

Strategic Plans that Actually Work • September 2026

Strategic Plans that Actually Work

Building Organizational and Tactical Roadmaps with Staying Power

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Speaker

Drew Burns - Director of Client Strategy, Advancing Organizational Excellence (AOE)

Drew Burns brings over 15 years of experience collaborating with nonprofit organizations, trade associations, and AEC industry groups. He excels in branding, marketing strategy, strategic planning, and event management, helping organizations align their goals with actionable strategies for long-term success. Prior roles include Executive Director of the Slag Cement Association, Great Lakes Cement Promotion Council and the ACI Center of Excellence for Carbon Neutral Concrete (NEU).

In this role at AOE he collaborates closely with account managers to deliver innovative, customized marketing strategies that align with clients' unique goals. Drew also works directly with clients such as the ACPA Foundation, GLCPC, CP Tech Center, and others; providing strategic guidance and supporting their organizational objectives. Additionally, he leads AOE's strategic planning efforts, facilitating impactful planning sessions that empower clients to chart sustainable growth trajectories.



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Management



Crisis
Communications



Graphic Design &
Fulfillment



Marketing



Meetings & Events
Management



Public & Media
Relations



Social Media
Marketing



Strategic Planning



Video Production



Website Design



Working Genius



Who we work with



Objectives

- Identify the most common reasons strategic plans fail to drive action and how to address them before the planning process begins.
- Apply a structured framework for developing organizational or tactical plans that connect mission, priorities, and measurable outcomes.
- Build stakeholder alignment and clear ownership into your planning process to sustain accountability beyond the initial launch.
- Establish review and adjustment mechanisms that keep your plan responsive to changing member needs and market conditions.



Agenda

- Elements of a Strategic Plan
- The Strategic Planning Process
- Data Collection
 - Identifying KPI's and Metrics
- Facilitation Techniques
- Implementation and Planning Pitfalls
- Plan Examples



What most think of when we talk about strategic planning...

Senior leadership instituting broad goals.



What we are *really* going to talk about

Why is strategic planning important for my organization?

- Future planning – *positioning your organization for growth!*
- Resource allocation
- Staff alignment and collective direction
- Reinforces successful practices that you are already doing
- Enhances market strategy
- Heightens expertise – *making the team more knowledgeable*

A successful strategic plan will evaluate current market conditions, define goals, develop measurable KPIs, and assign actionable tactics that map out the path to implementation.



Components of strategic planning

Always:

- Background, organizational analysis
- Mission/Vision/Strategy/Values
- Goals, measurable objectives, actionable tactics

Items that **can** be included in strategic planning:

- Market/Shareholder Analysis
- Value Proposition – Member Value Analysis
- Succession Plans
- Brand or Operational Audits
- Past Strategic Plans
- Marketing Plans
- Teambuilding Facilitation

Market Research and Data Collection:

- Client surveys/feedback portals
- Interviews
- Focus groups
- SWOT Analysis
- Environmental Scans
- Dashboards (social media, web analytics)
- Historical data, consumer reports



Elements of a strategic plan



Mission Statement: conveys who your organization is, what you value, and your purpose in business.



Vision Statement: outlines what your organization wants to become, how you see your impact on the industries you work in and clients you serve.



Strategy: the overarching approach to business that is unique to your organization that will lead to your success; considering who you work with, how you do it, and what makes you unique.



Goals: are broad, overarching statements that describe a long-term aim of the organization, helping provide direction. A strategic plan will typically have between 3-4 goals.



Objectives: specific, measurable statements that break down goals into more manageable and actionable components. There are usually 3-5 objectives supporting each goal.



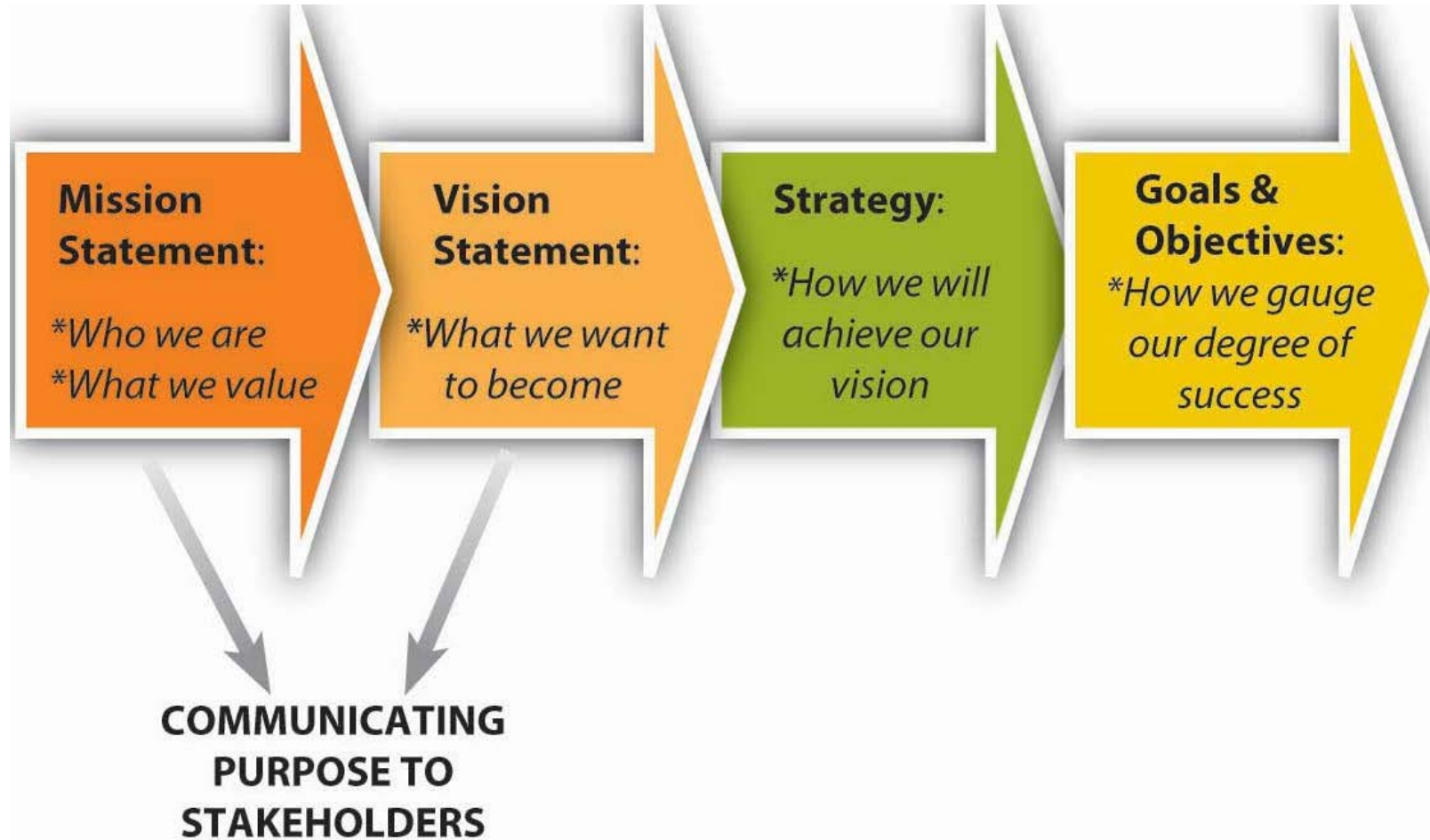
Tactics: specific actions, initiatives, projects, or activities that can help you achieve your goals. It is important to include who is responsible for the tactics in the plan to make it easy to implement.



