

# INTRO TO STRATEGIC PLANNING AND GOAL SETTING

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# TODAY'S OBJECTIVES

*1- Learn what strategic planning is and why it is valuable to your practice*

*2- Learn how to create an effective operational plan with accountability and timelines*

*3- Identify practice-level and professional goals for the year and create accountability to achieve them*

# POLL QUESTION



# *What is Strategic Planning?*

Who and where are we today?

Where do we want to go?

How and when will we get there?



# Why is it Important?

- Creates a foundation for everyday decision-making and behaviors
- Creates the ability to be agile
- Creates efficiency, focus, alignment and shared goals
- Inspires action!



# SOME SURPRISING STATS

- Only 42% of American workers can identify their organization's Mission, Vision and Values
- 95% of a typical workforce doesn't understand its organization's strategy
- 86% of executive teams spend less than one hour per month discussing strategy
- **77% of successful organizations have an established mechanism to translate their strategy into operative terms and evaluate it on a day to day basis**



# How is this relevant if I am part of a large organization?

*These same concepts can be used in practice sites, clinic care teams, and even clubs and other organizations outside of your practice*

# WHERE TO START?

When do we talk about this?

Who should be there?

What about a facilitator?

What tools should we use?



- Involve as many stakeholders as possible, especially those who will be responsible for managing the implementation and the action plans.
- Involve representatives from top to bottom of an organization, to get buy-in and sense of ownership.
- If you are new to this process or want to remain neutral it may be wise to bring in a consultant.
- Without the element of measuring progress and achievement, a strategic plan is just a document to go into a file. Without focus and accountability it will not happen.

# MISSION STATEMENT:

A mission statement helps to formulate and formalize what your organization does, why it does what it does, and who it does it for. It can also keep an organization “on track” during decision making

**Why do we exist?**

**Who are we serving?**

**How will we improve our patients' lives?**

Examples:

Providence - As expressions of God's healing love, witnessed through the ministry of Jesus, we are steadfast in serving all, especially those who are poor and vulnerable.

Kaiser - To provide high-quality, affordable health care services and to improve the health of our members and the communities we serve

# VISION STATEMENT:

This is the “big” statement, taking into account what the ultimate goal for the practice is

## Where are we going?

### SAMPLES:

*Mayo Clinic will provide an unparalleled experience as the most trusted partner for health care*

*Sound Physicians: Our vision is to be the unmatched leader in improving quality and reducing the cost of health care for patients in the communities we serve*

