

BEYOND THE PLAN: NAVIGATING COMMON STRATEGIC PLANNING PAIN POINTS

Tuesday, July 21, 2026
10 - 11 AM PT / 1 - 2 PM ET



1

TODAY'S PRESENTERS



DILHARA MUTHUKUDA

DIRECTOR,
FACILITATION SERVICES



LINDSAY THOMAS

DIRECTOR,
CLIENT ENGAGEMENT



2

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



EVENT  GARDE

3

WAYS TO PARTICIPATE ON THE ZOOM PLATFORM

- **Chat:** Feel free to connect with other attendees via chat and submit questions to the presenters.
- **Reactions:** Use reactions to communicate non-verbally.
- **Captions:** Captions are available — turn them on anytime.
- **Recording notice:** This session is being recorded. Please avoid sharing confidential information.
- **AI notetaker:** Please refrain from using an AI notetaker during this session.

EVENT  GARDE

4

TODAY'S AIMS



BEFORE THE PLAN

Discover how organizational readiness and engaging the right stakeholders lay the foundation for strategic planning success.



DURING THE PROCESS

Learn how strong communication and intentional pacing keep strategic planning on track from start to finish.



AFTER THE PLAN

Explore how accountability and implementation strategies help sustain momentum long after the plan is complete.

AGENDA

1

WELCOME & FRAMING

Why strategic planning feels harder than expected

4

AFTER THE PLAN

Why momentum fades and plans struggle to move into implementation

2

BEFORE THE PLAN

Readiness, capacity, and stakeholder alignment challenges

5

WHAT CLIENTS ASK MOST

Rapid-fire answers to the most common strategic planning questions

3

DURING THE PROCESS

Communication breakdowns, pacing concerns, and process missteps

6

Q&A AND REFLECTION

Key takeaways, questions, and next steps



7

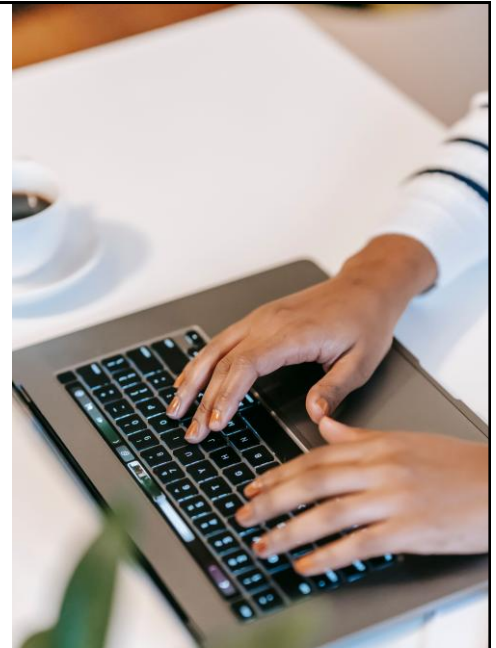


8

RESPOND IN THE CHAT

WHAT STAGE OF STRATEGIC PLANNING FEELS HARDEST FOR YOUR ORGANIZATION?

1. Getting started
2. Stakeholder engagement
3. Creating the plan
4. Implementation
5. Accountability/follow-through



EVENT  GARDE

9

BEFORE THE PLAN

THE PROBLEMS OFTEN START BEFORE PLANNING EVEN BEGINS

EVENT  GARDE

10

ORGANIZATIONAL READINESS & CAPACITY

PITFALLS — WHAT GOES WRONG

Assumed readiness, limited staff capacity, overly optimistic timelines, unclear roles, coordination gaps