Metrics: Metrics are the quantitative measures used to track progress toward your goals and objectives. They can be found at any level of the strategic plan and can include timelines, growth measurements, revenue increases, etc. A good metric helps assess the effectiveness of our goals, objectives, and tactics.



Strategic planning



GOALS, OBJECTIVES & TACTICS IN STRATEGY EXECUTION

Goals are broad, overarching statements that describe a long-term goal provide the overall direction.



Objectives are specific, measurable statements that break down goals into more manageable and actionable components. They break goals down into measurable components.



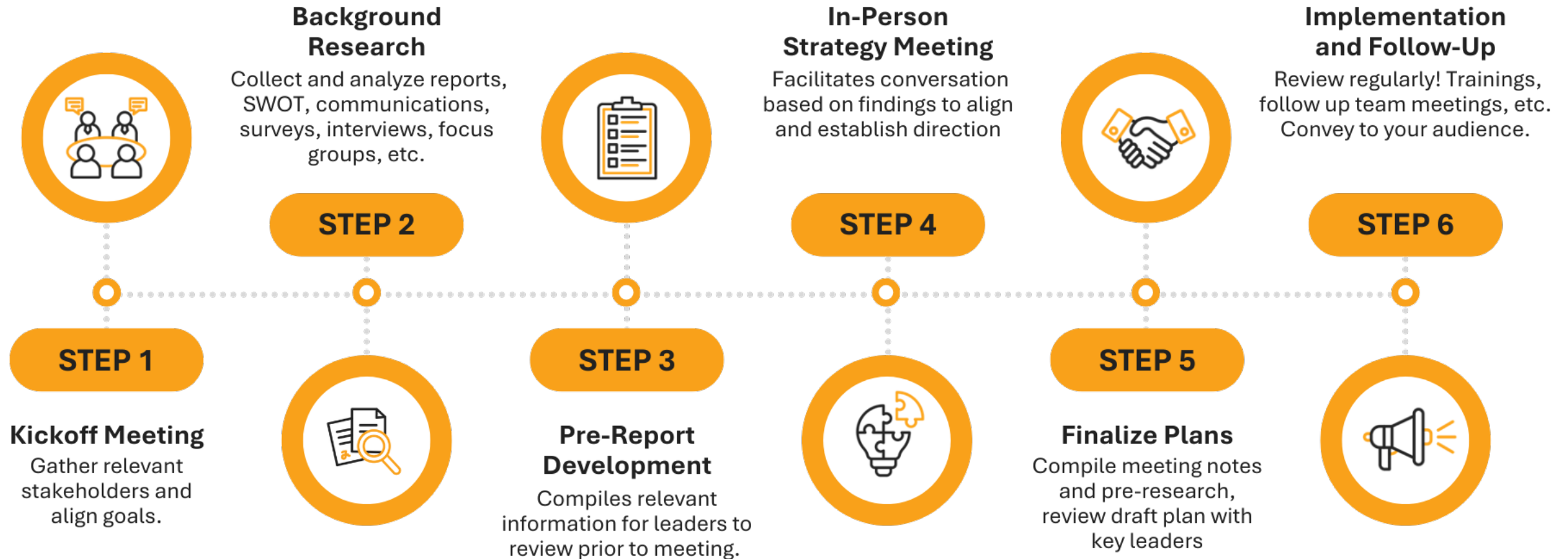
Tactics are the specific actions or steps taken to achieve our objectives. They outline specific initiatives, projects, and activities to progress toward goal



Metrics are quantitative measures used to track progress toward goals and objectives. They help assess the effectiveness of tactics towards achieving goals and objectives.



Steps to building a strategic plan



Who Should Be Involved?

- Think beyond who is “in the room” during step 4
 - Who has insight to the processes, procedures, etc.
 - What insight would be helpful to shape decisions?
 - Who do you need to create buy-in with?
 - Be specific with what you are asking and what information you are trying to gather from different groups.
- Board of Directors
 - Past Presidents
 - Membership Feedback (surveys, focus groups, listening sessions)
 - Membership Segments
 - Committee Chairs
 - Staff/Team
 - Sponsors/Vendors
 - Consultants
 - Industry Leaders



Background and Data Collection

Why Data Collection Matters

- 56% of dissatisfied customers never voice concerns; they leave.
- Businesses leveraging feedback grow 41% faster than competitors.
- Feedback loops help build stronger relationships and drive product improvement.
- 73% of customers switch to competitors after repeated bad experiences.

