

# Creating and Implementing Strategic Plans: The Future

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# About CFAR: Readyng Organizations for the Challenges of the 21<sup>st</sup> Century

CFAR is a **private management consulting firm** that helps leaders create organizations in which talent and innovation flow freely across the enterprise; people own the changes they need to make, and behavior is aligned with strategy.

CFAR was spun off from the **Wharton School** in 1987 with academic roots in business and the social sciences.

Our clients are **mission-driven organizations**—including universities, foundations, health and hospital systems, academic medical centers, family businesses, and Fortune 500 companies.

We **partner with our clients** to understand what is getting in the way of their success and provide tools, resources, facilitation, ideas, and insights that improve outcomes and performance.

**We help our clients...**



**Lead**



**Engag  
e**



**Act**

# What do we know about the future that will drive changes in how we develop strategic plans?

## **The world is turbulent**

We need to look beyond predictions.

## **The pace is accelerating**

We need engagement to propel ourselves from strategy to action quickly.

## **Technology provides new ways to communicate**

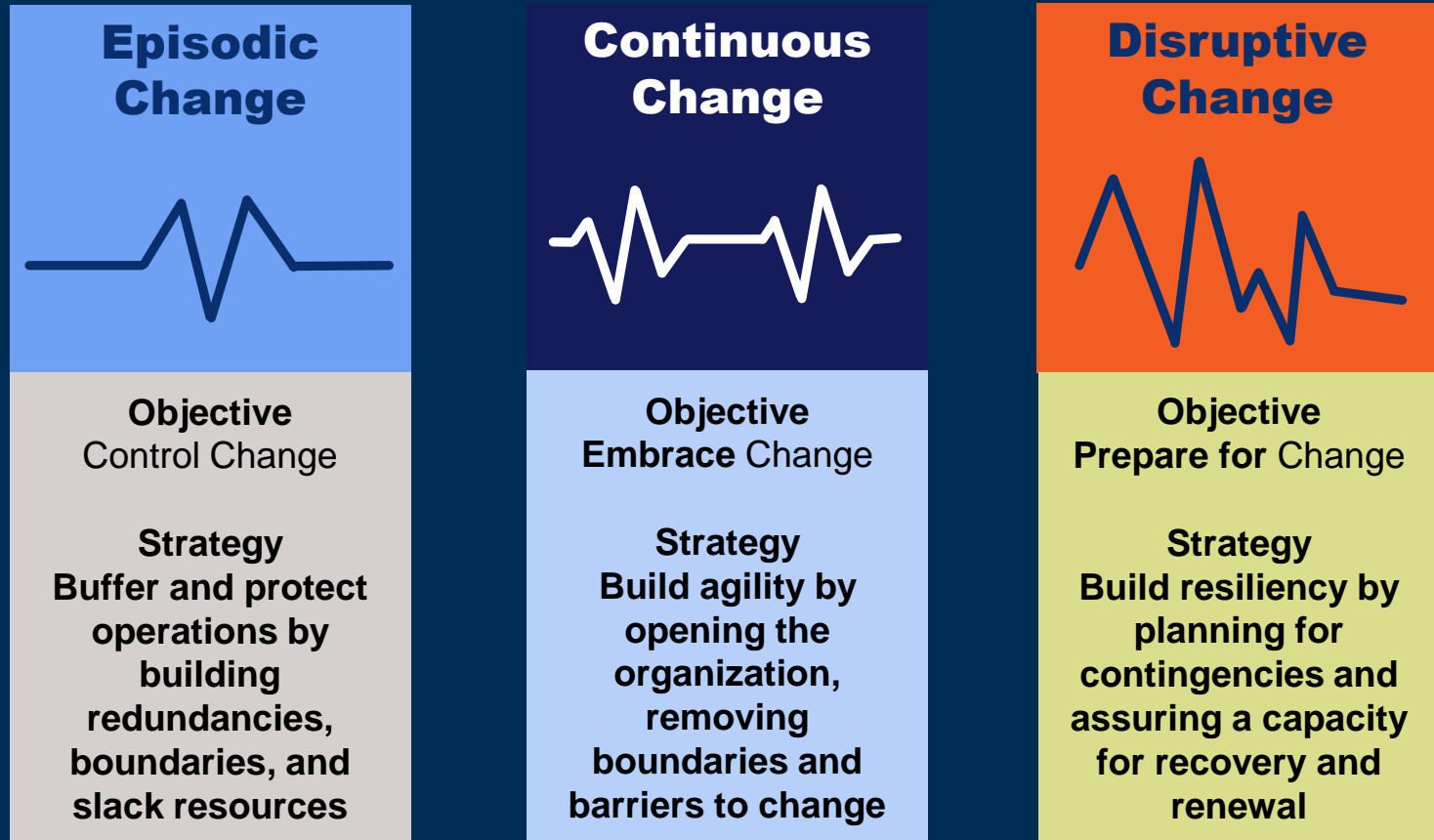
We need to ask the right questions.

