

AI-Powered Strategic Planning



Housekeeping before we get started. Please:

- ✓ Get your computer up and running
- ✓ Log into your favorite AI tools
Claude, ChatGPT, Copilot
- ✓ Use the QR code to access session materials
Or access at <https://beacontechresearch.com/nextwave>



©2026 Proprietary and Confidential. All Rights Reserved.

A photograph of a laptop on a dark surface, with vibrant blue and red light effects emanating from the screen and keyboard area.

AI-Powered Strategic Planning

A Working Session on What Works (and What Doesn't)

Vanessa Dennison
Dennison & Associates

John Hooley
Beacon Tech Research

We are technologists



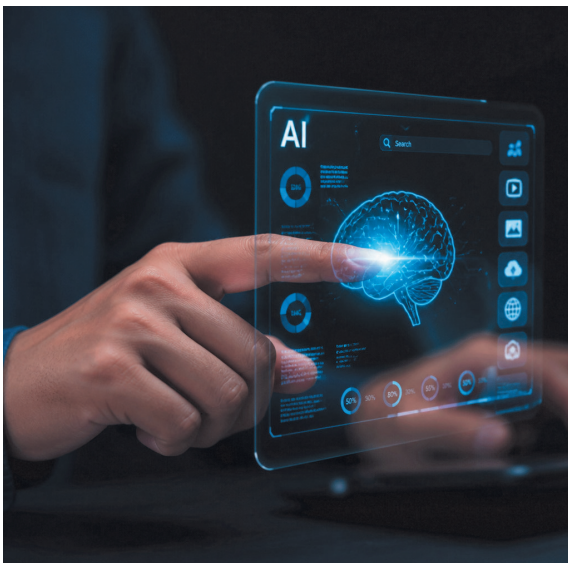
John Hooley



Vanessa Dennison, CAE

Here to help you, your organizations, and Associations West

So how can we help with strategic planning?



- ✗ We're not strategic planning facilitators
- ✓ We're technologists who know AI
- ✗ We're not going to tell you what's wrong with strategic planning
You probably already know...
- ✓ We are going to talk about where AI can and can't help with your strategic planning process
- ✗ We're not here to sell you on anything!

We all know the problems...

Here are two of the biggest issues we hear with strategic planning, straight from two of your peers



Association 1's issue:

Our consultant helped us create a plan that sat on a shelf because it didn't include things we could actually deliver on.

- Plan is too broad
- Addresses external factors association can't control
- Doesn't include ways to measure or operationalize



Association 2's issue:

The tasks would lose relevance because the context changes quickly, so staff would start ignoring the plan.

- Plan doesn't age well
- Not updated frequently enough
- Tasks don't reflect operational realities

Here's what you'll walk away with



A clear model for where AI belongs in planning, and where it doesn't



Ways to use AI during planning meetings, while respecting human input



Hands-on reps with using AI in all phases of planning



A method to turn a draft plan into assigned tasks, KPIs, and accountability check-ins



Techniques to run an environmental scan grounded in real research



Additional ideas from your peers

Last chance to get set up for exercises...



- ✓ Get your computer up and running
- ✓ Log into Claude, ChatGPT, Copilot or similar
- ✓ Use the QR code to access session materials
- ✓ Or access
at <https://beacontechresearch.com/nextwave>

Quick Level-Set



- 1 What level of AI understanding would you say you're at?
- 2 Who's doing something with AI beyond just prompting?

Imagine... a Hamburger

A simple (fun) model for the strategic planning process



- Top bun - Preparation
Before you start, you need to do research, environmental scanning, survey staff, gather data
- Meat (and spicy toppings!) - Discussion
The planning meetings with your board, discussion, back and forth, decision making
- Bottom bun - Follow through
The operationalizing needed to execute on the plan



Top Bun: Preparation

Where AI Can Help Before Planning Starts



Scan your industry's environment
Environmental scans grounded in your industry's concerns



Integrate staff input
Collect and incorporate staff day-to-day realities into board materials



Review association benchmarking
Identify what peer associations are doing and prioritizing right now



Apply strategic frameworks
Use proven strategic planning models or frameworks to shape your prep