**The information you collect will
inform the plan you create!**



Background and data collection

1

**Clearly define
your goals**



2

**Identify opportunities
for data collection**



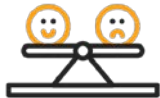
3

**Validate systems
of measurement**



4

Collect data



5

Analyze data



6

Act based on data





Clearly define your goals

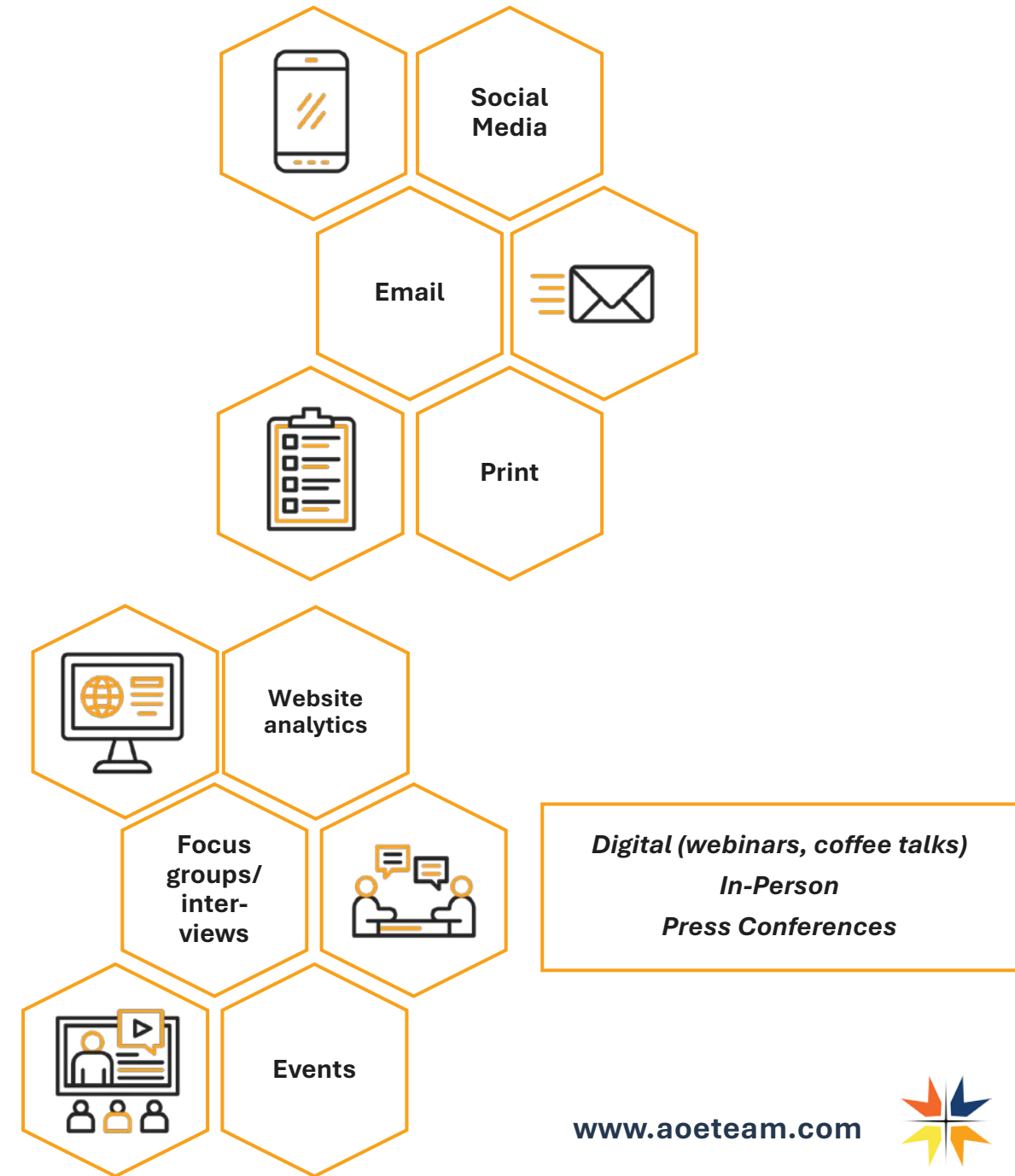
- This should already have happened in your strategic planning kickoff meeting.
- Outline critical questions to answer.
- Identify challenges and valuable information.
- Collaborate with stakeholders to ensure clarity.
- Example questions to ask:
 - "What are the problems we see?"
 - "Why are we doing this project?"
 - "Who should we collect data from?"
 - "Why are we doing this?"





Identify opportunities

- Determine sources of insight:
 - People (surveys, interviews, focus groups).
 - Dashboards (social media, web analytics).
 - Events (implementing paper surveys)
 - Historical data or consumer reports.
- Match methods to goals, resources, and timelines.





Validate systems of measurement

- Ensure data is accurate, reliable, and relevant.
- Avoid collecting unnecessary data.
- Check for:
 - Properly designed surveys or interview questions.
 - Methods aligned with project objectives.
- Eliminate bias in questions and measurements.
- Test!

Tips for Survey Development

- Collect actionable feedback with these criteria:
 - Specificity (e.g., "Checkout crashes" vs. "Your app is bad").
 - Relevant sources (engaged/paying customers).
 - Recurring patterns rather than isolated cases.
 - Impact-driven feedback that aligns with business goals.
 - Contextual details with clear examples.



Validate systems of measurement: Overcoming barriers

Low Response Rates

Solution:

Incentivize participation and simplify surveys

Data Overload

Solution:

Use AI for categorization and analysis, implement shorter surveys with focused goal

Siloed Teams

Solution:

Collaborative tools, shared dashboards, regular presentations

Slow Implementation

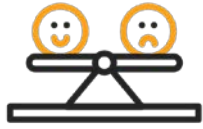
Solution:

Triage urgent feedback, prioritize responses, limit feedback loops while you learn how to implement



USEFUL DATA





Collect data

- Think through implementation.
 - What contact lists do we need? Who monitors? Who sends? Etc.
- Plan timeline for data collection.
- Engage your audience effectively.
 - Send timely reminders for surveys.
 - Use incentives like gift cards or raffles.
- Gather and organize analytics or secondary research.