## **We live in a networked world**

We need to develop a strategy that reaches beyond our organizational boundaries.

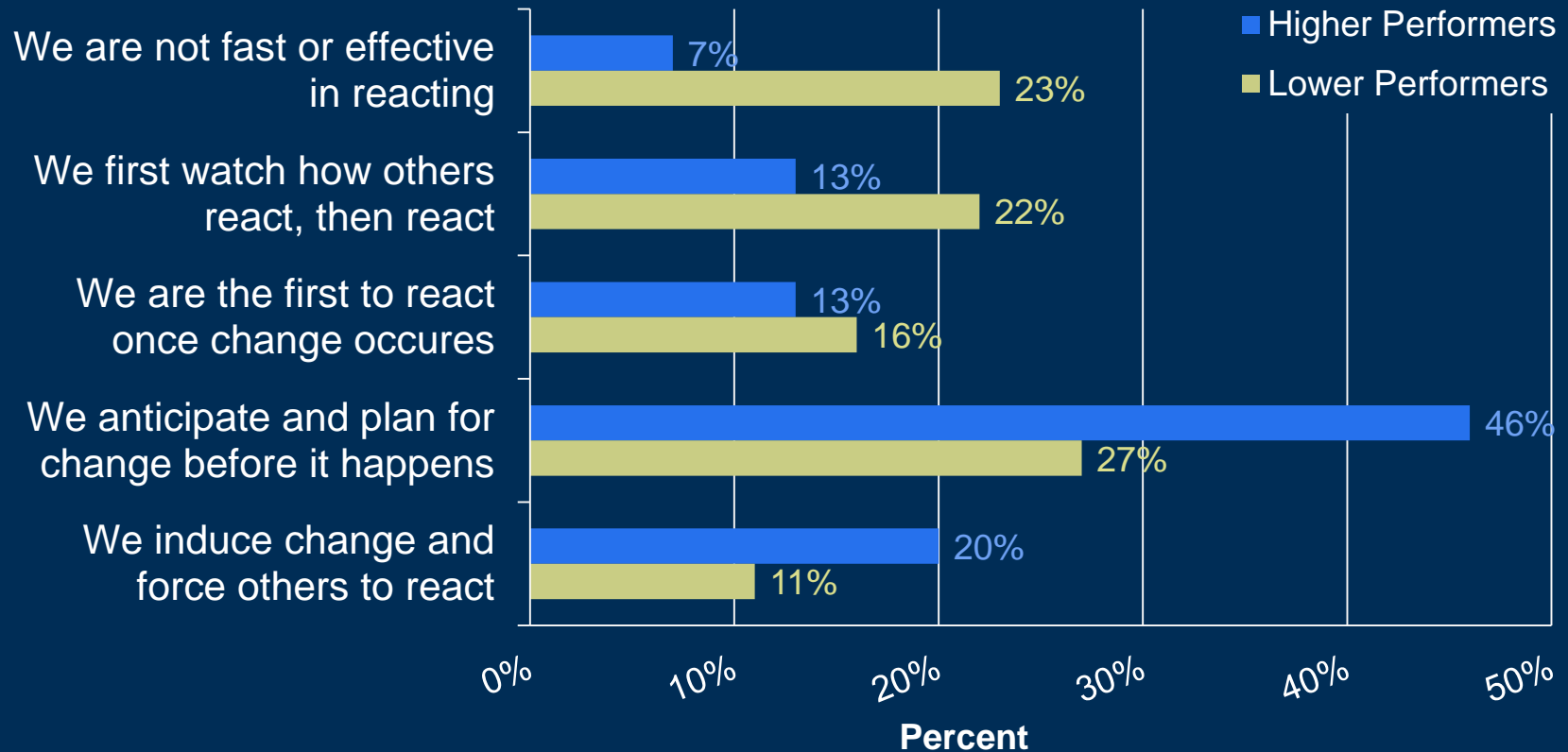


# Planning within Turbulence: The Changing Nature of Change



*Source: McCann, J.E. (2004, March). Organizational effectiveness: Changing concepts for changing environments. Human Resources Planning Journal, 42-50.*

# Planning within Turbulence: Organizational Postures Toward Change



Source: American Management Association/Human Resources Institute (AMA/HRI), (2006). *Agility and resiliency in the face of continuous change: Report of a global study of current trends and future possibilities 2006 – 2016*. New York: American Management Association.