Synthesize data
Turn raw member survey data into clear thematic pillars



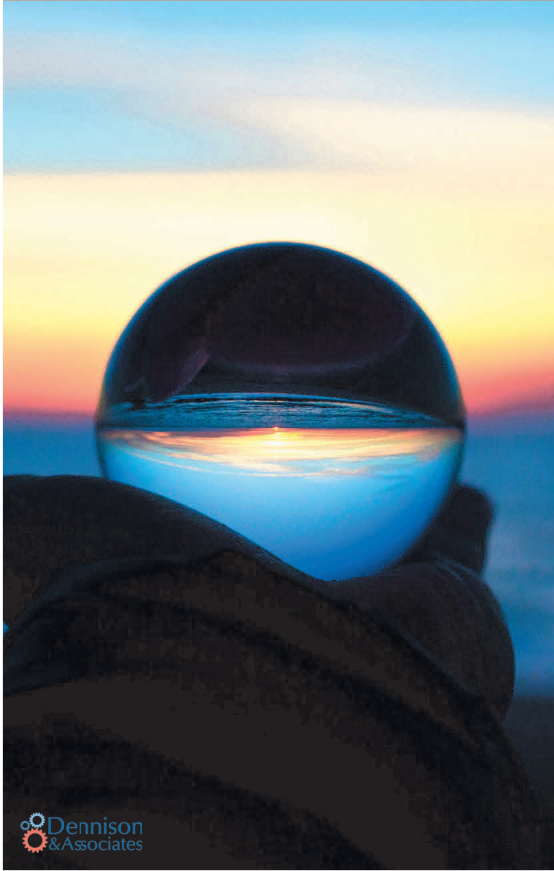
Sound out your ideas
Using AI to explore and shape your own ideas before bringing them to the board.

Live Demo: Apply Strategic Frameworks

Example taken from Association 1's real-world experience



- 1 Identify and collect data sources for PESTLE framework
See next slide
- 2 Collect data sources for SWOT analysis
SWOT: Strengths, weaknesses, opportunities, threats
- 3 Synthesize using AI prompts, artifacts, or tools
Projects, skills, Notebook LM
Be sure to give plenty of context for the task
- 4 Generate Board and staff content appropriate to inform the planning process
Don't forget that AI can create great slides and visuals now



PESTLE Framework

Assess the macro-environmental, external factors for your industry

Political: Factors involving government actions, policies, and stability

Economic: Broader financial conditions and market metrics.

Social: Societal attitudes, cultural trends, and demographics.

Techological: Innovation and the pace of digital or industrial change.

Legal: The regulatory and statutory framework businesses must follow.

Environmental: Ecological and sustainability influences.

©2026 Proprietary and Confidential. All Rights Reserved.

Exercise 1: Environmental Scanning - your turn!



- Access Exercise 1 materials and starter prompt QR code or <https://beacontechresearch.com/nextwave>
- Choose level 1, 2, or 3 based on your comfort
- Modify the prompt inputs with your own organization details and run
- Work with the output to shape results

Share out: What could you do further? What was most surprising?

Meat and Spicy Toppings: Planning discussions



AI Never Replaces Human Discussion and Decisions



- **Priority-setting**
The fundamental process of determining what matters most remains an inherently human responsibility.
- **Human Judgment**
Culture, ethics, and nuance require a human perspective that AI cannot replicate.
- **Greater Context**
Humans will always understand more of the organization's broad context, real-world circumstances and member concerns
- **Final Decision-Making**
Your board has the last word on what your organization's goals and direction will be. Full stop.

Priority-setting is human judgment. Full stop.

Where AI Can Help: In the Room



Keep board discussions at the right depth

Review transcripts to ask: Is this too high-level to be actionable, or too task-focused to be strategic?

Use the answers to right-size the goals



Pressure-testing an idea

For a given idea, ask: "What's the best outcome? What's the worst outcome? What aren't we thinking of?"

Use the answers to refine the discussion



Identify resource gaps for execution

Use AI to define ballpark requirements for budget, time, staff allocation and identify mismatch with goals

Use the response to prioritize resources



Synthesize themes

Between discussions or with a notetaker, ask to synthesize what's been said so far, similar to how a facilitator might work.

