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2027 STRATEGIC PLANNING GUIDE

5 Things to Nail Down Before Your 2027 Plan

A practical checklist for leadership teams who want a plan still driving results in December, not sitting in a shared folder by June.

300+
Successful engagements

85%
Repeat engagements

20+
Years facilitating leadership teams

1 of <65
Certified Master Facilitators worldwide

Inside: the five decisions, warning signs, real examples, a 5-point readiness check, and a planning worksheet for your session.

BEFORE YOU BEGIN

Why most 2027 plans will stall by June

Most 2027 plans will get built the same way last year's plan was built. A day or two offsite. A whiteboard full of ideas. A slide deck everyone agrees on. Then January arrives.

Client work, hiring, and daily fires take over. The plan gets opened twice after the offsite. By June, the team looks up and wonders why the year looks so much like the last one.

The plans still working in December are not smarter. Their teams settled five decisions before anyone left the room. Each missing decision creates a predictable failure.

If you skip this	Here is what happens by June
1. Fewer priorities	Effort spreads across too many goals, and nothing finishes.
2. A named owner	Everyone assumes someone else is driving the work.
3. A check-in date	The first review gets pushed, then skipped.
4. A definition of done	Teams report "progress" with no result to show.
5. A barrier plan	The first setback stalls the priority for good.

How to use this guide

BEFORE THE SESSION

Share this guide with your leadership team. Everyone arrives with the same standard for a finished plan.

DURING THE SESSION

Work through the five steps in order. Capture each decision live on the worksheet on page 9.

BEFORE YOU FINALIZE

Run the 5-Point Check on page 8. Fix every "no" before anyone signs off.

Built on the Acrux method

Discover	Align	Decide	Execute
Clarify your goals, challenges, and top 2027 result before the session.	Step 1. Agree on the few priorities worth the organization's attention.	Steps 2 and 4. Set owners and a clear finish line for each priority.	Steps 3 and 5. Lock check-ins and plan your response to barriers.

STEP ONE

01 Fewer priorities, not more

THE PRINCIPLE

If everything on the list is a priority, nothing is.

Planning sessions reward addition. Every leader arrives with a goal for their area, and adding one more item feels easier than a hard conversation. The result is a list of ten or more priorities competing for the same people, budget, and hours.

When the list runs long, teams quietly pick their own favorites. The organization ends up moving in ten directions at once. A short list does the opposite. When two requests collide in March, every employee knows which one wins.

WARNING SIGNS

- Your priority list runs past five items.
- Each department added one "must-have" to keep the peace.
- Nobody has said no to anything yet.

DO THIS IN THE ROOM

1. List every proposed priority.
2. Rank each one by impact on your top 2027 result.
3. Keep the top three to five.
4. Read the cut list out loud so everyone hears the decision.

A three-question filter

Run every proposed priority through these questions. Anything with a "no" drops to the cut list.

- Does this move our single most important 2027 result?
- Do we have the people and budget to finish this year?
- Will we regret skipping this in December?

EXAMPLE

A 60-person professional services firm arrived at its offsite with 14 proposed priorities. After ranking, the team kept four: client retention, a pricing update, two senior hires, and a CRM rollout. The other ten went on a "Not in 2027" list, read aloud before the session closed. Nobody spent Q1 half-working on projects the firm had already deprioritized.

ASK YOUR TEAM

If we achieve only these priorities, will 2027 count as a win?

STEP TWO

02 A named owner for every priority

THE PRINCIPLE

A department is not an owner. "The leadership team" is not an owner. One person is.

When a priority belongs to "marketing" or "the leadership team," nobody wakes up responsible for the next step. Meetings end with agreement and no action. Months later, each leader believed someone else was driving.

A single owner changes the question from "Is anyone working on this?" to "What's your update?" The owner does not do all the work. The owner makes sure the work happens, flags problems early, and reports progress.

WHAT THE OWNER DOES

- Drives the work and assigns tasks.
- Reports status at every check-in.
- Raises barriers before they grow.
- Asks for decisions or resources when stuck.

WARNING SIGNS

- The owner column lists a team, two names, or "TBD."
- People nod at a priority, and nobody raises a hand.
- The owner has no authority over the people doing the work.

Weak owner vs. strong owner

Priority	Weak	Strong
Grow enterprise pipeline	Sales team	Maria Lopez, VP of Sales
Cut month-end close time	Ops and Finance	David Chen, Controller
Launch client portal	Leadership team	Priya Nair, Head of Client Success

Do this in the room

1. Assign one name to each priority.
2. Have each owner accept the role out loud, in front of the group.
3. Confirm each owner has the authority to pull the resources they need.

ASK YOUR TEAM

Does each owner know what they will report at the first check-in?

STEP THREE

03 A check-in date, already on the calendar

THE PRINCIPLE

"Sometime in Q2" never arrives.

Energy fades fast after an offsite. The first review gets described as "sometime in Q2," and Q2 fills with other meetings. Nobody wants to schedule a meeting about a plan nobody has touched. So nobody does.

Scheduled accountability drives follow-through. In a Dominican University study led by Dr. Gail Matthews, 76% of participants who wrote down their goals and sent weekly progress reports achieved or made strong progress on them. Only 43% of participants who kept their goals in their heads did the same.

The lesson for your plan: lock the date before the busy season starts.