# Scenarios Can Help Build Resilience in Thinking and Responding

There are **many kinds of scenarios**, and **not all help us address** the strategic **concerns** of academic medicine

# Scenarios: Look Broadly for Disruptive Possibilities

**Narrow and deep**



**Broad and shallow**



# Let's explore the disruptive forces we face in academic medicine

- Spend five minutes individually developing your own list of **'disruptive forces'**
- Turn to your neighbors and in **groups of two and three**
- **Share your lists** with each other—
  - *What common themes emerge?*
  - *What interesting outliers?*



# Scenarios not only need to look far afield, good scenarios also need to...

**Tell a coherent story** so that people can see themselves in the future.

**Consider the resources needed** so that the scenario is grounded in reality.

**Look outside** as well as inside the organization—so that they explore how the actions of others can affect you.

Scenario thinking **builds** organizational resilience



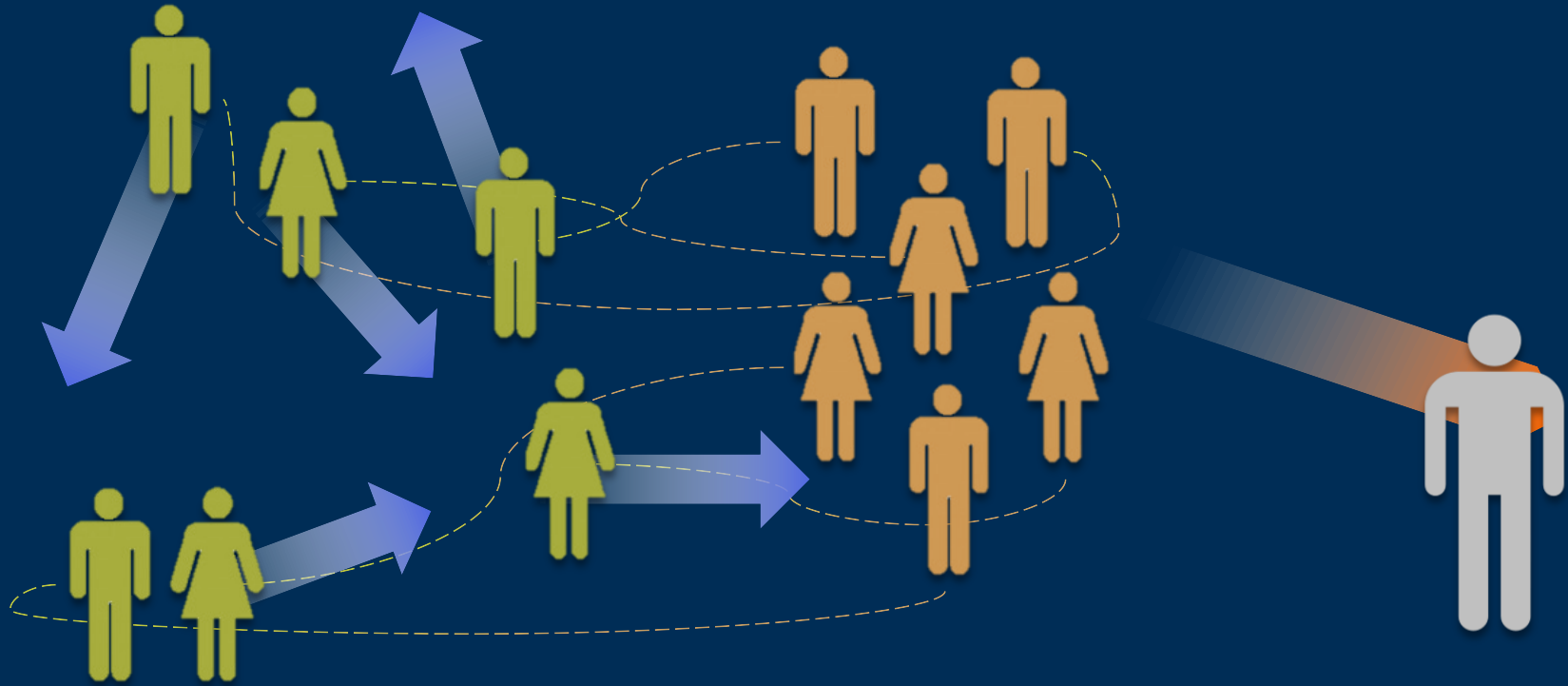
The pace is accelerating so we need to move from strategy to action quickly

The **plan** is **not** the purpose.

It is the **planning process** that **propels** us forward.

**Engagement in the development of strategy readies the organization to implement quickly.**

# Leading Leaders: Strategy When Every Leader is a Volunteer



The challenge is to **align the interests** of the top people when every one of them 'volunteers' their **talents and energies** to your organization.

# Who participates and how?

Participation must be **authentic**.

And there are **many ways** in which to participate . . .

