

B L A C K F O X S T R A T E G Y

**THE CEO'S GUIDE TO**  
**Choosing a Strategic Planning Facilitator**  
*(And Actually Getting ROI from the Process)*

---

*A Practical Guide for CEOs and Executive Directors  
Who Are Done Wasting Time and Money on Plans That Don't Work*

**Erin Sedor**  
Executive Advisor & Strategic Performance Expert  
[ErinSedor.com](http://ErinSedor.com)

*New Science. Ancient Wisdom. Better Business.*



## Let's Start with the Uncomfortable Truth

You've done strategic planning before. You probably have a binder, a slide deck, or a shared drive folder to prove it. And if you're reading this guide, there's a good chance that plan didn't deliver what you needed it to.

You're not alone. Ninety percent of organizations fail to execute their strategies successfully. Not because the people are incompetent or the goals are wrong, but because the process that produced the plan was never designed to solve the real problems underneath.

If you're a CEO or executive director preparing for a strategic planning engagement — whether it's your first or your fifth — the person you choose to guide that process will have more impact on the outcome than any framework, tool, or methodology you select. Choose well, and you walk out with a plan your team believes in and can actually execute. Choose poorly, and you walk out with another expensive document that changes nothing.

This guide is designed to help you choose well. And to set up the engagement so you get a genuine return on the investment — not just a productive-feeling couple of days followed by business as usual.

### Why Most Strategic Planning Sessions Produce Shelf Plans

Before we talk about who to hire, it helps to understand why so much strategic planning goes wrong. Because the facilitator isn't the only variable — but the right one will address the problems that the wrong one perpetuates.

Most strategic planning follows a predictable script. The calendar says it's time. Someone books a conference room or an offsite venue. The facilitator dusts off the previous plan, reviews the mission statement, runs through a SWOT analysis, and asks leadership to generate goals for the next three to five years. Three days later, there's a document. Everyone feels aligned. Within 90 days, the plan is sitting on a shelf while the organization goes back to operating the way it always has.

The problem isn't that the team didn't try. They did. The problem is that the process itself was never designed to surface what's actually happening inside the organization. It checked boxes instead of solving problems.

Eighty percent of leaders feel good about crafting strategy, but only 44% feel good about implementing it. That 36-point confidence gap tells you exactly where the breakdown occurs: somewhere between the energy of the planning room and the reality of what



happens Monday morning. And that gap is almost always a process problem — one that the right facilitator should be designed to close, not widen.

## **The Industry Expert Myth**

Here's the most expensive mistake I see CEOs make when hiring a strategic planning facilitator: they look for someone from their own industry.

It makes intuitive sense. Healthcare CEO hires a healthcare strategy consultant. Manufacturing executive brings in someone who's worked with other manufacturers. Nonprofit director seeks out a facilitator with nonprofit experience. The logic is straightforward: they'll understand our world.

The logic is also wrong.

You and your team are the industry experts. You live inside that world every day. You know your market, your customers, your regulatory landscape, and your competitive pressures better than any outside consultant ever will. That expertise is not what's missing from your strategic planning process.

What's missing is someone who can see beyond it.

An industry expert brought in to facilitate strategy will validate what you already know. They'll speak your language, nod at your assumptions, and organize your existing thinking into a tidy document. What they won't do is challenge those assumptions. They won't push the boundaries of what your team believes to be true. They won't break things when things need breaking — because they're anchored in the same conventional wisdom your team already operates from.

What you actually need is someone who is an expert in strategy systems and design. Someone whose skill set augments what your team already brings — not duplicates it. A person with the perspective and analytical depth to see connections your team can't see from inside the operation. Someone trained to ferret out blind spots, test assumptions, and surface the organizational dynamics that are silently driving your results — for better or worse.

You don't need someone to tell you what you already know. You need someone who can push you past it.

The best strategic planning facilitators don't compete with your team's operational expertise. They build on it. They ask the questions that industry insiders take for granted. They connect dots between seemingly unrelated functions. And they bring a diagnostic lens that is specifically designed to reveal what's hiding in plain sight.



When you hire for industry familiarity, you get a comfortable process and a predictable plan. When you hire for strategic design expertise, you get the kind of challenge that produces plans worth implementing.

## **Facilitator vs. Strategist: Know What You're Buying**

Not all outside help is created equal, and the language the consulting world uses doesn't make this easy to sort out. So let me be direct about a distinction that will save you significant time and money.

A **facilitator** manages the room. They keep the conversation on track, ensure everyone participates, handle group dynamics, and deliver the discussion toward a set of predetermined outcomes. A good facilitator creates space for productive dialogue. That's valuable — running meetings is something you do every day, and facilitation for strategic planning requires a different skill set than your typical Tuesday morning check-in.

