow
- **Key Results:**
  - Reduce receivables from 60 → 45 days
  - Increase cash reserve by \$50K
  - 100% of invoices sent within 24 hrs
  - Leading vs. lagging example:
    - Leading KR: "Send invoices within 24 hrs"
    - Lagging KR: "Reduce DSO from 60 → 45 days"



**Output:** Objective table in Workbook.

# STRATEGY DEVELOPMENT

**Purpose:** Decide how to reach goals.

## Meeting (3–4 hrs)

- Review SWOT + OKRs.
- Brainstorm strategies.
- Select 2–3 focus areas that move the needle most.

## Examples:

- Market & sales: Launch referral program
- Product/service: Add recurring service package
- Operations: Automate billing system
- Finance: Reduce expenses by 10%

**Tip:** Pick no more than 3 strategies per Objective. Too many = no focus.



**Output:** Strategy list tied to objectives on Workbook.

# IMPLEMENTATION PLAN

**Purpose:** Turn strategy into action.

## Meeting (2–3 hrs)

For each strategy:

- Define action steps
- Assign owner
- Set due dates
- Note dependencies/risks
- Add budget/capacity needs

## Example Action Step:

- Action: “Select new billing software by March 15”
- Owner: CFO
- Due Date: 3/15/26



**Output:** Detailed plan in Workbook.

# ORGANIZATION ALIGNMENT

**Purpose:** Get buy-in and clarity.

## **Meeting (1–2 hrs)**

- Share plan with team
- Translate goals into team/individual goals
- Identify training/tools needed
- Create communication plan (when updates are shared)

## **Communication example:**

- Monthly email update from CEO
- Quarterly town hall with results



# MONITORING & EVALUATION

**Purpose:** Keep the plan alive.

## Monthly Review (60 min)

1. Review KPIs/Key Results
2. Celebrate wins
3. Identify roadblocks
4. Adjust owners/dates
5. Confirm next steps

## Quarterly Review (90 min)

- Reassess assumptions
- Update priorities
- Set next 90-day plan

**Tools:** Dashboard (Fathom/Jirav), scorecard, review template.

### Tips:

- Document decisions in one place (scorecard or shared doc) so the plan evolves instead of getting forgotten.
- Put all monthly and quarterly reviews on the calendar at the start of the year. Treat them as non-negotiable.

# PLAN ON A PAGE

**Summarize your entire plan in one view:**

- Vision, Mission, Values (1 line each)
- Top 3–5 Objectives
- 6–10 Key Results
- 3–5 Initiatives
- Owners + dates

**Print or share digitally. Post it where everyone can see.**

**Example:**

## Plan on a Page (Nuve Template)

Vision | Mission | Values  
(1–2 lines each)

Top 3–5 Objectives  
(Qualitative focus areas)

6–10 Key Results (Measurable targets)  
Example: Increase margin 45% → 55%

3–5 Strategic Initiatives  
(Projects or big actions)

Owners & Deadlines  
(Assign responsibility)

# CONCLUSION & NEXT STEPS



Your plan only works if you act.

## **Next Steps:**

- Finalize action plans
- Assign responsibilities
- Share “Plan on a Page”
- Schedule monthly & quarterly reviews
- Celebrate wins

**Tip:** Don't let perfect be the enemy of progress. Start simple, improve each year.

# How Nuve Can Help Beyond This Guide

We partner with businesses year-round to keep their plans on track:



## **Bookkeeping & Financial Clarity**

- Accurate monthly books in QuickBooks Online
- Clean financial reports and dashboards
- Payroll and expense management



## **CFO & Advisory Services**

- Monthly/quarterly strategy reviews
- Budgeting & forecasting
- Variance analysis and KPI tracking
- Support for funding, growth, and big decisions



## **Tax Strategy & Compliance**

- Business & individual tax returns
- Year-round tax planning
- IRS compliance, notices, and audit support
- Proactive strategies to reduce tax liability



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**LEARN MORE:**

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