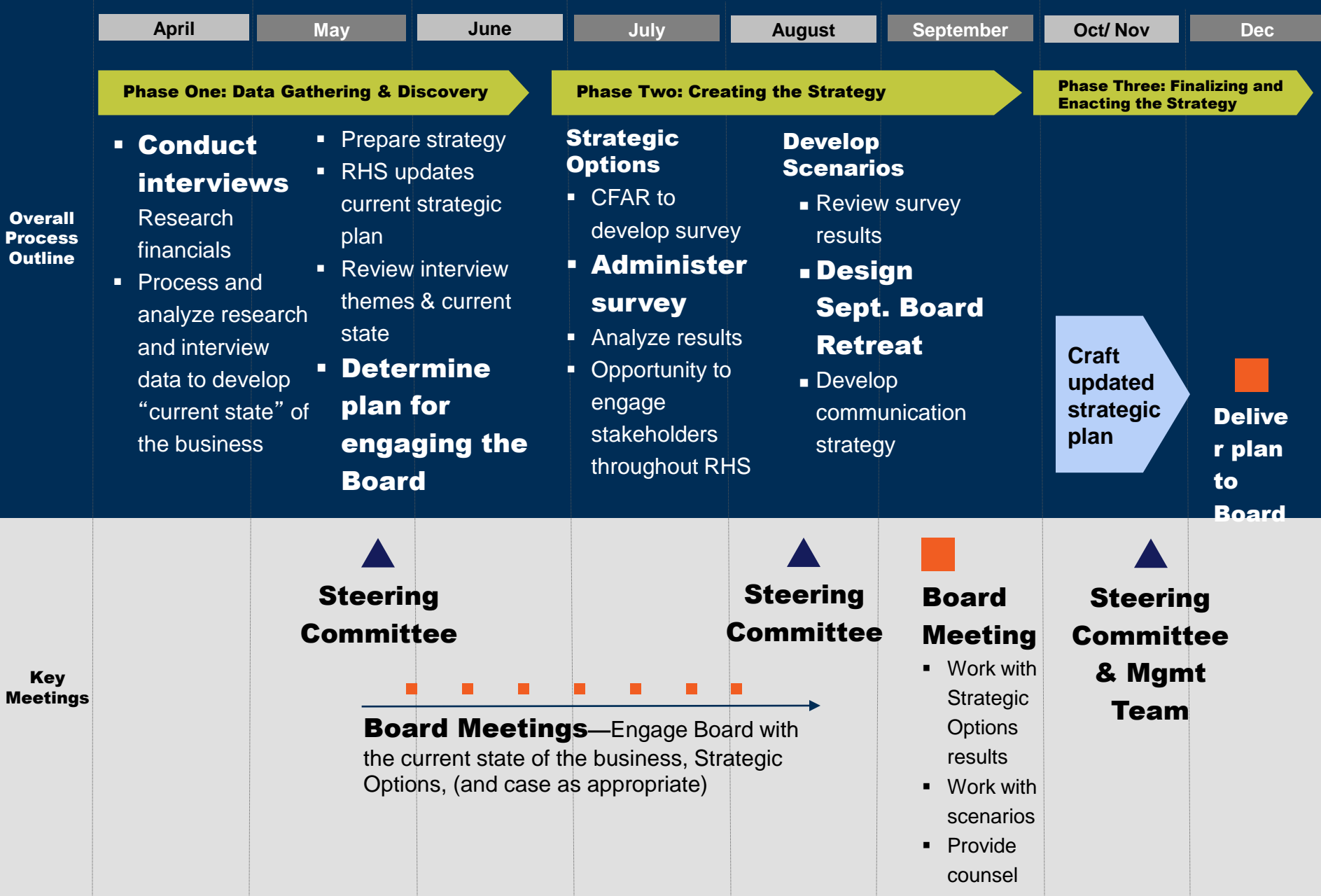
**Steering  
committee**

**Core group**

**Board**

**Other  
stakeholders**

# Regional Health System Proposed Timeline & Process for Updating the Strategic Plan

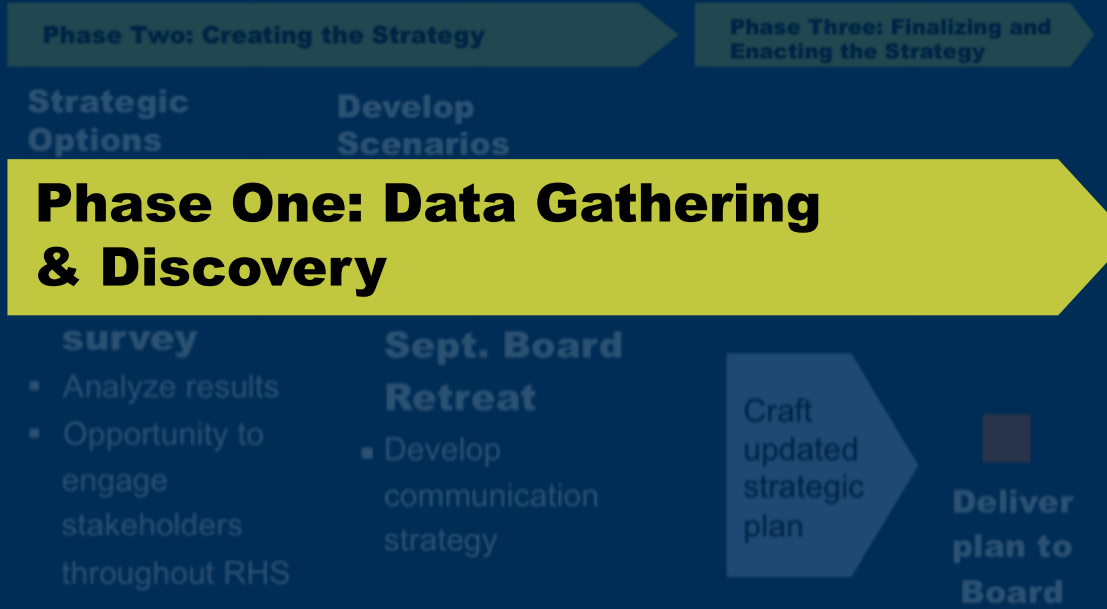


# Regional Health System Proposed Timeline & Process for Updating the Strategic Plan

**Overall Process Outline**

- **Conduct interviews** Research financials
- Process and analyze research and interview data to develop “current state” of the business

- Prepare strategy
