



A Planbook for the Future

Here are the steps to help you get more of what you want done.

By Paul Lemberg

You're pursuing a strategy en route to your vision. Whether it's revolutionary or evolutionary doesn't matter. You're on the road, driving in a direction of your own choosing. The important thing is that you have, in fact, chosen this course.

And, once you've made this choice, how are you to realize this strategy? The answer is just like the answer to "How do you climb Mount Everest?" One step at a time. The trick, of course, is to know what steps to take. This article details steps to a strategic, tactical plan.

Review the Past

The first step is to review the past period. For the balance of this article, we'll refer to that period as a year, although your planning horizon may be longer or shorter. You need to review the past for two reasons:

First, it's crucial to learn everything possible from your previous actions, results, and mistakes.

Second, you can pinpoint issues still hanging over your head. You need to let those issues go so that they're no longer a burden, a distraction, or a hindrance.

To complete this review of the past year, answer the following questions:

At the beginning of the past year, what were your intentions? What were your goals? What did you set out to accomplish?

Which intentions did you take action on? Which ones did you merely talk about?

Specifically, what did you actually accomplish? How effective were you? What percentage of your goals were realized? For instance, if your goal was \$14 million in income and you reached \$12 million, you were 85% effective.

What did you accomplish that you didn't intend? What were the unintended side effects?

In your opinion, what did you do "wrong"?

What did you simply skip?

One useful practice is to write a detailed, objective history of the past year. Document the year's events and results in journal form. Your records will be a big help. Use your date book and your ledgers to reconstruct this narrative.

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Gather up whatever you learned. Three questions assist you in this phase:

What did you do that worked? In other words, what actions produced the results they were intended to produce?

What didn't work? What actions (or lack of actions) produced something other than the desired result?

What was missing? Were there missing resources, skills, knowledge, attitudes, or relationships which, if you'd had them, would have enabled you to be more successful?

At this point you should be ready to move forward without dragging the past with you.

Set Priorities

Using your values, beliefs, vision, and strategy as a guide, establish priority issues for the coming year. Presuming your resources are limited, you may not be able to impact all areas at once. Take a look at the following list. In which of these areas do you most want to make a difference?

- program development
- market penetration
- donor relationships
- global impact
- new customer growth
- employee retention
- state-of-the-art technology
- productivity
- new income
- customer satisfaction
- board recruitment
- geographic expansion
- community impact
- strategic relationships

Add other areas to the list. Then choose which you'll focus your attention on. Some prioritizing questions to ask are:

Which area is most important? Which will move you forward in the direction of your vision and goals?

Why is that area important?

What will a shift in that area provide to the organization (or specific categories of stakeholders)? What will not causing that shift cost the organization?

Create Measures & Goals for Each Priority Area

Once you've decided where you'll focus your efforts, it's time to establish measures for success. Here's where things can get tricky. The standard approach is to "look around" and try to figure out what's practical: "We did X last year. Well, we know how to do an extra 10%. So that's what we'll shoot for. We'll do X plus 10%."

The catch with this approach is that it will get you incremental, average results. And while there's nothing wrong with average results, you want extraordinary, breakthrough results. That means you have to step outside your normal confines and dream a little. Ask:

What will move us rapidly toward our vision?

What will quickly implement our strategy?

Set success measures that will inspire you! Don't think about how you'll achieve the measures or goals before you set them. That will only limit your thinking.

Establish a clear set of measures and goals for each area of focus. For instance, if geographical expansion is a top priority, your goal could be to expand into Canada. If it's board recruitment, success might be to add a new board member with financial expertise. Employee retention would be impacted by reducing turnover from 14% to 5% and providing 50% more training days for employees.

Place a time frame on each measure and turn it into a goal. "Increase total donors 10% by September 30" is a clear-cut goal. It fits nicely on the end of a timeline.

Create Initiatives

You have measures, you have goals. Now develop a plan to reach them.

For each measure within an area, invent one or more initiatives that will help you reach your goal. Sometimes achieving the goal will require a series of initiatives or a set of parallel initiatives. Increasing the donor base by 10% may involve direct mail, print and web advertising, e-mail, social media, and a phone campaign. Each of these initiatives then requires its own measures for success. And each one must be evaluated in terms of suitability, costs, and likelihood of success.

Develop Action Steps, Milestones, & Timelines

After you've chosen your initiatives, it's time to do the following:

Break each initiative into action steps and intermediate results.

Create a timeline for each of these steps and results. Include acquisition of missing resources and skills on the timeline.

Set regular milestones to keep the whole effort on track, and have a way to blow the whistle when things get off course.

Develop a tracking system, and update it regularly and often. You can use a big white board or flip-chart paper taped to the wall to display your timeline. Be sure it includes

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measures, milestones, and people's commitments of what they'll accomplish each tracking period.

Project-management software is useful for complex initiatives: It helps you visualize and account for "dependencies." If you use it, e-mail reports to all participants.

Adopt the Merlin Method

For some of your areas and measures of success, you're clueless: You simply have no idea how to achieve the results. In this case you can use the Merlin Method. Merlin, you may remember, was a magician and prophet who served as counselor to King Arthur. What you may not know is that Merlin didn't really predict the future. Legend says Merlin was born as an old man and lived his life growing younger. He was simply relating events which for him had already happened.

The Merlin Method is based on this same principle. Imagine you're standing at the end of a long timeline: You've already achieved your specific goal. Visualize how you did it. What actions did you take? What resources did you secure? Whose help did you enlist?

Ask these questions in a stepwise fashion starting from the end:

What was the last significant thing you had to do just before reaching the goal? Put that on your timeline.

And just before that, what did you have to do?

And just before that? And so on, moving closer and closer in time, right up until the present.


If you were taking a family trip, imagine yourself at your destination. What did you do just before you got there? You exited US 10 at exit 54. And before that? You exited US 15

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at Riverside, having driven 67 miles. And before that, you bundled the kids into the car. Before that you put the luggage in the trunk. Before that you packed. Before that you went online and got directions. And so on. Working backwards from the realization of the goal, you've developed a timeline, complete with milestones – working from your collected knowledge and wisdom but not necessarily from your conscious mind. The Merlin Method is a powerful way to generate tactical actions to realize your strategy.

For a reality check, think it through forwards. If you add the necessary resources, skills, and knowledge, take each action in turn, and reach each milestone, is that likely to produce the results you intend to produce?

You can even use the Merlin Method to generate alternative plans to evaluate against your other approaches.

Using one or more of these methods, you've developed a strategic and tactical plan. You now have a complete set of strategic priorities, measures, goals, and initiatives, along with action plans, milestones, resource requirements, and timelines – built upon your strategy and designed to realize your vision. 

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Stay on the Right Track

Don't just make a plan. Keep it in front of you every day. For inspiration and actionable tips, see these articles at NonprofitWorld.org:

Can a Small Organization Create a Good Strategic Plan?
(Vol. 40, No. 3)

Your Future Just Walked in the Door – Or Out of It
(Vol. 18, No. 4)

What Nonprofits Need Are More Left-Handed Planners
(Vol. 18, No. 2)

Will & Vision: Keys to Advancing Your Organization
(Vol. 26, No. 2)

Is Your Organization an Opportunist? (Vol. 17, No. 3)

Prepared & Resolved: How to Become Future-Ready & Make an Impact (Vol. 26, No. 1)

Don't Give Up on Strategic Planning: 10 Keys to Success
(Vol. 22, No. 3)

Do You Know Where Your Goals Are? (Vol. 26, No. 5)