Analyze data

- Review goals to ensure alignment.
- Identify patterns, trends, pain points, and insights using:
 - Quantitative data (charts, graphs).
 - Qualitative data (storytelling, motivations).
- Segment analysis into:
 - Descriptive, Diagnostic, Predictive, Prescriptive analytics.



Analyzing data: Types of data

Types of Data

- **Descriptive Analytics:** Current and historical trends (what happened).
- **Diagnostic Analytics:** Understanding underlying reasons (why).
- **Predictive Analytics:** Forecasting based on trends (what could happen).
- **Prescriptive Analytics:** Strategies and recommendations (what to do).

Utilizing AI

- AI automates sentiment and thematic analysis across large datasets.
- Predicts emerging challenges before they escalate.
- Provides real-time insights for faster decision-making.
- Many different tools – make sure they are closed source!





Act based on data

- Translate insights into strategies.
- Develop recommendations for service/product refinement based on findings.
- Prioritize next steps based on objectives.
- **Communicate changes** made to members, building trust.

**This comes into play during
strategic planning implementation**



Identifying Key Performance Indicators (KPIs) and Metrics

- KPIs should directly support overarching goals and objectives of your plan.
 - Example: If the goal is to increase member retention, a KPI could be retention rate by membership tier
- Make KPIs SMART
 - Specific, Measurable, Achievable, Relevant, Time-Bound
- Engage stakeholders to understand what success looks like to members.
- Leading/Lagging Indicators
 - Leading indicators predict future success (# of new member inquiries/month)
 - Lagging indicators reflect past performance (annual member retention rate)
- Prioritize Simplicity



KPI Examples

Membership Growth and Retention:

- Membership renewal rate (%).
- Number of new members per quarter.
- Average membership tenure (years).

Engagement and Participation:

- Event attendance rates (% of members).
- Engagement rate on digital platforms (e.g., email open rates, social media interactions).
- Number of members participating in committees or volunteer roles.

Financial Health:

- Revenue growth from membership dues (%).
- Sponsorship revenue as a percentage of total income.
- Cost per member acquisition (\$).

Program Effectiveness:

- Satisfaction scores from member surveys (scale of 1-10).
- Number of certifications or training completions.
- Net Promoter Score (NPS) for programs or services.



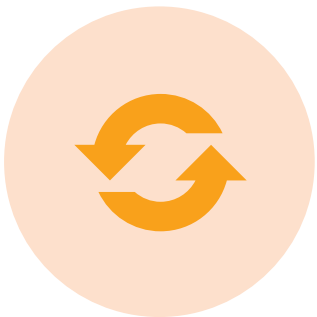
Tips for Monitoring and Reporting



Dashboards: Use visual tools to track and share progress regularly.



Frequency: Review KPIs quarterly or biannually to ensure relevance.



Adjust as Needed: Refine metrics based on changing priorities or new insights.



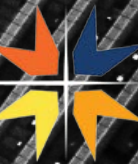
Communicate Results: Share progress with stakeholders to build trust and transparency.



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Facilitation Techniques

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Facilitation Techniques

- Guiding boards through productive discussions
- Strategies for managing difficult group dynamics
- Building consensus
 - The goal is not to solve every problem, but to unify around bucketed goals/objectives.
 - Pre-work
 - Brainstorming through breakout sessions and round table discussions
 - Giving everyone a chance to be heard

Proven Techniques

- SWOT Analysis
- Environmental Scanning
- Root Cause Analysis
 - 5 Why's / 5 How's
- Fishbone
- Pareto Analysis
- Fault Tree Analysis (FTA)



Brainstorming and Roundtable Discussions

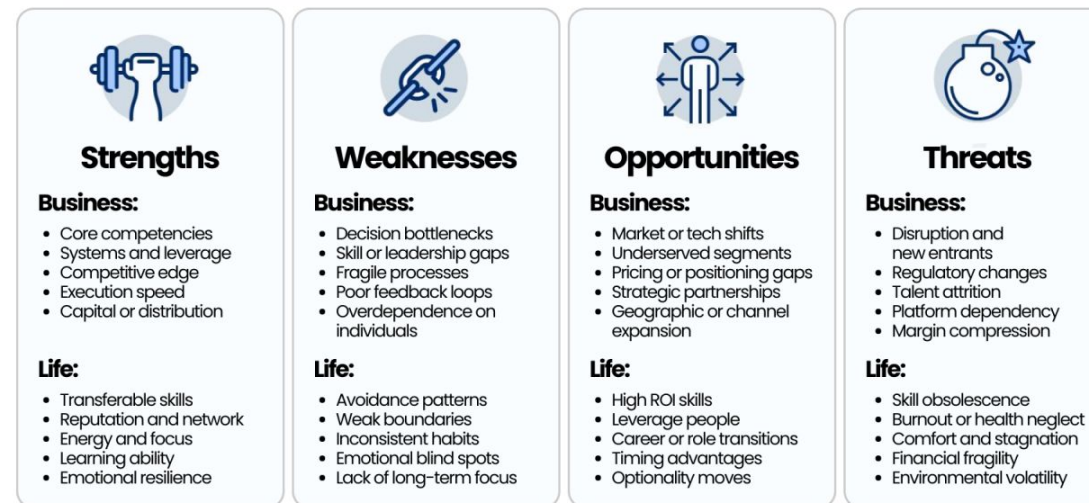
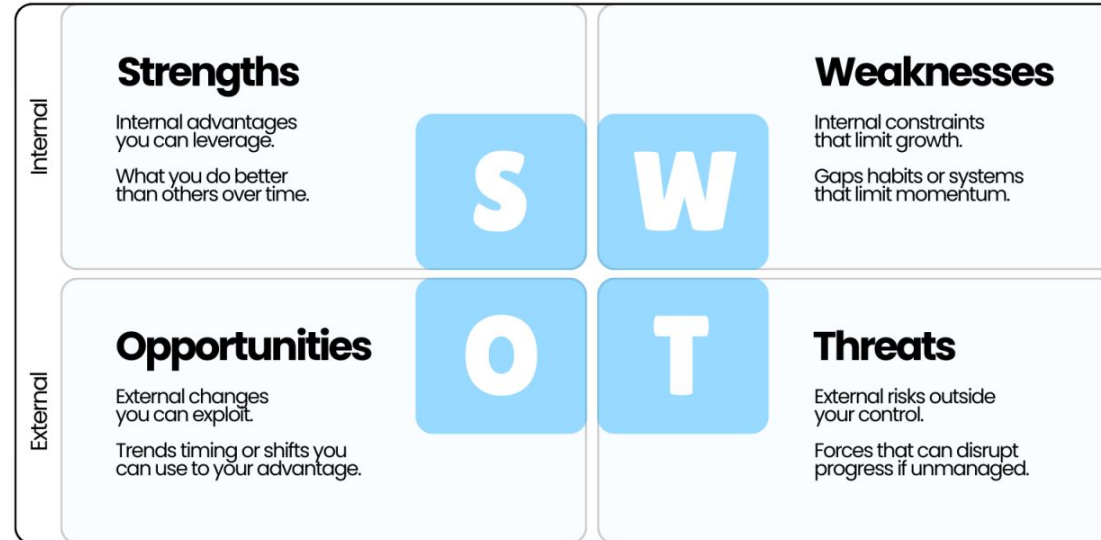
- Give clear prompts for discussion
- Identify scenarios to talk through
- Group people together that don't normally interact
- Use tactical parking lot when people start getting into the weeds!