- RHS updates current strategic plan
- Review interview themes & current state
- **Determine plan for engaging the Board**



▲  
**Steering Committee**

▲  
**Steering Committee**

■  
**Board Meeting**

▲  
**Steering Committee & Mgmt Team**

■ ■ ■ ■ ■ ■ ■ ■

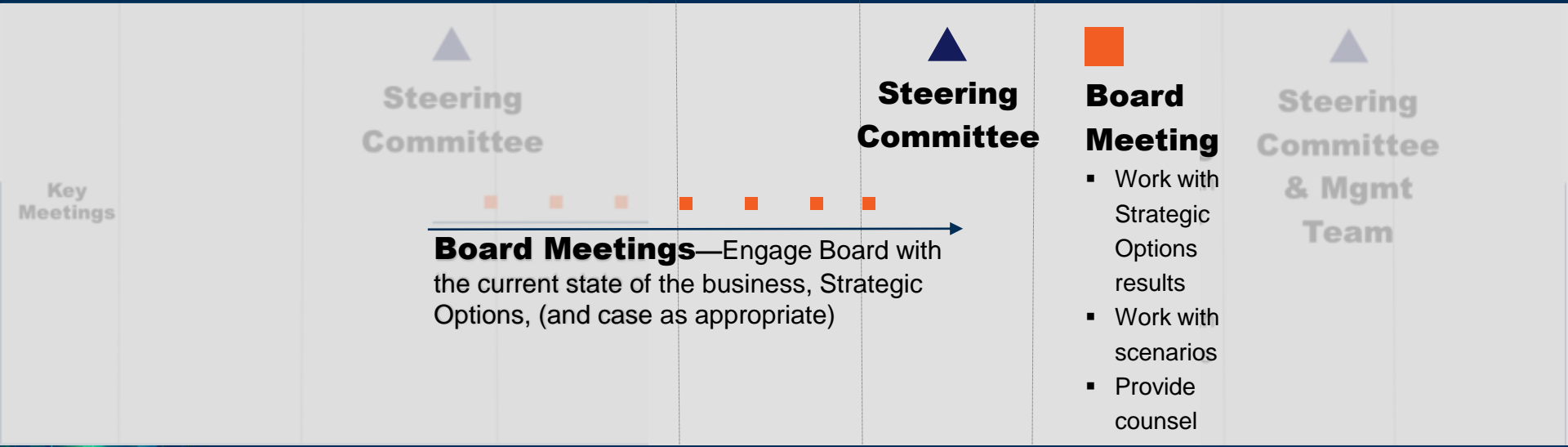
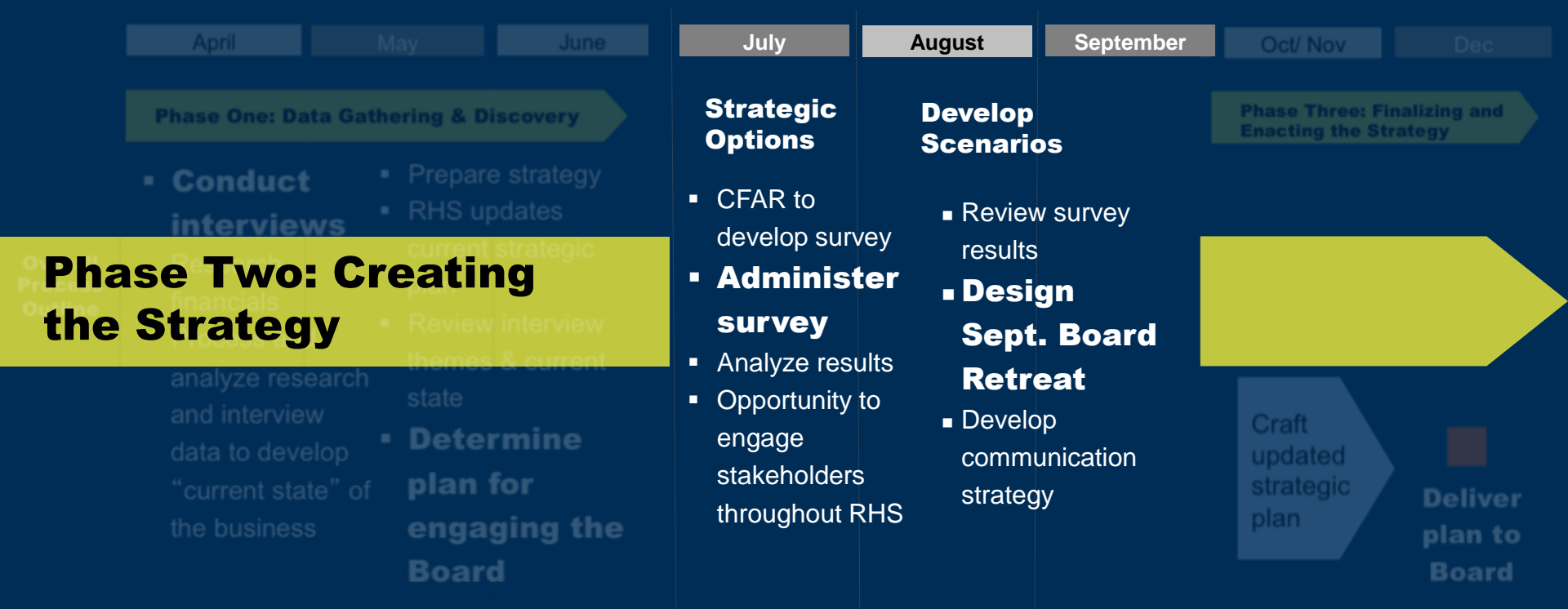
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**Board Meetings**—Engage Board with the current state of the business, Strategic Options, (and case as appropriate)