# VALUES:

*It is not just about defining them, it is about LIVING them*

## SAMPLES:

Quality  
Justice  
Integrity  
Innovation  
Teamwork

Dignity  
Compassion  
Respect  
Honesty  
Excellence

Accountability  
Community  
Service  
Value  
Reliability



# TOOLS:

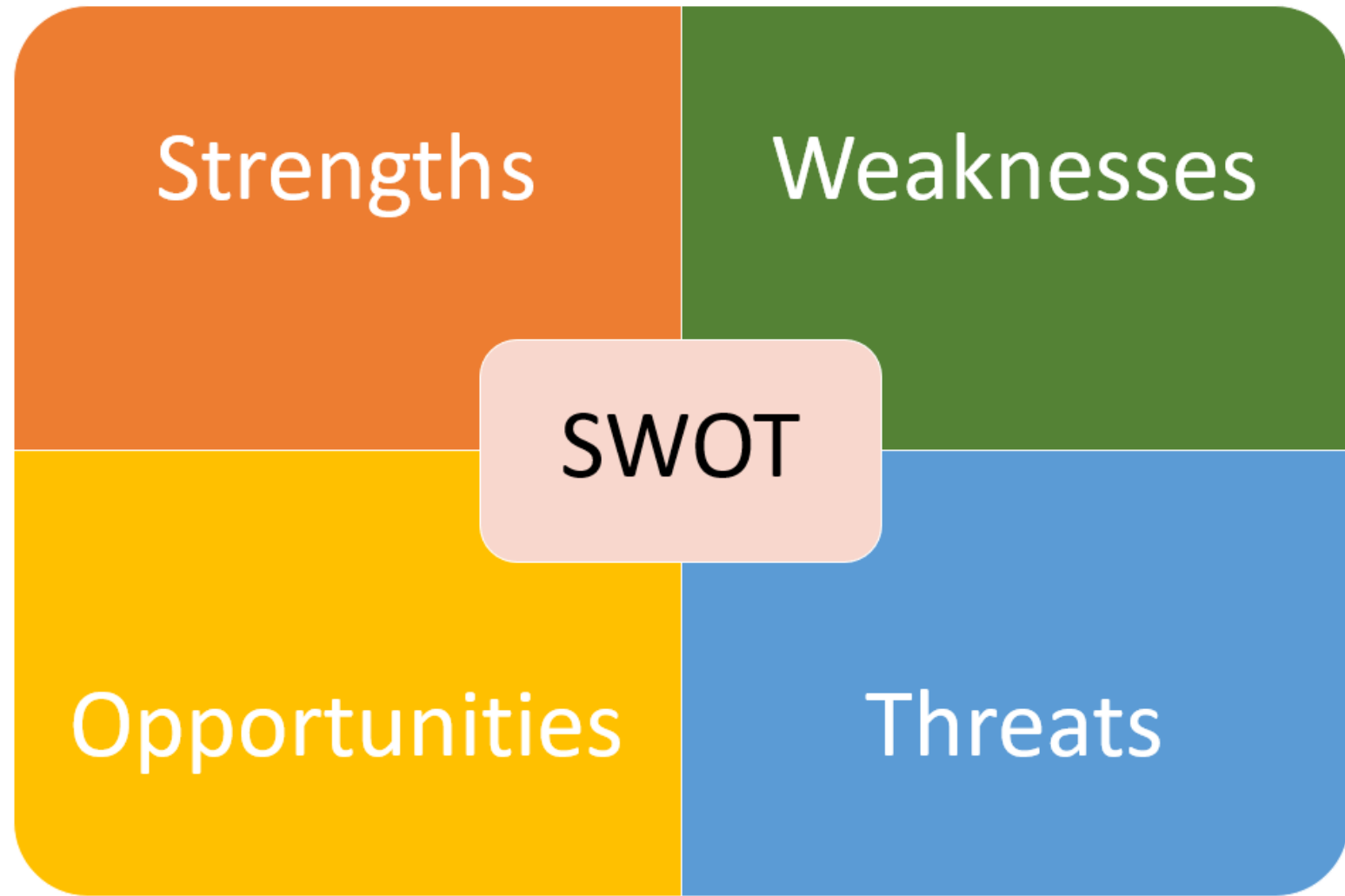


## VISIONING

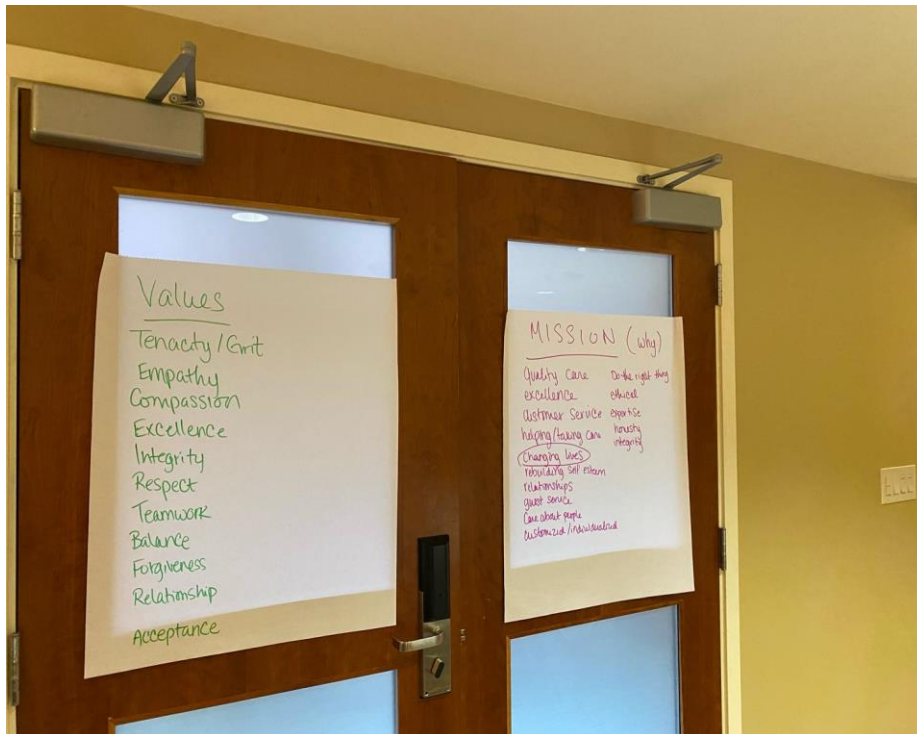


## BRAINSTORMING

A SWOT analysis will help you understand how you currently stand out in your niche, what will it take to grow your business further and what vulnerabilities and risks you should address.



# Get away from the office



## 2- CREATING AN EFFECTIVE OPERATIONAL PLAN WITH ACCOUNTABILITY AND TIMELINES



# Create Long and Short Term Goals

- Start by looking backwards – imagine you are 5 years in the future and 1 year in the future
- Identify gaps between where you are and where you want to be
- Identify the SPECIFIC action steps needed to move you forward

## QUESTIONS TO ASK TO DIVE A BIT DEEPER:

- . What will need to occur to bring about the change?
- . Who is responsible for the action items?
- . What is the timeline for the completion?
- . What resources (money, staff, etc.) will be required?
- . Which stakeholders need to be kept informed?

