

Strategic Pitfalls Cheat Sheet

Free Resource from Mission-Driven Momentum Podcast

Keep this guide handy when building or reviewing your strategic plan. Use it to identify potential problems before they derail your momentum.

PITFALL #1: PLANNING IN A VACUUM

What It Looks Like:

- Leadership creates the plan behind closed doors
- Staff learn about strategy through an announcement
- Key voices are missing from the planning process
- Team members feel surprised or confused by priorities

Why It Happens:

- Time pressure to "just get something done"
- Assumption that leadership knows best
- Fear that too many voices will slow things down
- Lack of systems for gathering input

The Cost:

- Low buy-in from staff
- Resistance during implementation
- Missed insights from frontline perspectives
- Disconnect between plan and reality

The Fix:

- ✓ **Involve diverse voices** from the start (staff, board, community partners)
- ✓ **Host listening sessions** before you start planning
- ✓ **Create working groups** representing different departments or roles
- ✓ **Share draft plans** for feedback before finalizing
- ✓ **Ask:** "Who else needs to be in this conversation?"

Quick Check:

- Did we include at least 3-5 non-leadership voices in planning?
- Do staff understand how they contributed to the final plan?
- Would team members say they felt heard?

PITFALL #2: VAGUE GOALS & FUZZY METRICS

What It Looks Like:

- Goals like "increase engagement" or "grow our reach"
- No specific numbers or deadlines
- Unclear what success actually means
- Can't tell if you're making progress

Why It Happens:

- Fear of committing to specific targets
- Desire to keep options open
- Lack of data to inform realistic goals
- Confusing aspirations with actionable goals

The Cost:

- No way to measure progress
- Teams don't know what to prioritize
- Can't celebrate wins (because you don't know if you had one)
- Funders get confused about your impact

The Fix — Use the SMART Framework:

- **Specific** — Who, what, where, when, why
- **Measurable** — Numbers, metrics, tangible outcomes
- **Achievable** — Realistic given your capacity
- **Relevant** — Directly supports your mission
- **Time-bound** — Clear deadlines

SMART Goal Examples:

VAGUE: "Improve donor relations"

SMART: "Increase donor retention rate from 45% to 60% within 18 months by implementing quarterly stewardship touchpoints"

VAGUE: "Expand our programs"

SMART: "Serve 150 additional youth participants across 2 new program sites by December 2026"

VAGUE: "Build community partnerships"

SMART: "Establish MOUs with 5 local organizations to create a coordinated referral network by June 2026"

Quick Check:

- Can someone read our goal and know exactly what success looks like?
- Does our goal include a number and a deadline?
- Could we track progress monthly or quarterly?

PITFALL #3: THE DISAPPEARING PLAN

What It Looks Like:

- Strategic plan created with fanfare... then never mentioned again
- Plan sits in a shared drive no one opens
- No follow-up meetings or progress tracking
- Team members forget priorities within weeks

Why It Happens:

- Treating planning as a one-time event, not an ongoing process
- No ownership assigned for implementation
- No systems to keep plan visible
- Day-to-day urgency drowns out strategic priorities

The Fix:

- ✓ **Assign clear owners** for each goal and action step
- ✓ **Schedule regular check-ins** (monthly or quarterly)
- ✓ **Make the plan visible** — reference it in meetings, post priorities, link in email signatures
- ✓ **Track progress** with a simple dashboard or tracker
- ✓ **Celebrate wins** publicly when milestones are hit

Plan Visibility Ideas:

- Create a one-page visual summary to post in the office
- Add "Strategic Priority Update" as a standing agenda item
- Send monthly progress emails highlighting wins
- Use project management tools (Asana, Trello) to track goals
- Include strategic priorities in performance reviews

Quick Check:

- Does everyone know where to find the strategic plan?
- Have we talked about the plan in the last 30 days?
- Can team members name our top 2-3 priorities from memory?