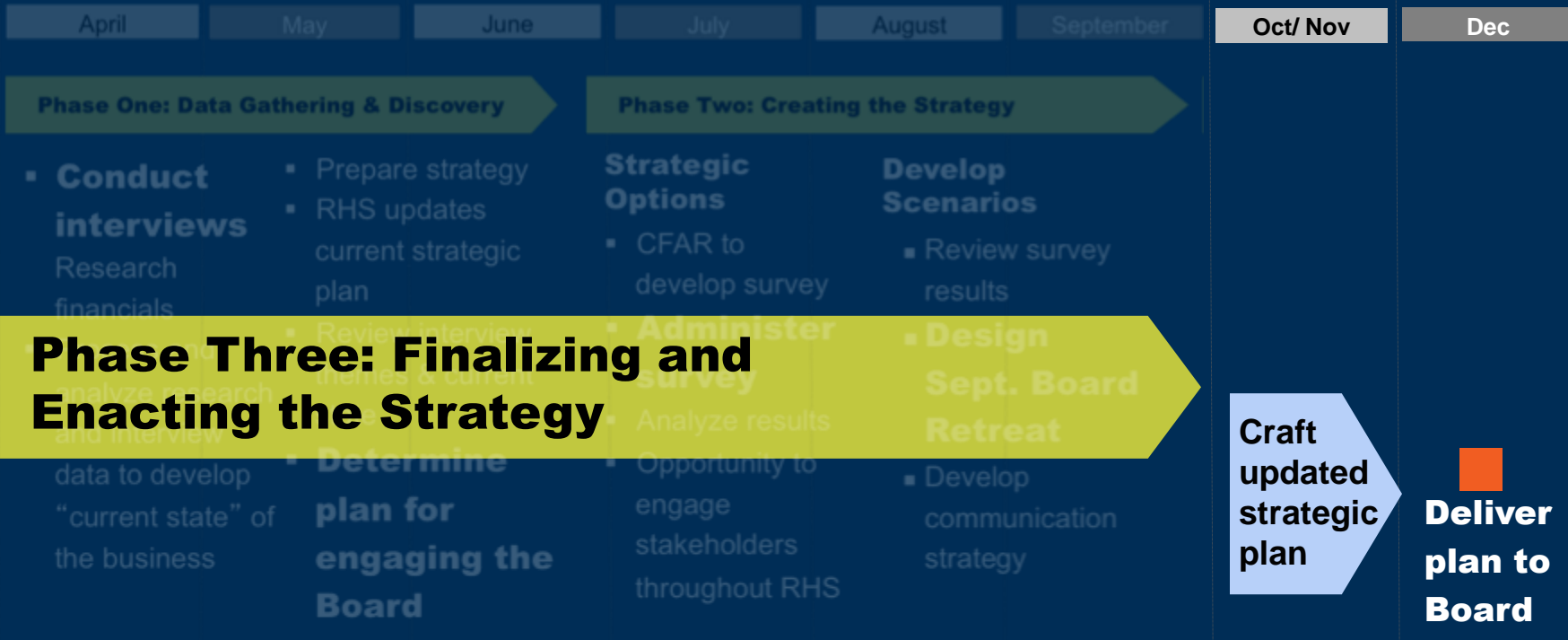
- Work with Strategic Options results
- Work with scenarios
- Provide counsel

