



Strategic Planning and Your Accountant

Why ideation and numbers belong in different phases --
and how to get the most out of both



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Two important conversations -- not the same conversation

Dear Colleague,

Strategic planning and accounting are two of the most important conversations you can have about your business. They're also two very different conversations.

When they get conflated -- when strategic planning starts and ends with last year's P&L and a forecast spreadsheet -- the result tends to be a slightly better version of what was already done. That's optimisation, not strategy.

The point of this paper isn't to sideline accountants from strategic planning. Accountants are essential to it. The point is that ideation and validation are different phases of the work, and treating them that way produces a much stronger plan.

Strategy starts with the future

If strategy was about the past, we'd still be riding horses and sending smoke signals. Apple would still be making just computers. IBM would still be producing only mainframes. GE would still be producing just light bulbs.

Strategy is about what you want to become next -- not what you've already been. And what you want to be may look nothing like the past.

The risk in starting strategy from financial reports is that the conversation naturally anchors on existing product lines and incremental improvements. The reports do their job perfectly -- they describe what's been -- but that's not the same as a vision for what's next.

This is also why we don't open strategic planning sessions with a SWOT analysis. SWOT grounds the conversation in the current state. Useful later. Constraining as a starting point.

Strategy starts with ideas -- numbers prove them

Apple didn't dream up the iPod, iTunes, iPhone, and iPad by looking at numbers. The idea came first. The numbers came in to test it, model it, and prove it could be built profitably.

The order matters. Ideas first. Numbers second.

A strategic plan is usually one or two pages of bold direction. The tactical plans, forecasts, and spreadsheets that flow from it might run for fifty pages -- and that's where your accountant brings real horsepower. Modelling the plan, stress-testing the numbers, structuring the tax position, finding the cost levers -- this is exactly the work accountants do brilliantly.

The work doesn't lead the strategy. It follows it -- and gives the strategy a fighting chance of actually working.

Strategy is built on different questions

If you want different results, you have to ask different questions. And if strategic planning starts with last year's numbers, the natural question is: 'How much more can we do of the same thing this year?'

That isn't the wrong question -- it's just the wrong starting question. It produces incremental answers when what's wanted is strategic ones.

The questions that produce strategic ideas have a different shape:

- What would be a dream come true for the people in our target market -- or a new market we haven't entered?
- What trends could we take advantage of before our competitors do?
- What are our competitors great at? Weak at? How do we use that?
- What's our core driving force, and how should that shape this year?
- What strong right turn might leap-frog us in front of our competitors?

These questions don't start in spreadsheets. They start in the room. The accountant comes in once the ideas are formed, and the numbers do their proper job -- testing, costing, modelling, validating.

Where Resolve fits in

We facilitate the ideation phase -- the strategic conversation. We bring the framework, the questions, and the outside perspective that lets a director or business owner think bigger than last year's P&L.

Once the strategic direction is clear, we hand it back to your accountant for the work they do best: validating the numbers, modelling the cashflow, structuring the tax position, and stress-testing the assumptions.

Two phases. Two rooms. One plan -- much stronger than either part alone.

What this means for accountants

If you're an accountant reading this, the message isn't that you can't or shouldn't be involved in strategic planning. Many of the strongest strategic minds we work with are accountants -- usually those who've consciously built a strategic facilitation practice alongside the compliance and advisory work.

For most others, the working pattern that produces the best plan looks like this:

- A separate strategic facilitation session, run by someone whose primary skill is strategic ideation.
- A handover to the accountant for forecasting, modelling, tax structure, and execution support.
- Ongoing collaboration as the plan unfolds and the numbers tell you what's working.

Done well, the accountant is more central to the success of the plan, not less. The numbers still own the back half. The ideation just gets to breathe first.

A working pattern that produces stronger plans

If you're a business owner:

Do your strategic ideation first, with someone whose focus is on questions, ideas, and direction. Then take the output to your accountant to model, validate, and structure.

If you're an accountant:

Bring this approach to the directors you work with. Position yourself as the validator and execution partner -- and bring in a facilitator for the ideation phase. The plan will be stronger, your role in delivering it will be clearer, and the relationship gets deeper.

If your accountant also runs strategic facilitation:

Some do, and they're brilliant at it. Just be honest about which hat is being worn at any given moment -- ideation and validation are different muscles, even when the same person can do both.

Three principles to remember

Whatever pattern you choose, three things consistently produce stronger strategic plans:

- Focus on the future, not the past.
- Focus on ideas first, then numbers -- in that order.
- Ask different questions, not similar ones.

Get those three right and the plan tends to write itself.

The Nature of Our Role

Resolve Business Solutions provides administrative support, coordination, and acts as your point of contact. We facilitate strategic conversations, but we are not licensed to provide financial, legal, or investment advice -- where that's needed for your matter, we coordinate the right specialist practitioners (accountants, solicitors, business advisers) around you.

We work alongside accountants as referral partners, not in competition with them. The accountant remains central to the financial, tax, and execution side of the plan.

Strategy and accounting aren't competing disciplines -- they're sequential ones. The plan starts with ideas. The numbers prove it. Done in that order, the accountant is more essential to the outcome, not less.

— Resolve Business Solutions -- Strategic Facilitation and Coordination

Next Steps

Colleague, if you're putting together a strategic plan for the year ahead -- or you're an accountant whose clients would benefit from a separate facilitation session before the numbers go in -- we'd be glad to talk it through.

Whenever you're ready, you can:

- Reply to this email
- Call us directly on 0499 499 899
- Email us at advisor@resolve.net.au

We work alongside accountants, not around them. The strongest plans come out of the partnership.