Recommended cadence

Rhythm	Length	Purpose
Monthly	30 to 45 min	Each owner reports status against the definition of done.
Quarterly	90 min	Full review. Re-rank priorities, adjust targets, reassign if needed.
Mid-year	Half day	Reset session. Decide what to stop, keep, or add for H2.

A SIMPLE CHECK-IN AGENDA

1. Status from each owner against done.
2. Barriers hit and responses used.
3. Decisions the group needs to make.
4. Next steps and the next date.

DO THIS IN THE ROOM

1. Pick the first review date before the session ends.
2. Send the calendar invite from the room.
3. Set the recurring cadence for the full year.

ASK YOUR TEAM

Who owns the agenda for the first check-in?

STEP FOUR

04 A clear, agreed-on definition of "done"

THE PRINCIPLE

"In progress" and "underway" do not tell you a priority is finished.

"Improve retention" sounds clear in the room. Six months later, one leader says retention improved because two large clients renewed. Another says the priority failed because overall churn stayed flat. Without an agreed finish line, the team argues about results instead of acting on them.

A strong definition of done has four parts:

METRIC	TARGET	DEADLINE	SOURCE
What you will measure.	The number you need to hit.	The date for the result.	Where the number comes from.

Weak vs. strong definitions

Weak	Strong
Improve customer retention.	Raise 12-month customer retention from 78% to 85% by December 31, 2027, measured in the CRM renewal report.
Launch new onboarding.	New onboarding live for all clients by March 31, with 90% of new clients completing onboarding within 30 days.
Build a stronger leadership bench.	Two internal candidates ready for director roles by Q4, confirmed through a documented development plan and a CEO review.

Use this formula: [Metric] from [baseline] to [target] by [date], measured in [source].

Do this in the room

1. Write one sentence per priority describing the finished state.
2. Include a metric, a date, and a source.
3. Get agreement from every leader before the session ends.

ASK YOUR TEAM

If we met on December 31, would everyone agree on whether we finished?

STEP FIVE

05 The barriers most likely to get in the way

THE PRINCIPLE

Name what will derail each priority before the problem shows up.

Every plan assumes a steady year. Real years bring resignations, budget freezes, client emergencies, and dependencies stuck in another team's backlog. Most priorities do not fail in one dramatic moment. They stall after the first obstacle, because nobody agreed on the response and waiting feels safer than acting.

Naming barriers in advance turns a crisis into a decision the team already made. Everyone knows the trigger, the owner, and the next move.

COMMON BARRIERS

- A key person leaves or takes extended leave.
- Budget gets cut mid-year.
- Urgent client work crowds out project time.
- A dependency on another team stalls.
- The owner's regular workload expands.

WARNING SIGNS

- The risk discussion got skipped because time ran out.
- The plan assumes steady staffing, budget, and demand.
- Nobody knows who decides when a priority slips.

Example barrier plan: CRM rollout

Barrier	Trigger	Agreed response
IT lead leaves mid-project	Resignation notice	Owner brings in vendor implementation support within 2 weeks.
Sales team skips adoption	Under 70% weekly logins by month 2	VP of Sales runs all pipeline reviews from CRM data only.
Budget freeze in Q3	Finance cuts discretionary spend	Phase 2 integrations move to Q1 2028. Core rollout stays funded.

Use this template: If [barrier] happens, [owner] will [response] within [timeframe].

ASK YOUR TEAM

What are the two or three things most likely to stop each priority, and what will we do when they happen?

READINESS CHECK

Before you finalize: the 5-Point Check

Run this check at the end of your planning session. Answer honestly. Every "no" is a gap to close before sign-off.

- [ ] **Fewer priorities.** We have five or fewer priorities, and we said no to the rest out loud. YES / NO
- [ ] **Named owners.** Every priority has one named person accountable for results. YES / NO
- [ ] **Check-in date.** Our first review sits on the calendar, with a recurring cadence set. YES / NO
- [ ] **Definition of done.** Each priority has a written finish line with a metric, date, and source. YES / NO
- [ ] **Barrier plan.** Each priority lists its top barriers and our agreed response. YES / NO

5 yes

Your plan is ready to finalize. Lock the date for your first check-in and go.

3 to 4 yes

You are close. Fix the gaps before sign-off, not after the first missed deadline.

0 to 2 yes

Your plan is on track to repeat 2026. Reopen the session before you finalize.

> **Nail these five down before you finalize the plan, and you'll spend a lot less of 2027 wondering why nothing changed.**

PLANNING WORKSHEET

Capture your decisions live

Fill this in during your session. When every box has an answer, your plan is ready for the 5-Point Check.

	Priority	Owner	Done means...	Top barriers and response
1				
2				
3				
4				
5				

FIRST CHECK-IN DATE

RECURRING CADENCE

NOT IN 2027 (OUR CUT LIST)

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NEXT STEP

Want a second pair of eyes on your 2027 plan?

A plan looks complete from the inside. An outside review shows where the gaps hide before they cost you a quarter.

Book a call with Acrux Consulting. Bring your draft plan, and walk away knowing:

- Which priorities to keep and which to cut.
- Where ownership and finish lines need work.
- Which barriers your team has not planned for yet.

Book Your Planning Call

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ABOUT ACRUX CONSULTING

For over two decades, Acrux Consulting has helped leadership teams across government, healthcare, education, nonprofit, and corporate sectors turn strategy into action. Acrux leads strategic planning sessions, leadership retreats, executive coaching, and meeting facilitation built on one approach: Discover, Align, Decide, Execute.