**Key Meetings**

# Regional Health System Proposed Timeline & Process for Updating the Strategic Plan



# Regional Health System Proposed Timeline & Process for Updating the Strategic Plan





# Technology can help you communicate—if you ask the right questions



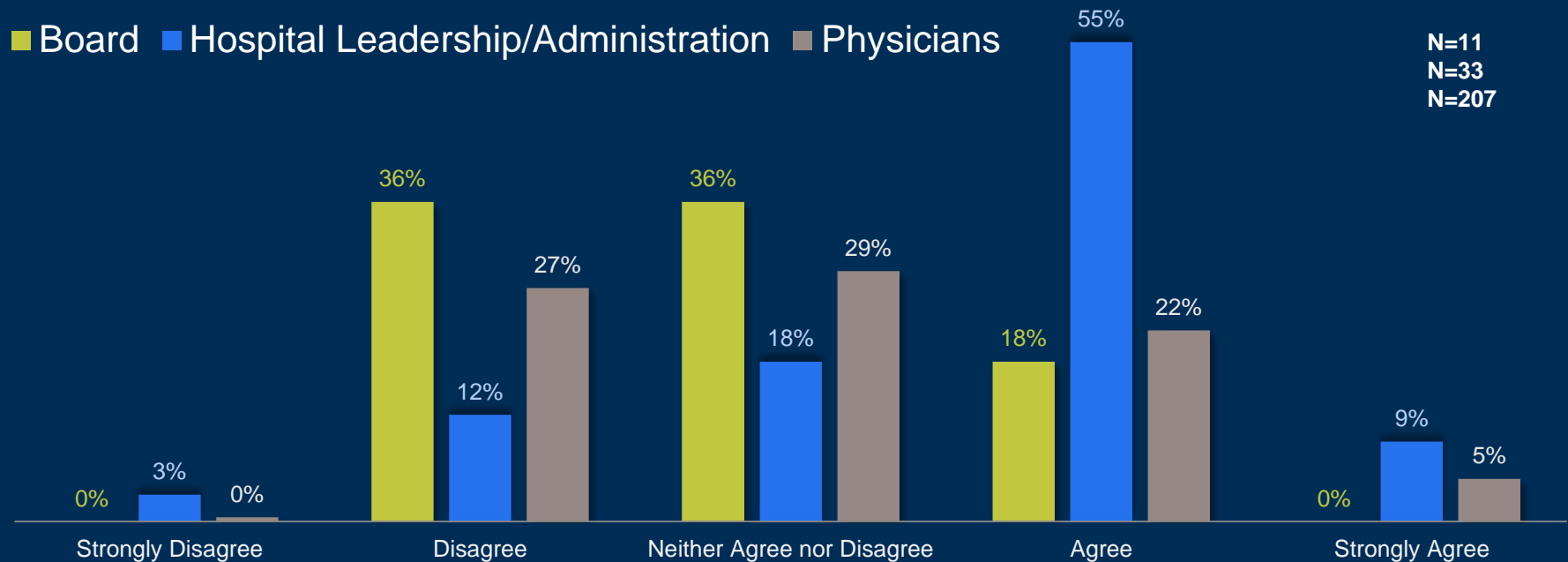
The challenge is not how to send a message about strategy—the choices are abundant...



The **challenge** is to have that **message pull people into the process.**

# Technology can help you learn the wisdom of crowds—if you ask the right questions

Tiered health insurance products will make us less competitive in the markets we serve.