SWOT Analysis

One strategic framework for business and life.

BY NATAN MOHART



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Environmental Scan

Industry Trends



Economic Conditions



Regulatory Changes



Competitive Landscape



Technological Shifts



Social and Environmental Factors



Industry Environmental Scan



Industry Trends

- Growing demand for innovative sustainable and durable paving solutions.
- Advancements in concrete technology, including new mix designs and materials.
- Importance of life cycle cost analysis.



Economic Conditions

- Issues like inflation and material availability are affecting levels of transportation funding and project costs.
- Monitoring transportation funding levels within the state and plans for future development.



Regulatory Changes

- Evolving state and federal standards for material quality and environmental impact.



Industry Environmental Scan



Competitive Landscape

- Asphalt continues to dominate specific market segments due to perceived cost-efficiency.
- Lack of awareness among municipalities about the long-term value of concrete vs. asphalt.
- Continued monitoring of project competition



Technological Shifts

- Introduction of automation and artificial intelligence tech in construction processes.

Social and Environmental Factors

- Sustainable materials push introducing new materials into the market.
- Increasing expectations of public infrastructure resilience in the face of extreme weather (deicing, freeze thaw, etc.)
- Leadership development identified as a need for the industry emerging professionals.



Environmental Scan

Industry Trends



Economic Conditions



Regulatory Changes



Competitive Landscape



Technological Shifts



Social and Environmental Factors



Root Cause Analysis

A structured approach to identify why a problem has happened.

What is it?

- Focus on causes not blame
- Looking beyond symptoms to identify and eliminate underlying system or process issues
 - Symptoms are surface level
 - Root Causes are underlying systemic issues
- Leads to permanent corrective actions
- Incorporates many different techniques

Why is it important?

- Improves quality safety and efficiency
- Supports continuous improvement
- Reduces cost/waste
- Builds a problem-solving culture



Root Cause Analysis Process

Clearly articulate the problem using the SMART framework:

- Specific
- Measurable
- Achievable/Attainable
- Relevant/Realistic
- Time-bound

Collect relevant data and evidence: GIGA (Garbage In, Garbage Out)

Identify potential causes to the problem:

- 5 Why's
- 5 How's
- Fishbone Diagram
- Fault Tree Analysis
- Pareto Analysis

Pinpoint the root cause, develop corrective actions and execute those tactics

Continuously monitor



The Power of the 5 Why's

- Step 1: Define the problem clearly in a single, objective statement.
- Step 2: Ask “Why” is this happening
- Step 3: Take that answer and ask “why” again.

Example:

- Problem: Our latest software feature missed its launch deadline
- Why 1: The development team lacked the time to finish coding.
- Why 2: the team had to spend two weeks fixing unexpected bugs from the previous release.
- Why 3: The QA team didn't catch the bugs during the test phase.
- Why 4: The QA team didn't have access to the final update.
- Why 5: Our product management and QA teams do not have a standardized communication protocol for mid-cycle requirements changes.

Be careful in strategic planning sessions not to get too far into the weeds.



Implementing with the 5 “How’s”

- Once you have identified the root cause of an issue or problem, pivot to the “how” – shifting focus from “what went wrong” to “how do we fix it?”
- This is the time to brainstorm!
- If you don’t know “how” – what would you say if you did?
- There might be multiple “how” answers.
- Step 1: Take the root cause and ask “How do we resolve this?”
- Step 2: Take that answer and ask “How do we implement that?”
- Step 3 – 5: Continue asking “how” to break the strategy into granular, daily operational steps.

*Again – keep things big picture in the context of strategic planning.



