

Strategic Planning Insights: Common Questions Answered

Organizations beginning a strategic planning process often have many of the same questions. From determining the right timeline and participant mix to maintaining momentum after the plan is complete, understanding what to expect can help create a smoother and more effective planning experience.

The questions below reflect many of the conversations we have with association leaders as they prepare for or navigate strategic planning. While every organization is unique, these insights provide a helpful starting point for understanding the process and the decisions that shape a successful strategic plan.

Getting Started with Strategic Planning How structure, format, and alignment shape the process.

How long should strategic planning actually take?

Typically, we recommend planning for about six months to complete the strategic planning process, followed by a 90-day implementation check-in to assess progress, address questions, and help maintain momentum.

That said, every organization is different. We've worked with clients who completed the process in just a few months, while others spread the work over the course of a year. We can also accommodate pauses in the timeline if your organization needs to temporarily put the process on hold due to holidays, summer schedules, leadership transitions, budget cycles, or other organizational priorities.

The right timeline is one that allows for meaningful engagement, thoughtful decision making, and sufficient time for stakeholder input without losing momentum. We work with each client to develop a schedule that aligns with their goals, capacity, and key organizational milestones.

Do we really need an environmental scan?

Not every strategic planning process requires a formal environmental scan, but every organization benefits from gathering input before setting priorities. An environmental scan helps leaders move beyond assumptions by collecting perspectives, identifying strengths, surfacing challenges, and recognizing emerging opportunities.

There are many ways to gather this information. At Event Garde, we often administer a structured stakeholder survey designed specifically to inform the strategic planning process. Organizations may also already have valuable sources of information, such as employee engagement surveys, annual reports, impact reports, market research, or member feedback.

The key is to collect data that is relevant to your strategic planning goals rather than simply gather more data for the sake of it. The environmental scan also helps build buy-in because stakeholders know their voices were considered. Current, meaningful information creates a stronger foundation for decision-making and helps ensure your strategic priorities reflect the organization's current reality rather than the perspectives of only a few individuals.

How many people should be involved?

Strategic planning is most effective when the right people are engaged at the right points in the process. Different phases call for different levels of participation.

We typically begin with a virtual kickoff session involving about 6 participants, including key staff, board leaders, and executive committee members.

Next is the environmental scan, which is often the broadest phase of engagement. This may include your full membership or other stakeholder groups, potentially reaching hundreds or even thousands of participants through surveys and other feedback opportunities.

For the virtual stakeholder orientation and in-person strategic planning session, we generally recommend 20 to 30 participants. However, we've successfully facilitated planning sessions with as few as 15 participants and as many as 150. We'll work with your organization to determine the right size based on your goals and desired outcomes.

As the process shifts into focused implementation planning, we typically engage a smaller group of 12 to 15 staff members, volunteer leaders, and other key stakeholders responsible for carrying the plan forward.

Finally, the 90-day implementation check-in brings the process back to a smaller group of about 6 participants to review progress, address challenges, and identify any adjustments needed to keep implementation on track.

The ideal number of participants depends on your organization's size, structure, and objectives. We'll help you identify the right mix of voices to ensure the process is both inclusive and productive.

For a deeper dive into participant recommendations and why they matter, check out our blog post, [The Magic Numbers Behind Great Strategic Planning](#).

Process and Format

Building the right foundation before you start.

Can strategic planning be done virtually?

Absolutely. Many components of our strategic planning process are already designed to take place virtually, including the stakeholder kickoff, environmental scan activities, and focused implementation sessions.

For the collaborative planning sessions, we use virtual whiteboard platforms such as Miro or Google Slides to recreate the interactive experience of our in-person sticky walls. Whenever possible, we work within platforms your team already knows. If a new platform is needed, we build in time to orient participants so everyone feels comfortable before the planning work begins.

One of the biggest differences is pacing. While an in-person strategic planning workshop can often be completed in a full day, virtual sessions require a different approach. To reduce screen fatigue and encourage meaningful participation, we typically divide the work into two or three shorter sessions held over multiple days.

Although the format looks different, the outcomes are the same. With thoughtful facilitation and intentional design, virtual strategic planning can be just as engaging, collaborative, and effective as an in-person experience.

What if leadership can't agree on decisions?

It's not uncommon for leaders to have different perspectives, and healthy discussion is an important part of the strategic planning process. Our role is to create a structured, collaborative environment where those differences can be explored productively.

