

Critical Success Factors

7 Critical Success Factors for Communicating your Strategic Plan

1. **Develop a Communication Plan that keeps on communicating** : It is a never ending story
 - a. Before development of Strategic Plan
 - b. during development,
 - c. Roll out of the Plan
 - d. and ever after/continuously
2. **Keep the plan focused, short, simple so the message can be simple and focused but deep in meaning.**
 - a. Limit the number of goals and link them to the Mission -why does organization exist. Focus on the shared purpose; on how each area contributes connection to day-to-day efforts.
 - b. Keep the plan strategic and avoid details that should be in the operational plans. This makes communication difficult.
 - c. Look at the language and avoid planning jargon and “corporate speak”
3. **Explain the Environmental Context and link it to goals**
 - a. Employees need to be in touch with market reality. The plan wasn’t developed in a void.
 - b. Explain that today strategic planning is a dynamic process that provides direction and guidance in an ever-changing environment. It is a blue print; a roadmap.
4. **Tell a story** Bring humanity to the plan.
 - a. Ask employees to share stories as well about how they see their role advancing the mission
 - b. How their area is benefiting patients, students, their stakeholders.
 - c. Use these stories to sell the behaviors you want and to sell the plan
5. **Identify Strategic Communicators (Messengers):** Not just Planners Responsibility! Not just the President or Dean!
 - a. Managers and don’t leave out **teams of employees** to serve as ambassadors etc across the campus.
 - b. **Identify key audience segments** and match the desired level of interaction and feedback needed:
 - i. *internal*: faculty, staff, schools, students and
 - ii. *external*: board, donors, alumni, and community, state and local officials etc.
 - c. **Develop key talking points as a resource, to ensure consistency of key messages and distribute to communicators.**
 - d. **Identify** appropriate **communication channels and platforms** for each audience segment:
 - i. **Use 21st century media: Like it!** web, social media, publications, blogs, face-to-face, employee huddles, town halls, posters, broadcast announcements, tabletops, banners, newsletters and SCORECARDS.
 - ii. **Brand it.** Use logos and graphics on Strategic planning documents and web sites
6. Employ balanced **scorecard and other tools** to communicate goals and progress (**Shari will say more**)
7. **Evaluate** communication plan **effectiveness.**
 - a. **Use employee surveys, focus groups, and feedback loops.**

Resource: HBR Blog Network. Eight Ways to Communicate Your Strategy More Effectively by Georgia Everse; August 2011

Tool Example - Using a Balanced Scorecard to Communicate the Plan

A tool that can be used effectively for communication is a balanced scorecard. A balanced scorecard is something that many of you may use but may not think of it as a key communication tool of the plan. The scorecard is a strategic management tool that identifies the key measures that track accomplishment of the strategic goals. The development of a scorecard tool needs to be part of the ongoing planning discipline and process, embraced by leadership, and linked to accountability. Additionally if you can establish the scorecard as the primary set of strategic goals that cascade down through the organization for faculty and staff and link it to annual review processes and incentive plans, it creates an

additional degree of importance. Once the scorecard is developed, it needs to be updated on a monthly and quarterly basis and communicated at least quarterly to key leadership groups. Posting the scorecard on internal web sites so it can be accessed by staff, physicians, and leaders across the organization is also effective. By communicating the scorecard on a regular basis, you can focus the organization on the strategic goals and priorities of the organization.

The scorecard we have set up has 5 focus areas and approximately 30 measures. We will be adjusting the scorecard over the next year for the next long term plan.

Challenges still exist in defining the right set of measures, not overdoing the number of measures, making sure measures are actionable at all levels of the organization, and making sure the measures reflect all of the missions of the organization.

Using the Balanced Scorecard as a Strategic Management System by Robert S. Kaplan and David P. Norton, HBR July-August 2007

Questions from GIP Members

Q: Do you have strategies for keeping all levels involved and engaged? It seems all levels are invited to participate during the initial kickoff but then never really hear again about progress, changes etc.

A: This is a common complaint but easily addressed. What happens is there is a lot of effort around the development stage and excitement around the big “reveal” once it is done, but then after the big show there is a letdown and very little engagement. That is why it is important to have a Communication plan with strategies for each phase: during development, during the roll out and continuously after that. PrePlanning: Start your leaders talking about the planning, what, when, who, why, and How long, etc. Set up your communication platforms: digital, virtual, face-to-face, publications etc..

During: To keep employees engaged you can use crowd sourcing apps that allow employees to comment 24/7- “IdeaScape”; blogs, dept meetings, town halls etc...