PITFALL #4: OVERPLANNING, UNDER-EXECUTING

What It Looks Like:

- Months spent perfecting the plan
- Endless revisions and wordsmithing
- Analysis paralysis — afraid to start
- More time planning than doing

Why It Happens:

- Perfectionism disguised as thoroughness
- Fear of making the "wrong" choice
- Avoiding accountability that comes with action
- Confusing planning with progress

The Fix:

- ✓ **Set a planning deadline** and stick to it
- ✓ **Embrace "Version 1.0" mindset** — start and improve as you go
- ✓ **Use the 80/20 rule** — good enough to start beats perfect someday
- ✓ **Build in learning loops** — plan to adjust based on what you learn
- ✓ **Focus on action** — what's one thing we can do THIS WEEK?

Version 1.0 Mindset:

- Your plan doesn't have to be perfect to be useful
- Real-world testing reveals more than endless meetings
- Progress creates momentum; perfection creates paralysis
- You can always adjust — that's what makes it strategic

Quick Check:

- Have we been planning for more than 3 months?
- Has our team taken concrete action in the last 30 days?
- Are we learning by doing, or just theorizing?

PITFALL #5: IGNORING CULTURE & COMMUNICATION

What It Looks Like:

- Great plan on paper, but team feels disconnected
- Strategy announced but never explained "why"
- No space for questions or feedback
- Culture of fear prevents honest conversation

Why It Happens:

- Treating strategy as separate from culture
- One-way communication (leadership talks, staff listens)
- Assuming everyone understands the context
- Not creating psychological safety

The Fix:

- ✓ **Communicate the "why"** behind strategic choices
- ✓ **Create two-way channels** for questions and feedback
- ✓ **Build psychological safety** — make it safe to disagree or ask questions
- ✓ **Align culture with strategy** — reward the behaviors your strategy requires
- ✓ **Tell stories** about what the strategy means in practice

Communication Best Practices:

- Share strategy through multiple channels (meetings, email, 1-on-1s)
- Repeat key messages 7-10 times (yes, really)
- Connect strategy to individual roles and responsibilities
- Create forums for questions without judgment
- Follow up on feedback publicly

Quick Check:

- Can team members explain WHY our priorities matter?
- Do people feel safe asking questions about strategy?
- Does our culture support the behaviors our strategy requires?

PREVENTION CHECKLIST

Use this before you start planning:

- Inclusion:** Who needs to be involved from the beginning?
- Clarity:** What does success look like in specific, measurable terms?
- Ownership:** Who will champion this after planning ends?
- Timeline:** When do we need to STOP planning and START doing?
- Culture:** Is our team ready to support this strategy?
- Communication:** How will we keep this plan alive and visible?

EMERGENCY ASSESSMENT

Already in trouble? Use these questions:

If your plan is stalling:

- Is everyone clear on their role?
- Do we have regular check-ins scheduled?
- Are obstacles being addressed or ignored?

If buy-in is low:

- Did we involve people early enough?
- Have we explained the "why" clearly?
- Is there a culture issue we're not addressing?

If goals feel impossible:

- Are they truly SMART goals?
- Do we have the capacity we thought we had?
- Should we adjust rather than abandon?

CONVERSATION STARTERS

Use these in your next team meeting:

-  "Looking at our current plan, which pitfall are we most at risk for?"
-  "What's one thing that would make our strategy more actionable?"
-  "If you could change one thing about how we do strategic planning, what would it be?"
-  "What support do you need to help implement our strategy?"

NEED MORE SUPPORT?

Podcast: Listen to Episode 2 at missiondrivenpod.com

Blog: Read the companion post for deeper examples and stories

Consulting: Stuck in a planning pitfall? Contact The Scanland Group at contact@thescanlandgroup.com or visit thescanlandgroup.com

From The Scanland Group:

*Keep leading with heart, keep showing up with purpose,
and keep creating a world where everyone belongs.*