We do a great deal of work upfront to establish shared expectations and build trust. Through the kickoff session, stakeholder orientation, and ongoing communication, we answer key questions, clarify roles, and ensure participants understand the purpose of the process and how decisions will be made.

During facilitated sessions, we use a variety of proven techniques to encourage productive dialogue and help the group move toward consensus. This includes establishing community agreements, creating space for every voice to be heard, asking thoughtful questions, and guiding conversations back to shared priorities when discussions become stuck.

While complete agreement on every issue isn't always possible, our goal is to help the group reach decisions that participants can support and move forward with together. By focusing on the organization's mission, vision, and long-term success, we help leadership build alignment and leave the process with a shared commitment to the strategic plan.

What's the biggest mistake organizations make?

One of the biggest misconceptions is that strategic planning can be "outsourced" to a

consultant. While Event Garde guides the process, facilitates conversations, and provides structure and expertise, a successful strategic plan is built in partnership with our clients.

The organization's leadership and stakeholders bring the knowledge, context, and decisions that shape the plan. Our role is to create the conditions for meaningful collaboration and help the group move from ideas to action.

At the beginning of every engagement, we clearly outline the shared responsibilities between Event Garde and the client. Having a mutual understanding of who is responsible for what helps set expectations, keeps communication aligned, supports transparency, and keeps the project moving forward. It also creates accountability on both sides, ensuring the strategic planning process remains collaborative, efficient, and ultimately more successful.

Implementation and Momentum

Where most strategic plans actually break down.

How do we keep momentum after launch?

Momentum doesn't happen automatically. It has to be intentionally built into the implementation process.

Organizations that make the most progress establish clear ownership for each initiative, break strategic priorities into manageable action steps, regularly review progress, celebrate successes, and adjust course as needed. They create a consistent rhythm of accountability that keeps the plan visible and relevant rather than letting it sit on a shelf.

It's also important to remember that implementation isn't about checking every box each quarter. It's about maintaining momentum, continuing to move the work forward, and making steady progress over time. Progress, not perfection, is what drives lasting results.

That's one of the reasons we include a 90-day implementation check-in. This session gives your team an opportunity to celebrate wins, work through challenges, answer questions, and make any necessary adjustments so implementation continues with confidence and focus.

What causes plans to lose traction after completion?

The most common reason strategic plans lose traction is that organizations don't have a clear plan for implementation. Without defined ownership, accountability, and regular check-ins, day-to-day priorities quickly take over. Teams often leave the planning process energized, but without an implementation lead or project management structure to keep the work moving, momentum fades and the strategic plan gradually becomes a document on the shelf.

Successful implementation requires more than assigning tasks. Organizations need clear

ownership, realistic timelines, a way to track progress, and regular check-in opportunities to review what's working, address barriers, and adjust as needed. Building these practices into the planning process from the beginning greatly increases the likelihood that the plan will lead to meaningful action and measurable results.

What should we do if our organization expects an extended period of low capacity, limited resources, or significant change? Should we push through or pause?

Every organization goes through seasons when time, budget, or staff capacity are stretched thin. The key is to be intentional rather than trying to push forward at full speed simply because the plan says you should.

If you know a period of reduced capacity is coming, it may make sense to temporarily scale back implementation, focus on a few high-impact priorities, or adjust your timeline. Strategic plans should provide direction, not create unnecessary pressure. It's better to make steady, meaningful progress on a handful of initiatives than to spread your team too thin and lose momentum altogether.

That said, we generally don't recommend putting the plan on hold entirely unless circumstances truly require it. Even during challenging periods, maintaining a regular cadence of check-ins, celebrating small wins, and revisiting priorities can help keep the strategy alive until your organization has the capacity to accelerate again.

A strategic plan should be a living document that adapts as your organization evolves. Success isn't measured by sticking rigidly to the original timeline. It's measured by continuing to make thoughtful progress toward your long-term goals, even if the pace changes along the way.

Ready to Start the Conversation?

Every organization approaches strategic planning from a different place. Whether you're beginning to think about your next plan, looking to refresh an existing strategy, or exploring facilitation options, we're happy to answer questions and talk through what might work best for your organization.

If you'd like to learn more about Event Garde's strategic planning process or schedule a conversation, we'd love to connect.

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