Post: To ensure buy-in it is important to let people know how the plan is progressing. How do you do that? Keep the plan in front of everyone. Use a scorecard. Each quarter the goals need to be reviewed and updated. Have leadership meet to review progress, discuss lessons learned and action items. Have managers give quick updates to their employees about goals and progress monthly & quarterly. This keeps participants involved and keeps them apprised of progress. Use your communication channels and tools appropriately.

Use your website for 24/7 access post scorecards quarterly updates: use a balanced scorecard to show progress to goals. Post it everywhere; Do this regularly. Each year must have an annual refresh/update and explain any modifications to the plan. **Key takeaway:** Planning is on-going activity as we said earlier never ending story with course corrections and modifications to the plan to be expected. That is a good thing. Developing a strategy culture is a multi-year process. It is an evolutionary and developmental process. In other words everyone will get better at it.

What is progress? What does success look like? Is it that all goals are met? What happens if you don’t make your target? If all of the goals were met well then maybe the goals were too easy not challenging? If a goal wasn’t met, why not? Well we use it as a learning exercise. Is it still a legitimate goal or do we have to go at it differently? Or do we have to change our strategy, responsibility, resources etc.?

Q: How can I best effectively overcome/mitigate the exasperation of stakeholders who’ve lived through strategic planning initiatives over and over and over again, to no avail?

A: Not sure what to no avail means? Is the organization/plan not being successful? Are the plans made and then never talked about again? Planning and plans are a never ending process as we have stressed. It is meant to happen over and over again because plans change and evolve. So educate stakeholders about the continuous planning process. Educate them on what they will see so their expectation is fulfilled.

The old write a plan and then put on the shelf never to be opened is so last century! Plans are now routinely updated and evaluated. **The solution in many cases is to overhaul internal communication strategies** in order to convince employees of the authenticity importance and relevance of the organization's purpose and strategic goals (HBR Blog). A plan should have short, mid- and long term goals. The various horizons will allow you to *communicate* about success and milestones achieved along the way. Also there will be plan modifications and opportunities *to talk about* those changes and why. We accomplished a goal and need to replace it or change the target. Etc. Changing plans shows agility of an organization to market challenges.. Along the way we communicate wins, or milestones achieved. We talk about targets missed and how we are changing course. We use that scorecard. Schedule leadership to talk about objectives and progress on goals all the time. We also learn how to write better goals to be clearer and to achieve the move the needle Key Performance Indicators. Planning is a developmental and evolutionary process, therefore communication includes education to build strategic planning competency in your organization.

Q: I am interested in strategies for managing research faculty fears and skepticism about strategic planning; including concern that even processes that include faculty participation are still seen as top down mandates.

A: So let's talk about the "fear and skepticism" first because that colors everything. You have heard "Culture eats strategy for lunch". Being aware of the reasons people resist change will help you implement change. What is common is the fear of the unknown, a mistrust and intolerance for change.

Help eliminate most of this by letting affected groups know as much about the changes coming and how they were made. Did they actually have representatives on the planning committees? Are those reps doing their job of reporting back what is happening and getting input broadly and feeding it back into the process?

Inform them of the process (the timeline, the groups and reps) and how they can participate to get their ideas incorporated. Show them how the plan does incorporate their ideas or goals. Then return often with progress to the goals. Remember leadership is about leading change. AS a leader you need to seek out and uncover potential resistance prior to implementing change so as avoid passive aggressive behavior, outright defiance hostility and sabotage.

A plan is made up of bottom-up and top-down initiatives. Unfortunately limited resources require hard prioritization and lots of very good ideas are competing for these scarce resources. Also not all ideas are created equal. What should be happening is that goals and initiatives chosen should be the ones that help the institution meet its major objectives.

Let's be honest some of our faculty and staff resist strategic planning and goal setting within their own domain. This happens when planning is not embedded in the culture, this will take time and constant fertilization. However everyone needs to take some responsibility and participation within their own sphere of influence. They must recognize planning' importance and build their own competency to gain credibility within their organization in order to champion their objectives effectively as leaders.

Q: We are launching our first strategic plan for diversity and inclusion. How do we ensure internal community engagement and prioritize what and when to send updates on outcomes?

A: Just as an organization's plan needs a communication strategy so does the DI plan. The principals are the same. Determine who the internal audience segments are? Who are the messengers? What are the platforms and channels? Ensure that communication channels stay open consistently. Ensure the objectives are concise so they can be memorable. Have you been communicating the purpose of the plan all along during the plan development phase or will this be: "Surprise!?" Have you had a campus wide planning effort? Has it been vetted with significant groups within your organization to elicit input? For example: Faculty senate, Student senate, Employee Advisory Groups, Key institutional leadership groups.

Is the DI plan clear? Are the goals clear, measurable, & time bound? A plan needs an environmental context the drivers and trends that highlight the reasons for the plan and its specific objectives. Most importantly it needs to be linked directly to the larger organizational plan how it is aligned and supports the larger strategic plan. Is DI a part of the bigger institutional plan?