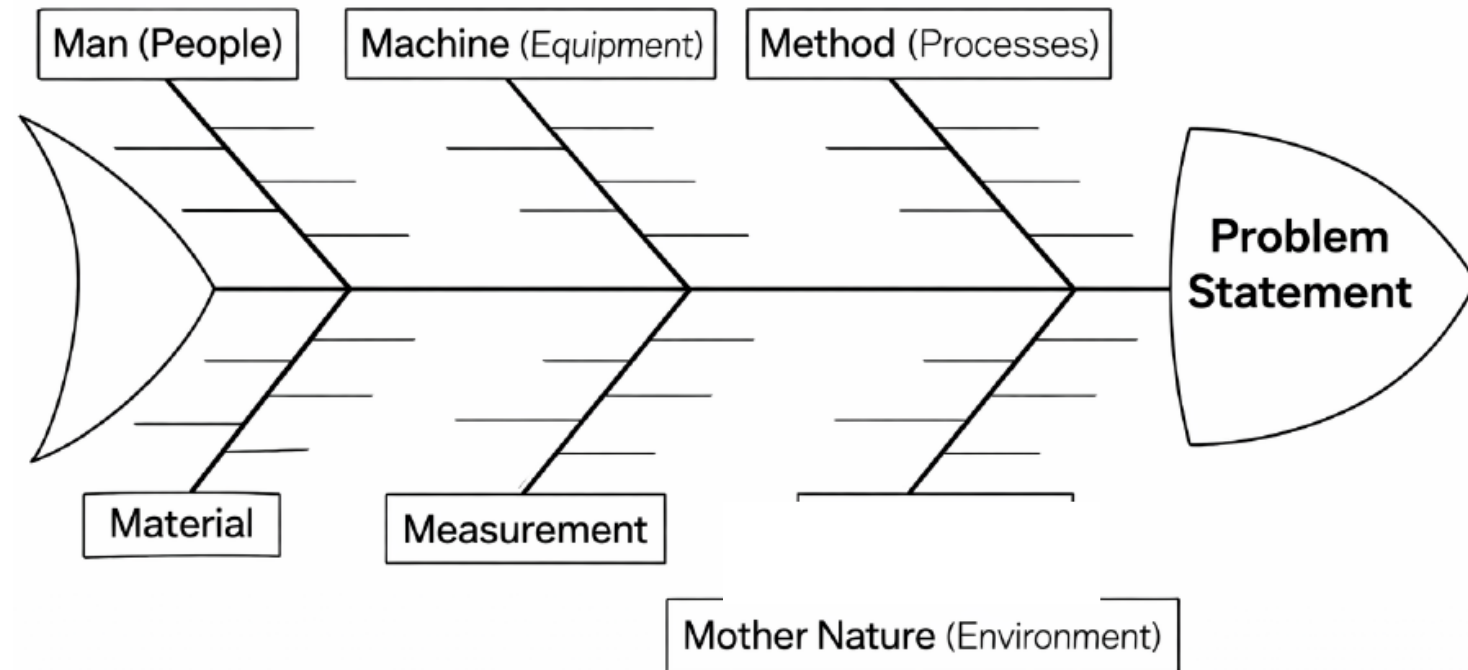
The 5 Why Process - Tips for Implementation

- Be Objective: Focus on processes, programs, system flaws, etc. – NOT people.
 - Collaborate with people close to the problem
- Verify with Data: Back up your answers with facts – not assumptions.
- Know When to Stop: 5 is a guideline – you may get to the crux of an issue at step 3.
- Flaws:
 - Can oversimplify complex issues
 - You risk jumping to conclusions
 - Facilitator may easily influence the conversation



Fishbone Diagram – (Ishikawa)

- Diagrams cause and effect visually
- Helps clarify relationships, aids brainstorming and identifies areas where further data is needed.
- **Elements:**
 - Man (I hate this description) – what ROLES or elements that develop your team touch this problem?
 - Machine – Equipment involved
 - Method – processes, procedures that affect the problem
 - What materials feed the issue?
 - Measurements – what is used to track outcomes?
 - Environment – what factors influence this issue outside your organization?



Fishbone Examples

Manufacturing Example

- **Problem:** Decline in product quality
- **Man:** Inadequate training
- **Machine:** Equipment malfunction
- **Method:** Poor SOP adherence
- **Material:** Substandard raw inputs
- **Measurement:** Inaccurate tools
- **Environment:** Humidity affecting assembly

Association Example

- **Problem:** Decline in member engagement
- **“Man”** – lack of staff training, insufficient communication between departments, overworked staff,
- **Machine:** no clear member engagement plan/strategy, inconsistent member follow-up after events/renewals, no onboarding for new members
- **Materials:** member content too generic; lack of personalized resources or relevant member benefits hitting specific needs. Lack of budget to support engagement activities
- **Measurement:** No identified KPI’s for member engagement, infrequent surveys, lack of data
- **Environment:** Competing associations, economic downturn, member preference shifts



Pareto Analysis Technique

1. List problems or causes with their frequencies or impact
2. Sort from highest to lowest frequency
3. Calculate cumulative percentage
4. Create a Pareto Chart (bar + line graph)
5. Identify the “vital few” (typically top 20% causes)