# WHAT IS A SMART GOAL?



Specific	Measurable	Attainable	Relevant	Time-Bound
Make sure your goals are focused and identify a tangible outcome. Without the specifics, your goal runs the risk of being too vague to achieve. Being more specific helps you identify what you want to achieve. You should also identify what resources you are going to leverage to achieve success.	You should have some clear definition of success. This will help you to evaluate achievement and also progress. This component often answers how much or how many and highlights how you'll know you achieved your goal.	Your goal should be challenging, but still reasonable to achieve. Reflecting on this component can reveal any potential barriers that you may need to overcome to realize success. Outline the steps you're planning to take to achieve your goal.	This is about getting real with yourself and ensuring what you're trying to achieve is worthwhile to you. Determining if this is aligned to your values and if it is a priority focus for you. This helps you answer the why.	Every goal needs a target date, something that motivates you to really apply the focus and discipline necessary to achieve it. This answers when. It's important to set a realistic time frame to achieve your goal to ensure you don't get discouraged.

# EXAMPLE:

***1 Year Goal: Reduce staff turnover from 20% to 10%***

## Action Steps:

- *Implement staff satisfaction surveys and create action plans to address concerns*
- *Hold monthly 1:1 meetings with key leaders and/or staff to assess team engagement, encourage communication and address concerns*
- *Create a formal employee engagement program*





# Fancy Apps for project management:

*Trello, OneNote, Asana, Smartsheet, Monday*

OR: Build an Excel Workbook with  
column headings – you can sort these!

## Domains from ACMPE Body of Knowledge: Financial Management, HR, Operations Management, Transformative Healthcare Delivery, Organizational Governance, Risk and Compliance

SAMPLE One Year Operational Plan						
Goal	Domain	Primary Accountable	Co-Accountable	Additional Resources	Additional Resources	Date Due
Calculate cost per day by office location	Financial Management	Ted		Justin	CPA	2/1/2021
Calculate ROI on potential PA hire	Financial Management	Chuck		Jen		2/15/2021
Research need for Certified Professional Coder staff position	HR	Jen		Executive Committee		3/1/2021
Schedule Leadership Team for 3 meetings per year with owners to discuss Ops Plan progress	HR	Jen		Jenn		DONE
Review medical records release workflows for compliance and efficiency	Operations Management	Yvette				
Implement plan for new NW Clinic: marketing, physician coverage, sub-lease	Financial Management	Justin		Courtney		
Post signs in exam rooms welcoming New Patients	Operations Management	Aubrey	Melinda	Laurie		
Identify quality metrics by disease state	Transformative Healthcare Delivery	Chuck		Jenn		
Schedule annual coding/chart review by auditor	Risk and Compliance Management	Jen				
Ensure PCI compliance for credit card processing	Risk and Compliance Management	Jenn		IT vendor		
Training and development plan launched for leadership team (Yvette, Melinda, Aubrey)	HR	Laurie		Aubrey		
Increase Per Visit value by 10% over previous 4 quarters	Financial Management	Physicians		Jen		
Implement policy for responding to adverse events	Risk and Compliance Management	Chuck		Executive Committee		
Implement regular reviews of Site Standards - 1x per year per location	Rick and Compliance Management	Justin				

# Getting the word out!



***If you want to ensure that all people in your organization are on board with the new strategy, you should be able to fit it into just one page***

## How to Create a One-Page Strategic Plan (**OPSP**)

- Include mission/vision statement(s) and goals (targets) – include long-term goals and from those the operational goals for the next year
- Answer the questions who, what, when, where, how, and why relative to goals/action plans
- Ask and answer the challenging questions: Should We do this? Why?
- List action plans and responsibilities, as well as timeframes

# 3- CREATING PROFESSIONAL AND PERSONAL GOALS AND ACCOUNTABILITY TO ACHIEVE THEM



## QUESTIONS TO DIG DEEPER –

- What happened in the past year in my career?
- What happened in the past year in my relationships?
- What happened in the past year with my personal growth and mindset?
- What happened in the past year with knowledge growth?
- What happened in the past year with health and wellness?

*How do I feel about this? What insight do I see?*

- What do I need right now and in the coming year?
- What's in the way?
- What will I eliminate?
- What will I do more of?
- What beliefs do I hold onto? – are they productive or not?
- What is the **one** thing I can do that makes everything else easier or unnecessary?

What are 5 things I want to **BE** in the next year?

What are 5 things I want to **DO** in the next year?

What are 5 things I want to **HAVE** in the next year?



# TO SUMMARIZE





Strategic planning and goal setting are important activities that can help you decide where you are going, who needs to come along and celebrate your arrival!



# POLL QUESTION

## **Our next workshop:**

How to Develop from Manager into Leader

Thursday, February 11<sup>th</sup> from 12-1pm

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