Provide frequent progress updates. Keep a pulse on how people are feeling about the plan tactics? That will guide you in what your messages will be but always reporting on crucial plan outcomes is key. Depending on the horizon of the plan's goals they could be reported quarterly, semi-annually or annually. Use focus groups to evaluate communication and to evaluate progress of plan. The important point is to communicate progress and activities to remind people of the plan and what is being accomplished.

Q: How do we engage external URM community members who don't feel informed "enough" about the work and question "real" commitment to the strategic plan?

A: Let's assume there is "real" commitment, because if there isn't that is another story. And realistically there are always folks who feel they haven't been involved enough that may be true or not. Nevertheless, be honest with people about what has been done and what if anything will be changed in the future to be more inclusive – lessons learned. But let them know that engagement is critical throughout the process so even though the plan has been developed, they need to be a part of the execution and evaluation phase which will impact any course corrections that might occur.

So there is still lots of opportunity to be engaged. Because frankly, no plan is perfect and all plans are modified to some degree to stay on course. So prepare to deliver lots of information: Describe the process, the schedule, the goals, the responsible parties, and the progress. Give them facts about your current state and what is going to be the desired state. Share the plan, share the scorecard and dashboard. Institutional leaders will need to make presentations and statements to community groups to show their personal commitment and to describe what progress is being made. Are there appropriate community mechanisms deployed such as: focus groups, surveys, & appropriate community participation. Demonstrate how the plan objectives link and address community concerns. The environmental context needs to be presented to educate the community about the challenges and threats to the organization so as to explain the direction of the strategic plan. Then schedule regular reviews to show progress to these goals. It should include all the goals so that the community understands the whole picture and pressures for time, effort and resources.

Q: How do you succinctly communicate overarching goals across the institution and insure that organizationally, everyone is aligned with top priorities.

AND

Q: Recommendations to blending and integrating communications with overall School priorities?

A: Picking up from some of the critical success factors outlined by Rebecca, the ability to clearly communicate goals and priorities across the organization begins with the planning framework and discipline you have developed in your organization. It is easier to communicate the strategic priorities if the language regarding the plan is simple, clear and consistent. By not creating confusion about what is a goal, a vision, an objective, strategy, initiative, action, measures, targets, etc it becomes easier to communicate the organizations priorities. Sticking to the strategy language and framework is important.

We have adopted a framework that is available to all but primarily used with faculty and staff management and leadership, and we primarily communicate broadly to the organization without using those terms. We primarily use "goals and priorities" in our broad communications to keep it simple.

The plan is also easier to communicate if the goals and strategies are simply stated and concrete. We have been working over the past few years to limit the number of concepts and words in each goal and strategy statement. It is also important to limit the number of goals and strategies. We have held ourselves as an organization to no more than 5 long term goals and 8 long term strategies.

Another area to consider regarding clear communication of the plan is the time length of the plan. We have moved the length of our strategic plan to a 3 year plan during this last planning time line due to the rapidly changing research and clinical delivery environments. Three or Five year long-term plans are the most appropriate. The goals and strategies need to span the full timeframe of the plan to create consistent themes over multiple years. Sticking to the same goals and strategies for a sustained period of time makes communicating the plan easier and cuts down on confusion. It

allows you to get into a general rhythm regarding the themes you can communicate. We have found that we needed to move to annual major actions to make the longer- term strategies more actionable each year.

There are various methods to communicate the plan. 1) creating an internal webpage that includes the plan, measures, etc. 2) developing a graphic representation of the plan that is 1-2 pages that can easily be printed from the website or distributed via emails / listservs 3) creating a standard slide deck that leaders can use to review the plan with staff and faculty 4) including the plan in orientation for employees and faculty 5) including the plan in new leader classes for administrators 6) presenting the plan to leadership, town halls, Chairs meetings with updates and accomplishments on a bi annual basis 7) including the goals and priorities of the plan in communications through out the year. We have created a communication calendar that highlights various aspects of the plan through out the year. The intent is to weave the strategic priorities of the plan throughout communications during the year.

As stated before, the development of a balanced scorecard process and discipline is very useful in aligning goals and priorities across the organization. There should be one organization wide plan that then cascades down through the organization to the department level.

The second part of this question deals with blending and integrating communications with overall school priorities. The priorities of the school should be the result of the strategic plan and by outlining a communication plan for the school, the strategic priorities of the school can be highlighted throughout the year.

Turning Great Strategy into Great Performance by Michael C. Mankins and Richard Steele, HBR July August 2005

Q: Methods for stimulating excitement and investment in the plan and it intended outcomes.