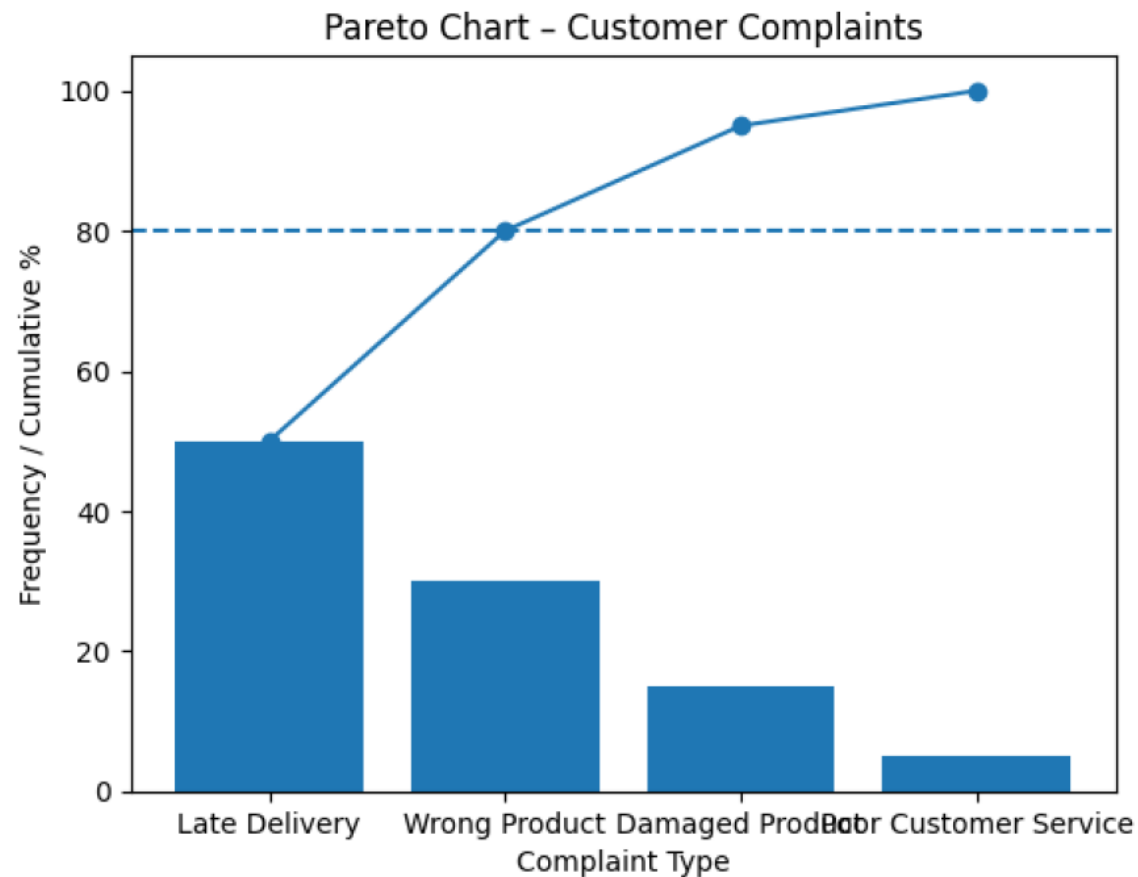
Example:

- Category - Complaint Type | Frequency
- Late Delivery | 50
- Wrong Product | 30
- Damaged Product | 15
- Poor Customer Service | 5

Pareto Chart shows that Late Delivery and Wrong Product account for 80% of complaints



Visualizing Pareto



This doesn't reveal a root cause on it's own.

Helps drive home points, visualize data for stakeholders.

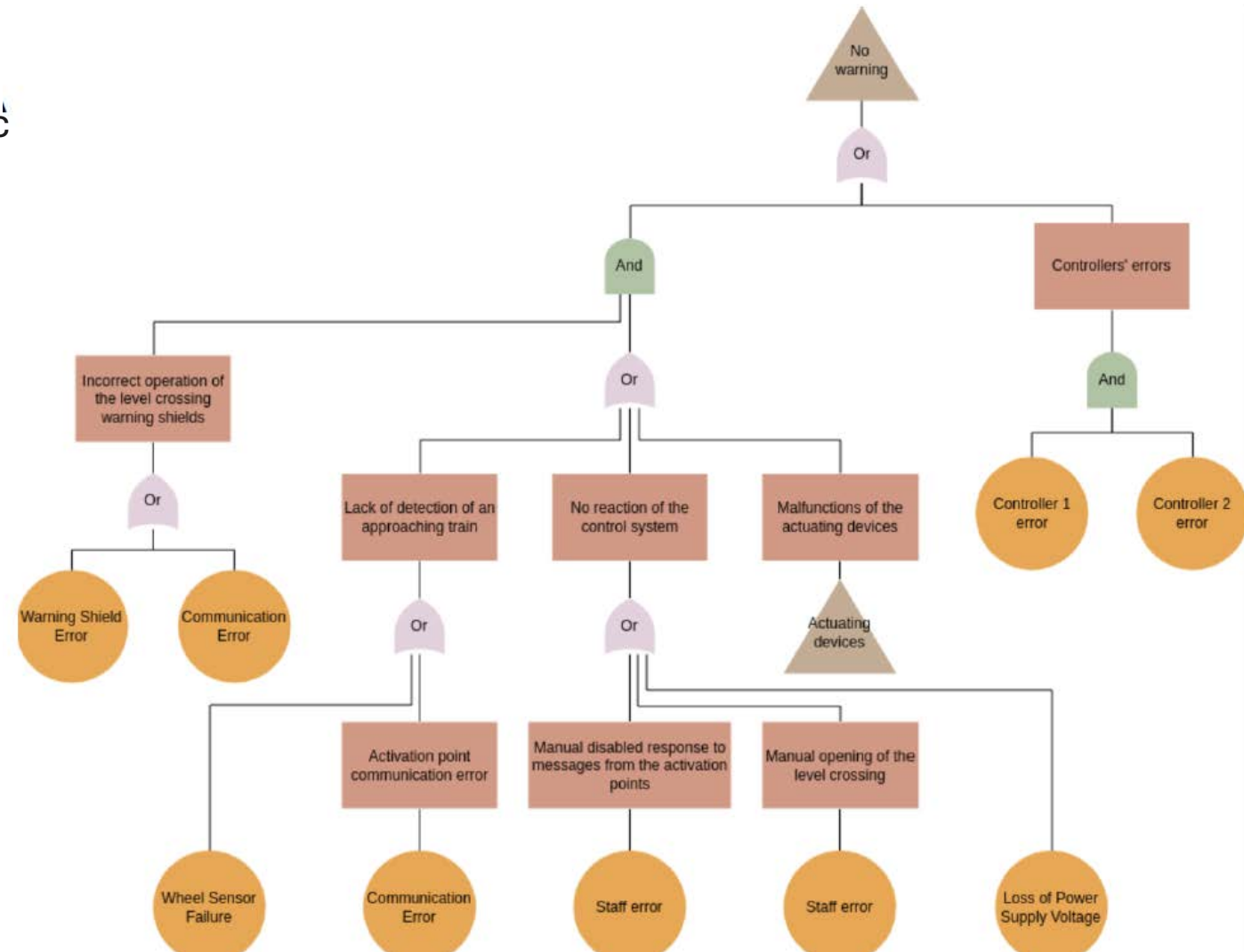
Requires reliable data

Can overlook low-frequency, but high-risk issues



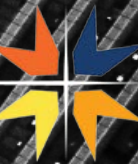
Fault Tree Analysis (FTA)

- Can be used for complex problems
- Uses a top-down approach to deduce systemic failures
- Shows relationship between events
- We are basically talking about a flow chart.