A **strategist** does all of that and goes several layers deeper. They don't just manage the conversation — they shape the inquiry. They bring diagnostic capability, meaning they can assess the health of your organization's strategy, operations, culture, and alignment before the workshop even begins. They design a process that's tailored to the specific problems your organization is facing, not a generic planning template they run with every client. And they have the expertise to spot risks, gaps, and blind spots that your team — brilliant as they are — cannot see from the inside.

The distinction matters because of what you're trying to accomplish. If you simply need someone to run a discussion where your leadership team generates goals, a facilitator will do. If you need to solve real strategic problems — to understand why performance is stalling, why alignment keeps breaking down, why the last plan didn't stick — you need someone who understands strategy design, not just group process.

A strategist brings problem-solving expertise to the table. They won't just ask your team what your goals should be. They'll help you figure out whether you're even asking the right questions — and that difference determines whether you leave with a plan that lives or a plan that sits.

## **What to Look For (And What Should Give You Pause)**

### **Look for these:**

**Broad strategic expertise, not narrow specialization.** You want someone who can see your entire organization holistically — not just one function. The connections between finance, operations, culture, talent, and market position are where the real



strategic insight lives. If your facilitator can only go deep in one area, they'll miss the interdependencies that make or break execution.

**A diagnostic approach, not a templated one.** Be wary of anyone who shows up with the same process for every client. Your organization is unique, and your strategic planning process should reflect that. The right person will want to understand who they're working with, what you're trying to accomplish, and what's actually happening inside your organization before they design a single workshop activity.

**Curiosity and listening over telling.** The best strategic thinkers are relentless listeners. They ask more questions than they answer, especially early in the engagement. They're genuinely curious about your business — not looking for openings to insert their own frameworks. If someone spends more time talking about their methodology than asking about your challenges in the first conversation, that's information.

**Comfort with conflict and ambiguity.** Strategic planning done well surfaces tension. It has to. The facilitator you choose must be able to navigate disagreement without shutting it down, hold space for ambiguity without rushing to resolution, and work with even the most difficult personalities on your team. If they need the room to be comfortable in order to function, they're the wrong hire.

**The heart of a teacher.** The best guides don't just produce a plan — they help your team learn how to think strategically. When the engagement is over, your team should be smarter about strategy, not more dependent on the consultant. Look for someone who is willing to help you learn, not just do.

**Proof in the work.** Review testimonials. Look at the depth and quality of their project experience. Ask for references from other CEOs or executive directors who've worked with them. The right person won't hesitate to connect you with past clients.

### **Watch out for these:**

**The SWOT-and-go facilitator.** If the proposed approach is essentially SWOT analysis, goal-setting, and a binder at the end, you're paying for a process you could run yourself. Strategy design requires far more depth.

**One-trick ponies.** Anyone locked into a single methodology, tool, or framework should give you pause. Organizations are complex. The process should be flexible enough to fit the problem, not the other way around.

**Industry insiders masquerading as strategists.** As we discussed: you need someone who is an expert in strategy design, not someone who happens to know your industry. If industry knowledge is their primary selling point, keep looking.



**The consultant who avoids pre-work.** If someone is willing to walk into a two-day workshop without doing meaningful discovery first, they're going to run a generic process. Period. A strategist who takes the work seriously will invest time up front to understand the organization they're serving.

**The pitch-and-switch team.** Pay attention to who shows up for the sales conversation and who shows up for the work. In many large firms, the senior partner pitches the engagement and then hands it off to a team of junior associates who do the heavy lifting. Ask directly: who will be in the room with my leadership team? If the answer is anyone other than the person whose experience convinced you to hire the firm, you're not getting the expertise you're paying for. Strategic planning demands seasoned judgment in real time — not reviewed after the fact on someone else's summary notes.

## **How to Set Up the Engagement for Real ROI**

Choosing the right person is half the equation. The other half is how you set up the engagement itself. Even the best strategist in the world will struggle to deliver results if the conditions aren't right. Here's what you can control.

### **Give enough lead time.**

If you want a well-designed process, plan for at least four to six weeks of lead time before the workshop. That's not bureaucracy — it's how your strategist conducts discovery, reviews organizational data, designs the right facilitation approach, and builds a plan that's tailored to your specific challenges. Trying to compress this into two weeks gets you a rushed, generic process and undermines the very thing you're paying for.

A word on that discovery process, because it's more than a checkbox. A good strategist will resist locking in a workshop agenda until the discovery work reveals what's actually going on. How your team communicates, where the unspoken tensions live, what the organization looks like beneath the surface narrative — these things shape the entire engagement design. If your facilitator already has the agenda built before they've done the listening, they're designing for their process, not your organization. The questions that seem most elementary often unlock the most important answers.