A: Several activities or approaches can be used to generate excitement around the strategic direction of the plan. The first thing that is needed is to build the case for the need for the strategic direction. Weaving the external and internal dynamics AMCs face in communication activities is important. A burning platform needs to be created based on the environment. This creates the context for the plan and the need to establish the strategic direction.

Excitement is also achieved if a compelling vision is developed and effectively communicated. The vision needs to be stated over and over again by key leaders of the organization.

The ability to achieve key actions, create quick wins, and demonstrate accomplishments also helps to create excitement in the organization about the strategic direction and priorities. Examples could include investment in a specific research program that becomes successful in securing funding, recruiting key faculty, and eventually changing care for patients. Another example is demonstrated by our pursuit to improve our quality measures – it took an investment in people, change in processes, a changed culture, and patience. The need to do this was not only created by a need to provide higher quality care but also the changing environment that would impact reimbursement for services.

The ability to demonstrate the case for change, a compelling vision, and quick wins will help to generate excitement and future investment.

Q: What are some ways to incorporate storytelling? Is the message the same for faculty, students, staff, alumni and other audiences?

A: Storytelling is a great and effective way to make goals and strategies of an organization real for staff and faculty. Developing a set of stories for the organization and then tying them back to the strategic plan should be part of the communication plan. Stories can showcase people across the organization and can teach us something about our organization. The key is to recognize when the stories occur to make sure you tie them back to the plan.

Examples – the Ebola story for us can be used to demonstrate the impact in investing in infectious disease clinical and academic programs, partnering with the CDC, improving quality and safety of clinical services, and focusing on Magnet

designation and team based care. All of those strategic priorities came together in this one story. We were also able to demonstrate our values of caring, excellence, and integrity in this story.

Another story I just heard this past week was told by Dr. Robert Wachter of USCF. His new book highlights the story of a medical error and how that occurred. The story is not only about process improvement but about the strategic priority of the organization to create a fair and just culture and the focus to improve safety.

Developing a story for each area of the plan is a useful communication tool and something we need to do a better job of this next year.

I don't think the stories need to change for various audiences. You will need to alter the point you want to make through the story based on the audience.

Q: Do you find it takes full time FTE/staff dedicated to the specific task of ensuring implementation and communication?

A: A blend of resources can be used to develop and ensure the communication of the plan occurs. I think the Strategic Planning staff needs to be the driver and tracker of the communication plan. Part of the strategic planning discipline and management activities should be ensuring the plan is communicated effectively in the organization. This includes outlining the communication calendar and key messages.

We work with the internal communications office in HR to communicate the plan internally. We also work with the PR and Marketing departments to outline opportunities to direct communications around the strategic priorities externally.

Opportunities include internal websites, presentations at standing meetings, twice a year all leader meeting which highlights plan accomplishments and the plan for the new year (This meeting includes 200 staff and faculty leaders.), all organization emails, social media, orientation, training classes. It really starts with communicating with the leaders and holding them accountable to cascading the communication through their area.

Resources

Notes from Spring AAMC GBA/GIP meeting. Discussion group on communicating your strategic plan

Discussion Forum: Communicating the Strategic Plan

Challenges

- Culture of holding information, lack of transparency
- Communication through levels, top levels understand, how does it get down to all faculty?
Rely on faculty leaders to communicate
- Alignment between health center and school, not always clear communication
- Relevance to all missions
- Leadership Turnover
- Plans on shelf
- Have too many plans
- Silos

- Buzz Words not broadly understood
- Engagement – more than just communication
- Disconnection between the plan and operations
 - Finance
 - Progress against plan not communication
 - Law
- Losing momentum to keep communications up
- Not enough communication planning and slow process

Questions

- Active v. Passive?
- Communications folks role
- Continuity
- Losing momentum
- Vertical – Horizontal – Partners

Success

- Scorecard – easy to understand
- Posting on website
- Simple Plan (1 page, visual)
- Updates on progress – frequent messages
- Newsletters – include plan updates in existing communications
- Develop a culture toward internal communications plan
- Communication partnerships
- One page with “buzzwords” that become recognizable
 - E.g. Use all the time, “The Road Ahead”, “My Road Ahead”
- Added a pillar that speaks specifically to communication – and have metrics for success
- Re: organization and fiscal
- Leverage in-house opportunities
- Small document – more likely to be read
- Quick Polls to assess plan understanding - Survey Monkey
- Notion of Strategic Planning starting internal/external
- Trickle down communication – but don’t rely solely on this
- Celebrate, Town Halls
- Branding – carry communication plan through branding efforts
- Communications by Dean, leadership
- Early communications plan – during the planning process to get engagement/participation
- Linking Goals/Achievements with plan