

# BEYOND THE PLAN

## RETHINKING STRATEGIC PLANNING FOR REAL IMPACT

Tuesday, May 20, 2025  
10 - 11 AM PT / 1 - 2 PM ET

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## LOGISTICS

- We're scheduled to be together for the next 60 minutes
- We do not have a formal break scheduled during this presentation
- Take care of your needs and those in your care
- We encourage you to silence the things that ding, ring and buzz
- Use technology to help keep you in the "room" today
- We will make all slides available to you following the presentation
- 1 CAE credit is available for participating in the live program only



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## WAYS TO PARTICIPATE ON THE ZOOM WEBINAR PLATFORM

- **Q+A:** Enter questions and engage with the facilitators via the Q+A function.
- **Chat:** You're welcome to communicate with other attendees via chat.
- **Reactions:** Utilize "Reactions" as a non-verbal communication strategy.
- **Captions:** Captions are enabled should you wish to use them.
- **Session Recording Notice:** This session is being recorded. Please refrain from sharing confidential information.
- **AI Notetaker:** If you are using an AI notetaker, please make sure it's set to not share afterwards.

## TODAY'S AIMS

### RATIONAL AIMS

- Understand how Event Garde's strategic planning process differs from traditional approaches and why that matters.
- Leave with practical strategies and tools to strengthen your own planning processes, from design to implementation.

### EXPERIENTIAL AIMS

- Feel inspired to think differently about strategic planning as a dynamic, inclusive, and values-driven journey.
- Experience a sense of connection and possibility as you explore real-world stories and practical takeaways you can adapt to your own context.

## AGENDA

## 1 ) OPENING & CASE STUDY

## 4 TOOLS & TECHNIQUES

## 2 ) CURRENT CHALLENGES

## 5 ) FINAL TAKEAWAYS

### 3 ) OUR PROCESS

## 6 Q&A & CLOSING

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## TODAY'S PRESENTERS



**AARON WOŁOWIEC**

he/him

Founder & President



**DILHARA MUTHUKUDA**

she/her

Director, Facilitation  
Services

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# CASE STUDY IN ACTION



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## CASE STUDY: NATIONAL ORGANIZATION FOR RESEARCH DEVELOPMENT (NORDP)



### BACKGROUND

Rapid growth created competing priorities



### CHALLENGE

Lacked alignment and a shared path forward



### OUR APPROACH

Inclusive and tailored facilitation, grounded in stakeholder voices



### OUTCOME

Clear roadmap, renewed energy, and practical implementation steps



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# THE NEED FOR A NEW APPROACH



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## WHY STRATEGIC PLANNING NEEDS TO EVOLVE

### STRATEGIC PLANS OFTEN FALL SHORT

- Top-down decisions and silos
- Overwhelming or vague goals
- Lack of buy-in, ownership or follow-through

### TODAY'S ENVIRONMENT REQUIRES:

- Collaborative, inclusive decision-making
- Clear, focused, achievable goals
- Shared accountability and consistent follow-through



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## THE EVENT GARDE PROCESS

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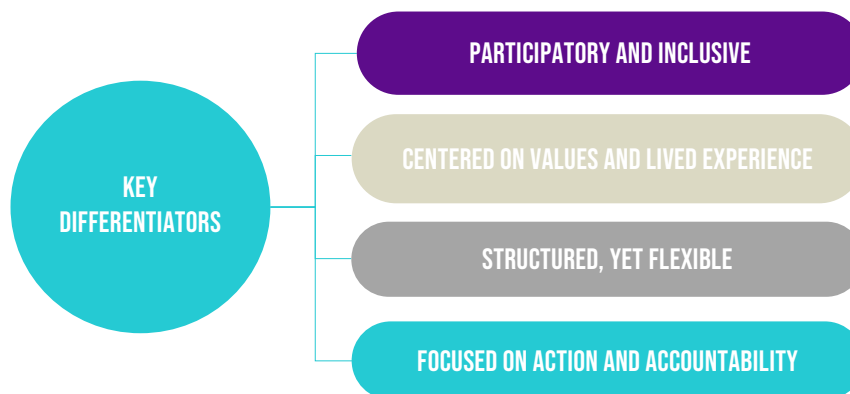
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## EVENT GARDE'S FIVE-PART PROCESS



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## WHAT SETS THIS APPROACH APART



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# TOOLS & TECHNIQUES



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## KEY TOOLS & TECHNIQUES



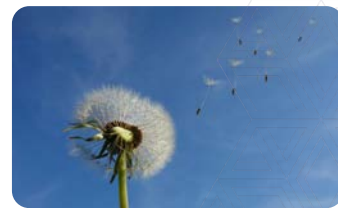
### VISUAL & PARTICIPATORY TOOLS

We use tools like sticky walls and virtual whiteboards to visually organize group thinking and ensure that every voice is seen, heard, and reflected in the final plan.



### ENVIRONMENTAL SCAN

Our environmental scan gathers stakeholder input across past, present, and future lenses to ground the planning process in current realities and emerging opportunities.



### UNDERLYING CONTRADICTIONS

This exercise uncovers the root causes and cultural patterns blocking progress—naming what's getting in the way so strategy can directly address it.



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## KEY TOOLS & TECHNIQUES



### 90-DAY IMPLEMENTATION SPRINTS

We guide teams in developing 90-day action plans that break big goals into manageable steps, align daily work with strategic priorities, and build momentum.



### STAKEHOLDER MAPPING

We help clients identify and engage a broad range of internal and external voices to promote inclusivity and ensure diverse perspectives shape the strategy.



### IN-PERSON VS. VIRTUAL FACILITATION

Whether in-person or virtual, our planning experiences are intentionally designed for equity, accessibility, and full participation, using format-specific tools to maximize engagement.

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## CUSTOMIZATION

Every process is tailored for the needs of the organization.



ORGANIZATIONAL CULTURE



CAPACITY AND TIMELINE



VIRTUAL VS. IN-PERSON

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# FINAL TAKEAWAYS



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## PRACTICAL TIPS FOR MAXIMUM IMPACT



### START WITH READINESS

Ensure your team is aligned on purpose, expectations, and capacity before beginning. A shared commitment to the process lays the foundation for success.



### ENGAGE DIVERSE VOICES

Broaden who's in the room. Involving people across roles and backgrounds builds buy-in and surfaces perspectives that lead to better strategies. Stakeholder mapping is helpful.



### DON'T SKIP THE CONTRADICTIONS

Uncovering the barriers and tensions that block progress is essential. This often-missed phase makes the strategy more honest and more likely to succeed.



### ALIGN PLANNING & IMPLEMENTATION

A strategic plan only matters if it gets used. Design implementation tools, like 90-day sprints and accountability structures, right from the start.



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# CLOSING + Q&A

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**DOWNLOAD THE  
WHITE PAPER**

[bit.ly/EGspwhitepaper](https://bit.ly/EGspwhitepaper)



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# REFLECTION:

**WHAT 1 IDEA FROM THIS PRESENTATION WILL YOU TAKE WITH YOU?**

- What will have the lightest lift, but the biggest impact?
- What additional resource do you need to explore?
- What conversations do you need to have with colleagues?

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# LET'S STAY CONNECTED!

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