



Review: The Executive Guide to Facilitating Strategy
By Michael Wilkinson
January 2012

Reviewed by Jonathan Poisner, www.poisner.com

I previously reviewed Michael Wilkinson's book, *The Secrets of Facilitation*. I felt the book was an excellent source of ideas for both novice and experienced facilitators.

I was excited to read Wilkinson's subsequent book, *The Executive Guide to Facilitating Strategy*. Once again, the book didn't disappoint, although it had a few blind spots.

Wilkinson aims to present a comprehensive guide to the process of strategic planning, applicable to a wide range of institutions, from for-profit, to government, to nonprofits. He also suggests the process applies to organizations from the largest to very small.

My bottom line assessment: the book provided this reader a few insights that are worth sharing for those who like me aim to help nonprofit organizations thrive. Those hoping to manage or play a significant role in strategic planning would benefit from reading it.

Clear Definitions

The book does a superb job offering up clear concepts to divide the stages of strategic planning, including useful definitions for such common terms as mission, vision, goals, objectives, and strategies. While you do not have to adopt Wilkinson's definitions for specific words, I think he's right that you need to use *some* word for each of the concepts invoked by Wilkinson.

Establishing Goals and Vision before Mission

Strategic plans tend to get laid out in a logical manner, which leads to a tendency to put together the plan in the same order. I came away from the book convinced that Wilkinson is correct to suggest organizations first define their goals ("broad, long-term aims that define fulfillment of the mission") and vision ("a picture of the preferred future – it's a statement that describes how the future will look if the organization fulfills its mission.") before then going back and asking: given our goals and vision, what's our mission ("a statement of the overall purpose of an organization that describes what you do, for whom you do it, and the benefit.").

Breaking up the Process into Multiple Planning Retreats

My initial experiences with strategic planning tended to set up the process by asking: do we do a 1 day retreat or 2 day retreat? The starting premise was that the planning retreat should happen during an

uninterrupted time period. While there are logistical reasons for nonprofits to do this (it's easier to guarantee consistent participation throughout the planning process), it raises significant challenges for many organizations.

Yet, Wilkinson rightly points out that there really are two distinct phases to strategic planning: Setting Strategic Direction and Implementation Planning.

Time and again, I've experienced situations at a nonprofit planning retreat where decisions are made setting the strategic direction and then things bog down in implementation planning because the group lacks information about some of the new ideas that were generated in the first part of the retreat.

By holding a first retreat to set the strategic direction, letting some time go by for action teams to do some homework, and only then coming back together to discuss implementation, it allows for a far more effective process. I'm inclined to agree that the benefits of this outweigh whatever disadvantages come from trying to gather nonprofits boards twice within a 4-8 week period.

Critical Success Factors and Barriers

One of the other ideas in the book that was new to me was the importance of explicitly identifying critical success factors and barriers **after** setting goals and objectives, but before setting strategy. Too often, organizations create a laundry list of strategies without rhyme or reason, making prioritization difficult. By first identifying what conditions need to take place to succeed (critical success factors) and what barriers exist, you can then more clearly see why every strategy should either directly achieve an objective, create a critical success factor, or address a barrier.

The Book's Weakness

The book's ambition is its greatest strength and greatest weakness. As a strength, the comprehensiveness exposes readers who're more versed in one sector with ideas and processes that have proven useful in another. As somebody whose primary background is in nonprofit management, I found some of the for-profit examples cited intriguing. Yet, at the same time, the book suffered in the long run from paying insufficient attention to how smaller organizations could adapt the process to their reality (eg. significantly less time available for planning, both by staff and board members). Wilkinson suggests a level of time investment for small organizations that is greater than I've ever seen a smaller organization commit. He may well be right that organizations would benefit from doing so, but little attention is paid to either (a) how to make the case for the greater investment, or (b) how to streamline things significantly if necessary. To be sure, he offers up a few nuggets on the topic, but I came away begging for an entirely separate chapter on the subject.