### **Be honest about what you're dealing with.**

Your facilitator can't help you solve problems they don't know about. Be forthcoming about the internal challenges, the interpersonal dynamics, the sacred cows, and the things you're worried will surface in the room. The more honest you are in the pre-work conversations, the better equipped they'll be to design a process that addresses reality



instead of dancing around it. You should have the utmost confidence that the person you're working with has the skill and judgment to handle whatever comes up.

### **Be clear about what you're trying to accomplish.**

This sounds obvious but it isn't. "We need a new strategic plan" is not a clear objective. What problem are you trying to solve? What decisions need to be made? What's not working that must change? The sharper your framing going in, the more productive the engagement will be. And if you can't articulate it clearly yet, that's fine — tell your strategist that, too. Helping you get clear on the question is part of the work.

### **Define deliverables and expectations up front.**

Ask to see a facilitation plan before the workshop begins. You should understand the approach, the expected outcomes, and the specific deliverables you'll walk away with. If your facilitator can't articulate these clearly, it's a sign that the process isn't designed with enough rigor.

### **Have key information ready.**

Don't make your strategist start from a blank slate unless that's intentional. Prior plans, performance data, employee feedback, market research, board priorities — the more context you can provide, the deeper the work can go. Discovery is faster and richer when the baseline information is accessible.

### **Protect the space.**

This is a leadership discipline, not a calendar appointment. Ban phones and laptops from the room. If possible, schedule the sessions offsite so the team isn't pulled back into daily operations between conversations. Strategic planning requires a fundamentally different mode of thinking than running the business — and that shift doesn't happen when people are checking email between sessions.

### **Expect things to shift.**

Good facilitators read the room and adjust. If a critical issue surfaces that wasn't in the original plan, the process should flex to address it rather than steamrolling through the agenda. This is a feature, not a flaw. Your facilitator should be talking to you throughout the engagement — and you to them — to ensure the work stays productive and pointed at what matters most.

## **What Good Looks Like on the Other Side**

When a strategic planning engagement is done right — with the right person guiding the process, the right preparation supporting it, and the right commitment from your



leadership team — the outcomes are fundamentally different from what most organizations experience.

You won't just have a document. You'll have a leadership team that is genuinely aligned — not the kind of alignment where everyone nods in the room and goes back to their silos, but the kind where people understand not just what the priorities are but why those are the priorities, because they were part of solving for them.

You'll have clarity about the real problems your organization is facing, not the surface-level symptoms that most planning processes identify. And you'll have a plan that connects directly to those problems — one with clear priorities, realistic goals, and a path to execution that your team can actually follow.

You'll also have something harder to quantify but equally important: a team that learned something about how they work together. A good strategic planning engagement doesn't just produce outputs. It builds the strategic thinking capacity of the people in the room. Your team should come out of the process better at challenging assumptions, better at connecting the dots between functions, and better at having the honest conversations that strategy demands.

But here's the part most guides won't tell you: the real test isn't the day you walk out of the room. It's 90 days later. That's when the energy from the offsite has faded, daily operations have reclaimed everyone's attention, and the plan starts competing with everything else on the calendar. The organizations that sustain strategic momentum are the ones whose teams internalized the thinking behind the plan — not just the plan itself. When your people understand the “why” well enough to make aligned decisions without being told, that's when you know the engagement actually worked.

Expect this to take time. A well-designed engagement can produce genuine breakthroughs — moments where your team sees the organization differently than they did walking in. But converting those breakthroughs into lasting capability requires follow-through. New ways of thinking need practice before they become instinct. The engagement is the foundation. What you build on it is the investment that determines whether the ROI is measured in weeks or years.

That's the ROI that doesn't show up on a spreadsheet but shows up in everything your organization does after.



Strategic planning is one of the most consequential investments an organization makes. Not because of the money — though the investment is real — but because of the decisions it produces and the direction it sets. Those decisions deserve a process that's



built to surface truth, not confirm assumptions. And they deserve a guide who brings the strategic depth to match the complexity of what you're navigating.

Take the time to find the right one. Ask hard questions. Expect hard questions in return. And don't settle for a process that feels comfortable if what you actually need is one that pushes you.



*Erin Sedor is an executive advisor and strategic performance expert with 30+ years helping organizations build strategy that actually works. She is the creator of Essential Strategy and the Quantum Intelligence framework for conscious, adaptive leadership.*

*If you're preparing for a strategic planning engagement and want to explore whether Black Fox Strategy is the right fit, reach out at [erin@erinsedor.com](mailto:erin@erinsedor.com) or visit [ErinSedor.com](http://ErinSedor.com) to book a discovery call.*

A handwritten signature in black ink, appearing to read 'Erin Sedor' in a cursive, flowing style.