Implementation

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Strategic planning trends

- **Succession planning:** C-level approaching retirement
- **Interactive reporting:** Videos, graphic reports, post report or meeting surveys
- **AI:** Making a splash in strategic plans!
- **Competitive analysis:** Helps identify opportunities for differentiation/innovation
- **Cyber security and data collection**
- **Departmental strategy plans**
- **Pre-work**



Planning Pitfalls:

Common mistakes and lessons learned

There are several common mistakes that organizations make when it comes to strategic planning. Here are some tips to avoid these blunders:

- Don't satisfy before you identify
- Avoid naval gazing
- Don't be vague or lazy during environmental scans – SWOT process, Five Forces, etc.
- Identify meaningful metrics and measurements
- Communicate the process
- Don't involve the wrong people in the process
- Look at the plan regularly!
- Don't over complicate the message
- Don't overlook maintaining your image/market presence in a new plan



Creating time for strategy

Avoid Strategic Dysfunction!

- Siloed work environments can lead to misalignment with organizational goals.
- Dedicated strategists and leaders should be equipped to carry the strategic goals through the company to align with work.
- Invest in team development – formal training and on-the-job experiences help connect the dots!

Failing to Plan is Planning to Fail!

- Balance reactive modes with proactive approaches that focus on reviewing market changes, audience insights and competitor analysis.

Continually Review

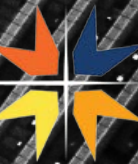
- Plans require regular monitoring to review and adapt to market shifts.
- Consider interactive methods of encouraging strategic thinking like scenario planning, channel testing, and data review.



Questions?

Thank you!

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Strategic Plan Examples

You may end up with two versions of your Strategic Plan

- **Internal plan** (tactics, details, committee assignments, departmental details, etc.)
- **Public plan** (high level mission, vision, goals, objectives) that you use to communicate your direction to different audiences.

Examples to Discuss:

- Hypotheticals
- ACPA
- KCA





Goals

Overarching statements that identify where we would like to be as an organization. Goals are usually tied to long-term organizational initiatives and values.

- **Example:** Maintain s reputation as a trusted technical resource for the paving industry.



Objectives

Strategic and measurable outcomes that support a goal and show success or needs for improvement over time. Usually, there will be 3 or more objectives that support a goal.

- Drive the engagement of DOT and local officials by doubling reported touchpoints annually by the end of 2027.





Tactics

These are actionable items that support objectives. Including a timeline and who is responsible is often helpful.

- **Examples:**

- **Tactic 1:** Staff to host an exclusive networking dinner with DOT executives, leaders and local government officials during yearly workshops to encourage informal discussions and strengthen relationships starting Q1 2026.
- **Tactic 2:** Staff to conduct on-site visits with member companies to 10 major county or local projects alongside representatives to provide technical guidance and gather feedback annually, beginning Q4 2025.
- **Tactic 3:** Staff and task group to develop a digital dashboard for members and stakeholders, tracking and showcasing annual touchpoints, engagement outcomes, and collaborative achievements with DOT and local governments starting Q3 2025.



Strategic plan example: Engineering Firm

Goal

- Elevate our firm's win rates and market reputation by providing superior, client-focused proposal and marketing services.

Measurable Objective

- Achieve a 15% increase in client proposal win rates within two years by refining our internal processes and enhancing the customization of each submission.

Key Metrics

- Percentage increase in proposal win rates.
- Number of custom-tailored proposals submitted per quarter.
- Frequency of positive client feedback regarding proposal quality and responsiveness.



**Achieve a 15% increase
in client proposal win
rates within two years by
refining our internal
processes and enhancing
the customization of
each submission.**

Tactics

- **Strengthen Proposal Development Processes**
 - Conduct internal audits of recent proposals to identify improvement areas.
 - Develop and implement a standardized workflow for all proposal projects.
 - Incorporate regular peer reviews to ensure accuracy, compliance, and impactful messaging.
- **Enhance Customization and Client Collaboration**
 - Schedule kickoff meetings with clients for each proposal to understand unique goals and differentiators.
 - Build tailored content libraries that highlight each firm's strengths and past success stories.
 - Integrate client feedback into every draft to ensure alignment with their vision and project needs.



**Achieve a 15% increase
in client proposal win
rates within two years by
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Tactics

- **Professional Development for Team Members**
 - Hold **monthly** training on industry trends, new RFP requirements, and storytelling techniques. (*rotates between each department head, can be delegated to department team members*)
 - Attend AEC industry conferences and webinars to stay current and network with potential clients. (*What webinars, who, what conferences, etc.*)
 - Encourage proposal writers and marketers to earn relevant certifications (e.g., CPSM). (*HR to ensure 70% of writers are working toward these certifications by July 2026*)
- **Leverage Technology and Data Analytics**
 - Utilize CRM and proposal management tools to track project milestones and measure outcomes, circulating monthly reports.
 - Analyze win/loss data quarterly to identify trends and adjust strategies. Who?
 - Implement tools for benchmarking client performance against industry averages (*Dept. Directors to organize implementation plan by Q4 2025*).



**Achieve a 15% increase
in client proposal win
rates within two years by
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Tactics

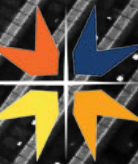
- **Client Communication and Relationship Building**
 - All client relationship managers deploy weekly status updates and transparent communication throughout the proposal process.
 - Offer post-proposal debriefs—win or lose—to gather feedback for continuous improvement within 1 week of notification that includes survey/feedback option.
 - Develop quarterly check-ins with client firm leaders to discuss evolving needs and collaboration opportunities.



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Thank you!

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Sources and Helpful Links

- [Guide: What to Do When a Board Member Is Overstepping](#)
- [How to handle overeager directors who want to micromanage](#)
- <https://bloomerang.com/blog/nonprofit-board-micromanagement/>
- www.imd.org