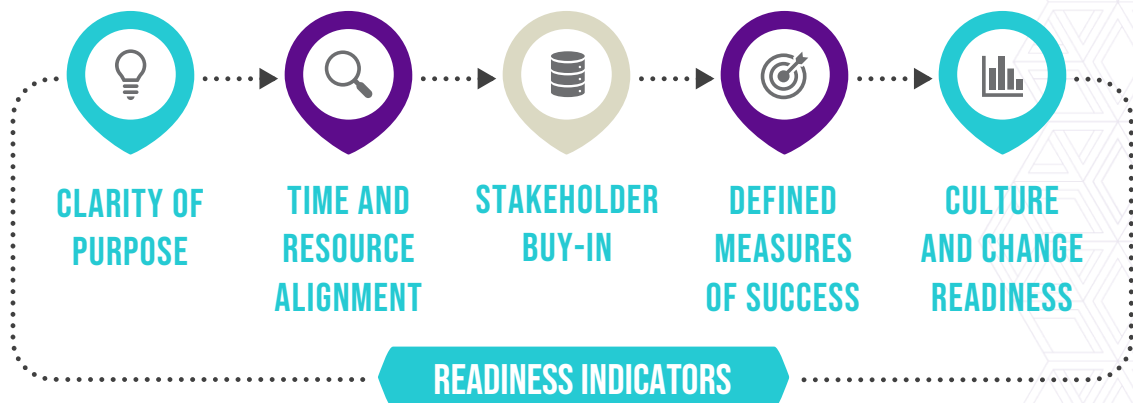
EARLY SIGNALS — HOW YOU KNOW IT'S HAPPENING

Early delays in planning, missed deadlines, slow or stalled decision-making, loss of momentum

TOOLS & RESOURCES — HOW TO PREVENT IT

Whitepaper tools, pre-planning reflection questions, organizational capacity checklist, readiness indicators

MAXIMIZING READINESS



MISSING VOICES & STAKEHOLDER ENGAGEMENT

PITFALLS — WHAT GOES WRONG

Too few perspectives included, leadership dominates discussions, key implementers absent

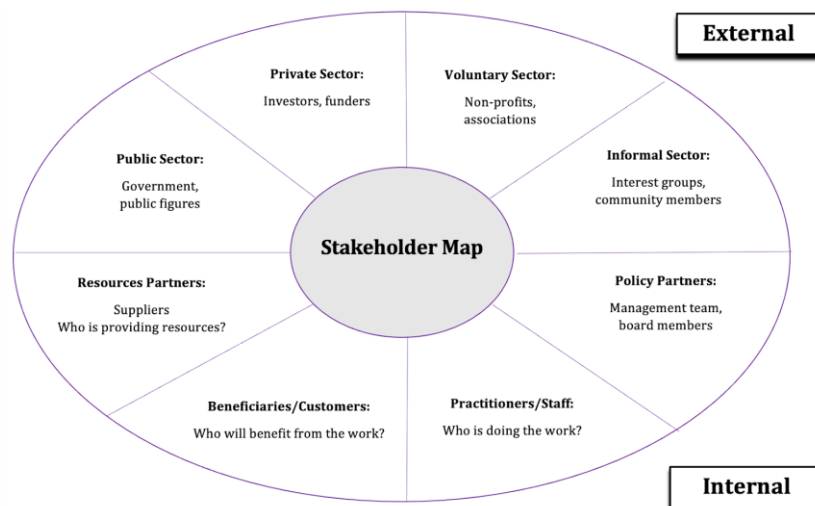
EARLY SIGNALS — HOW YOU KNOW IT'S HAPPENING

Same voices speak repeatedly, resistance emerges after the plan is complete, low ownership or buy-in

TOOLS & RESOURCES — HOW TO PREVENT IT

Stakeholder mapping, Identify Decision Makers, Implementers, and Impacted Groups, participation design by planning phase

STAKEHOLDER MAPPING



DURING THE PROCESS

STRATEGIC PLANNING BREAKS DOWN WHEN ORGANIZATIONS RUSH THE WORK



15

COMMUNICATION & VISIBILITY



PITFALLS — WHAT GOES WRONG

- One-time communication
- Unclear ownership
- No ongoing visibility



EARLY SIGNALS — HOW YOU KNOW IT'S HAPPENING

- Confusion about priorities
- Low engagement post-launch
- Strategy feels disconnected



TOOLS & RESOURCES — HOW TO PREVENT IT

- Onboarding email & division of responsibilities
- Communication checkpoints
- Visibility practices
- Ongoing engagement tools