Source: CFAR Strategic Options Survey and Stakeholder Interviews

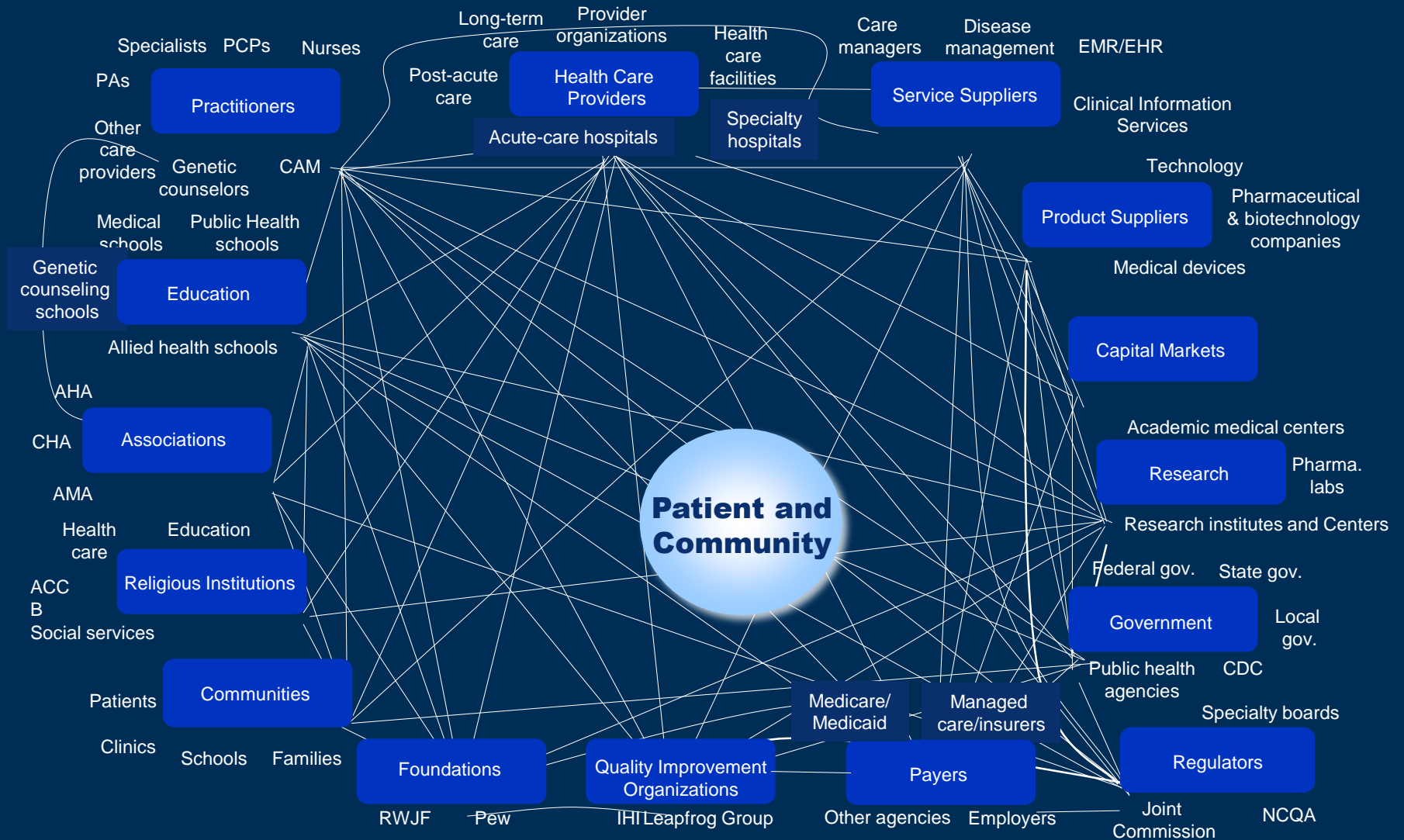
# In groups of two to three..

1. Identify two to three ways you could use emerging technology to **reach out to more stakeholders**
2. What might be some of the **barriers** you would encounter in getting their engagement?
3. What are two to three ways you can **acknowledge and reward participation?**

You'll have a chance to share some of your observations with the full group.



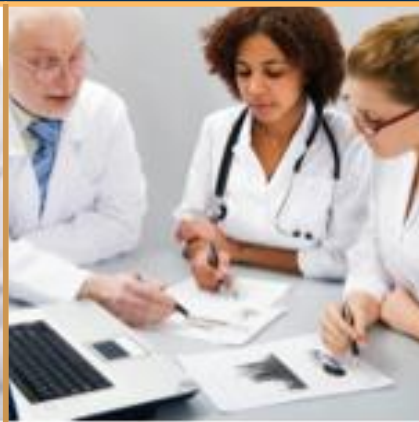
# Take a look at the Healthcare Ecology



# Our network and our partners affect our ability to live into our missions. For example, they shape our ability to ...



**Deliver  
clinical care**



**Provide  
inter-  
professional  
education**



**Advance  
our  
research  
agenda**



**Meet the  
needs of our  
community**

# Strategic planning for the future will require us to build resilient organizations

To **accelerate our reactions** to turbulence and disruptive changes

By **engaging people** through authentic participation

That can be **technologically enabled**

And considers **our network as well as ourselves**

So that we can **propel ourselves forward, moving from strategy to action quickly.**

**It's a great time to do strategic planning! Enjoy the ride.**



*Peter Vail and Greg Shea*





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Learn

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Serve

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Lead

Association of  
American Medical Colleges