Use the response to finalize topics

Beware the Slop Grenades



- AI hallucinations
AI can generate things that sound confident and polished but aren't actually accurate
- The "Slop Grenade" effect
Pushing those ideas straight into a board conversation without sufficient review is a "slop grenade"
- Judgment over generation
AI can't shortcut judgment, it can only inform it. You still need time to carefully consider AI outputs.

Exercise 2: In-the-Room Facilitation Tactic



- Exercise 2 materials
QR code or <https://beacontechresearch.com/nextwave>

Exercise 2 materials at the link above.

Bottom Bun: The Follow Through

Arguably the most important part!



The Binder Problem, Revisited

Why strategic planning often fails



- Too lofty and disconnected from reality
Plans that lack grounding in day-to-day operations and functional limitations.
- Too specific, a task list with no real strategy
Plans that focus on execution without a clear overarching vision or strategic direction.
- The Board-Staff tension
The divide between high-level vision and granular staff execution is where plans break down.

A plan is only as good as whether it changes what people actually do Monday morning.

Where AI Can Help: After Planning



- Turning broad pillars into concrete action items and owners
- Creating SMART goals
"A goal properly conceived is halfway met" - Zig Ziglar
- Suggesting KPIs and realistic baselines
- Drafting check-in meeting agendas tied to progress
- Building in a periodic reality-check
Plans go stale fast when the environment shifts (a funding source dries up, a key partnership ends, your membership base shifts)

Quick Peer Discussion

Aligning Daily Tasks with Strategic Goals



- Does your recent work connect to a strategic priority?
Reflect on current project tasks and their impact on organizational objectives.
- How do you know?
Identify the metrics, feedback, or project milestones that confirm this alignment.



©2026 Proprietary and Confidential. All Rights Reserved.

Exercise 3: Operationalize a Real Plan

Practical application of operational strategies

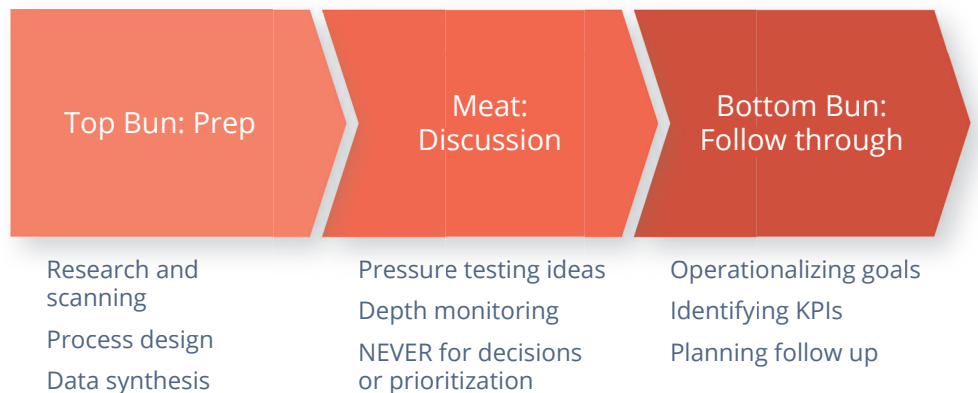


- Exercise 3 materials
QR code or <https://beacontechresearch.com/nextwave>

Exercise 3 materials at the link above.



The Burger, Revisited: Process Takeaways



Key Takeaways for AI in Strategic Planning



Use AI where it's useful

Identify specific areas where artificial intelligence provides genuine value and efficiency.



Know where it isn't

Recognize the limitations and scenarios where human oversight or traditional methods are superior.



Beware the slop grenades

It's easy to over-rely on AI in our busy world. Be thoughtful about the level of review and judgement needed.

If you're going to use AI in your strategic plan, do it right.

Questions?

Vanessa Dennison, CAE, CBAP
Principal
Dennison & Associates
vanessa@dennison-associates.com
www.dennison-associates.com
Seattle, WA



John Hooley
Owner
Site Steward
john@site-steward.com
www.site-steward.com
Portland, OR



BEACON
TECH RESEARCH