16

DIVISION OF RESPONSIBILITIES

EVENT GARDE Division of Responsibilities CRITICAL NOTES: Strategic Planning Session: Key Contact: Zoom link when Event Garde hosts: PROJECT TASKS: All tasks and timelines are subject to change. This list provides a representative overview of tasks typically included in a standard strategic plan, outlining the recommended roles and responsibilities for each organization. If you choose to move forward with our proposal, we will tailor a comprehensive plan that aligns with all approved deliverables for your scope of work. Part 1A: Getting Started Event Garde Send initial onboarding email, to include preem logistics for in-person session Refine, finalize, and share key milestone dates and the division of responsibilities Share possible dates for virtual kickoff session ORGANIZATION NAME: Provide feedback on key milestone dates Put together and share a list of the confirmed individuals participating in each step of this process (i.e., names, titles, roles, position with organization, and any other relevant information) Schedule virtual kickoff session Put together and share key statements/documents with EO (e.g., mission, vision statement, professional statement, etc.) Part 1B: Virtual Kickoff Session Event Garde Gather key statements/documents from organization Finalize agenda Share agenda and session logistics with organization Complete session prep Facilitate session Finalize and disseminate notes from the kickoff session ORGANIZATION NAME: Communicate session importance and logistics with key stakeholders	Review session agenda and prepare accordingly Participate in session Review session documentation and follow-up on next steps Part 2A: Barrier Survey Event Garde Provide Stakeholder Mapping resource Survey questions/instrument are drafted by Event Garde in Survey Monkey Event Garde will draft and organization will review, finalize, and disseminate key survey talking points (e.g., how much time it will take, connect to strategic plan, etc.) Disseminate final approved survey to organization stakeholders Event Garde will send meeting reminders during the open window (automated in Survey Monkey) Event Garde will close the survey Event Garde will aggregate the data ORGANIZATION NAME: Decide if EO or organization will send survey Organizational leaders/stakeholders responsible to determine who should receive the survey Organization pulls list of email addresses for everyone who should receive the survey (send to EO) Survey questions/instrument are reviewed, tested, and approved by organization Using talking points drafted by EO, organization will finalize language and communicate with selected stakeholders about purpose, request their participation, etc. Organization will validate aggregated survey responses, once available, and share with key stakeholder group Part 2B: Virtual Stakeholder Consultation Event Garde Send organization availability for this virtual orientation Finalize agenda and divvy up introductory remarks with organization Share agenda and session logistics with organization, including meeting invite with Zoom link Complete session prep Facilitate session Follow-up post-meeting with any next steps/updates ORGANIZATION NAME: Put participants based on Aaron's availability and determine when a majority can participate in virtual stakeholder orientation, share with EO Prep introductory remarks based upon labor division with Aaron Communicate session importance and logistics with key stakeholders
--	--

THE RUSH TO FINISH



PITFALLS— WHAT GOES WRONG

- Unrealistic timelines
- One-day planning expectations
- Skipping preparation and orientation



EARLY SIGNALS — HOW YOU KNOW IT'S HAPPENING

- Pressure to "just get the plan done"
- Decisions made without enough context
- Implementation questions surface after the plan is approved



TOOLS & RESOURCES — HOW TO PREVENT IT

- Realistic planning timelines
- Orientation & environmental scans
- Barrier identification before planning

EXPECTED TIMELINE WITH MILESTONES

Timeline	Description
Month 1:	- Organization key contact onboarding via email (Part 1A) - Refine and finalize key milestone dates and the division of roles/responsibilities (Part 5A)
Month 2:	- Virtual kickoff session with key stakeholders (Part 1B) - Begin environmental scanning activities (Part 2A)
Month 3:	- Complete environmental scanning activities (Part 2A) - Host virtual orientation for key stakeholders (Part 2B)
Month 4:	- Host in-person strategic planning facilitation (Part 3) - Event Garde prepares/delivers primary documentation (Part 5B) - Focused implementation virtual orientation with key stakeholders (Part 4A)
Month 5:	- Organization finishes focused implementation prep - First, two-hour virtual focused implementation session is held (Part 4B)
Month 6:	- Second, two-hour virtual focused implementation session is held (Part 4B) - Event Garde's work concludes
Month 9:	Host virtual check-in for key leadership team (Part 5C)

AFTER THE PLAN

THE BIGGEST CHALLENGE IS SUSTAINING MOMENTUM

WHY PLANS END UP ON THE SHELF

PITFALLS — WHAT GOES WRONG

No ownership structure, no accountability system, plan disconnected from operations

EARLY SIGNALS — HOW YOU KNOW IT'S HAPPENING

Drop-off after 90 days, low follow-through, strategy becomes a document

TOOLS & RESOURCES — HOW TO PREVENT IT

Implementation frameworks, MOCHA, 90-day review structure, tracking tools and scorecards

FOCUSED IMPLEMENTATION TEMPLATES

First-year accomplishments

Strategic Direction		
Current reality	First-year accomplishments	Success Indicators

First-year calendar and assignments

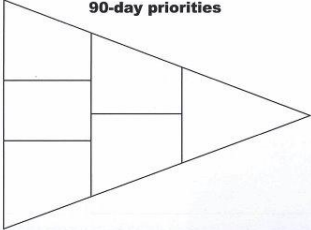
Strategic Direction	Qtr I (Jan-Mar)	Qtr II (Apr-June)	Qtr III (July-Sept)	Qtr IV (Oct-Dec)
→				
→				
→				

90-day implementation steps

Strategic direction		Accomplishment title (what)		
Intent (why)		Start Date: End Date:		
Implementation steps (how)		Who	When	Where
1				
2				
3				
4				
5				
6				

Coordinator Team Mbrs.	Collaborators or Partners	Evaluation Measures	Budget	Next Meeting Date

90-day priorities



WHAT CLIENTS ASK US MOST

COMMON QUESTIONS FROM CLIENT CONVERSATIONS



23

GETTING STARTED WITH STRATEGIC PLANNING

HOW STRUCTURE, FORMAT, AND ALIGNMENT SHAPE THE PROCESS



How long should strategic planning actually take?



Do we really need an environmental scan?



How many people should be involved?



24

PROCESS AND FORMAT

BUILDING THE RIGHT FOUNDATION BEFORE YOU START



Can strategic planning be done virtually?



What if leadership can't agree on decisions?



What's the biggest mistake organizations make?

EVENT  GARDE

25

IMPLEMENTATION AND MOMENTUM

WHERE MOST STRATEGIC PLANS ACTUALLY BREAK DOWN



How do we keep momentum after launch?



What causes plans to lose traction after completion?

EVENT  GARDE

26

Q&A AND REFLECTION

YOUR QUESTIONS AND NEXT STEPS

EVENT  GARDE

27



EVENT  GARDE

28

NEXT STEPS



GET THE WHITE PAPER

All attendees will receive the white paper as soon as it's released



LET'S TALK

Schedule a discovery call to discuss your strategic planning needs

[Contact | Event Garde](#)



EXPLORE RESOURCES

Read related blogs and articles for practical planning tips

[Read More](#)

ADDITIONAL RESOURCES

WHITE PAPER

- [From Sticky Walls to Strategic Wins: Event Garde's Hands-On Approach to Strategic Planning](#)

CASE STUDY

- [National Organization of Research Development Professionals \(NORDP\)](#)

BLOG POSTS

- [Navigating the Planning Landscape: The Four Essential Planning Types & How They Impact Your Organization](#)
- [Maximizing Readiness: Key Factors for Successful Consulting Partnerships](#)
- [A Practical Guide to Stakeholder Mapping & Why It's Important](#)
- [Communication is Key in Strategic Planning](#)
- [From RACI to MOCHA: A Better Framework for Getting Strategic Work Done](#)
- [The Magic Numbers Behind Great Strategic Planning](#)

BOOK

- [The Art of Gathering by Priya Parker](#)

LET'S STAY CONNECTED!

OUTSTANDING QUESTIONS?

Contact us via email:

dilhara@eventgarde.com

lindsay@eventgarde.com

OR FIND EVENT GARDE ON:



[LINKEDIN](#)



[INSTAGRAM](#)



[FACEBOOK](#)

FIND ADDITIONAL RESOURCES AT:

EventGarde.com



EVENT  GARDE

31

EVENT  GARDE

EventGarde.com

32