10 Steps to Starting, Refining, or Refreshing Your Strategy Office

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Session Objectives

Define what strategy means
within the context of your organization.

Develop a plan
for establishing, refining, or refreshing a strategy office.

Develop a framework
for selecting and prioritizing strategic initiatives.

Resource Guide

A participant guide, including recommended tools and templates, is available to you by following the QR code.

1 Analyze Current State

What does **strategy** mean for your organization?

Where are the **gaps**?
- Organizational position & structure
- Gaps in roles
- Stakeholder analysis
- Need & opportunities
- Existing resources

Resource: Gap Analysis Template

WHAT IS YOUR PURPOSE?

② Develop or Refine a Purpose Statement

Why is the office needed?

What will the office do?

Who will the office serve?

Comparison of Purpose Statements

USF Health

The USF Health Office of Strategic Initiatives (OSI) functions as an internal consulting group to support and plan for organizational growth by providing services focused on operational effectiveness & efficiency, competitiveness, stability and longevity.

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The charge of the Health Care Transformation and Strategic Planning Department (HCT&SP) is to support JHM by coalescing a variety of essential planning activities. HCT&SP utilizes an integrated strategic planning process to identify forward looking goals, the strategies necessary to accomplish success, and the internal performance management system required to guide implementation and evaluate progress.
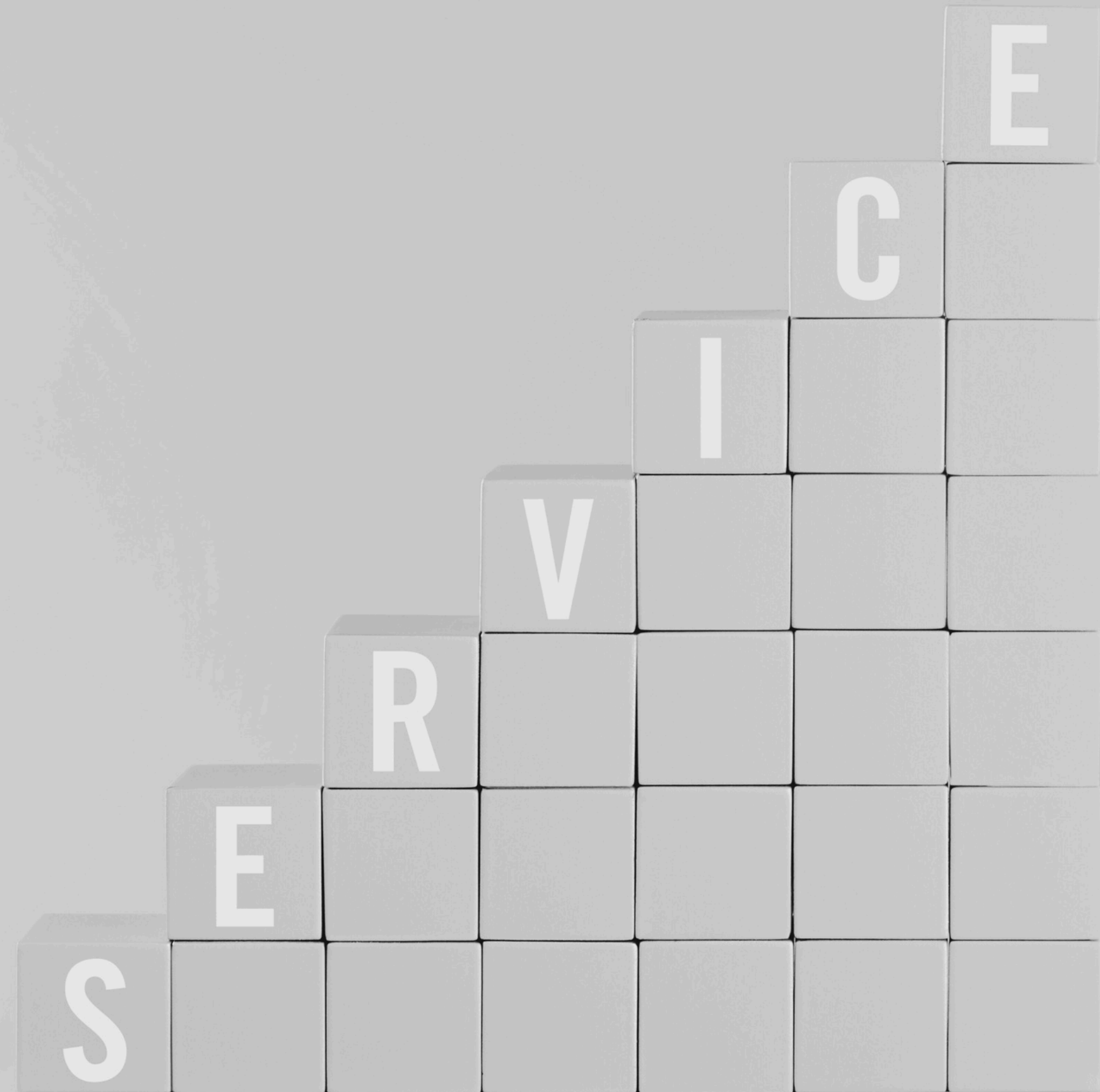
Resource: AI Prompt for Purpose Statement

Identify or Review Core Functions

3

What **core functions** will your office support?

What **services** will you provide?

What **change management model** will you use?

Comparison of Core Functions & Services

USF Health

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Core Functions: Strategy & Organizational Consulting

Services:

1. Formal Strategic Plan Development
2. Organizational Consulting
3. Strategic Space Planning
4. Change Management
5. Provision of strategic planning tools & templates
6. Strategy Development
7. Facilitation & Ideation
8. Operational Planning

Core Functions: Strategic Planning & Enterprise Performance

Services:

1. Formal Strategic Plan Development
2. Organizational Consulting
3. Facilitation & Ideation
4. Performance Assessment
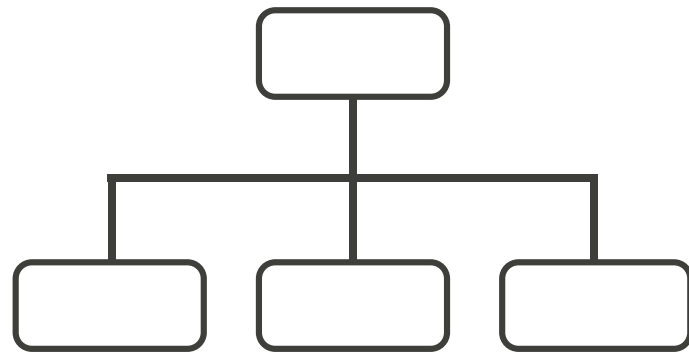5. Provision of Strategic Planning Tools and Templates

4 **Develop or Refine a Staffing Plan**

What **roles & responsibilities** are required to support core functions?

For **development:**

organizational chart

job descriptions

Differentiation of Responsibilities

USFHealth

- Organizational Strategy & Execution
- Operations & Change Management
- Strategic Initiative Management
- Coordination & System Administration
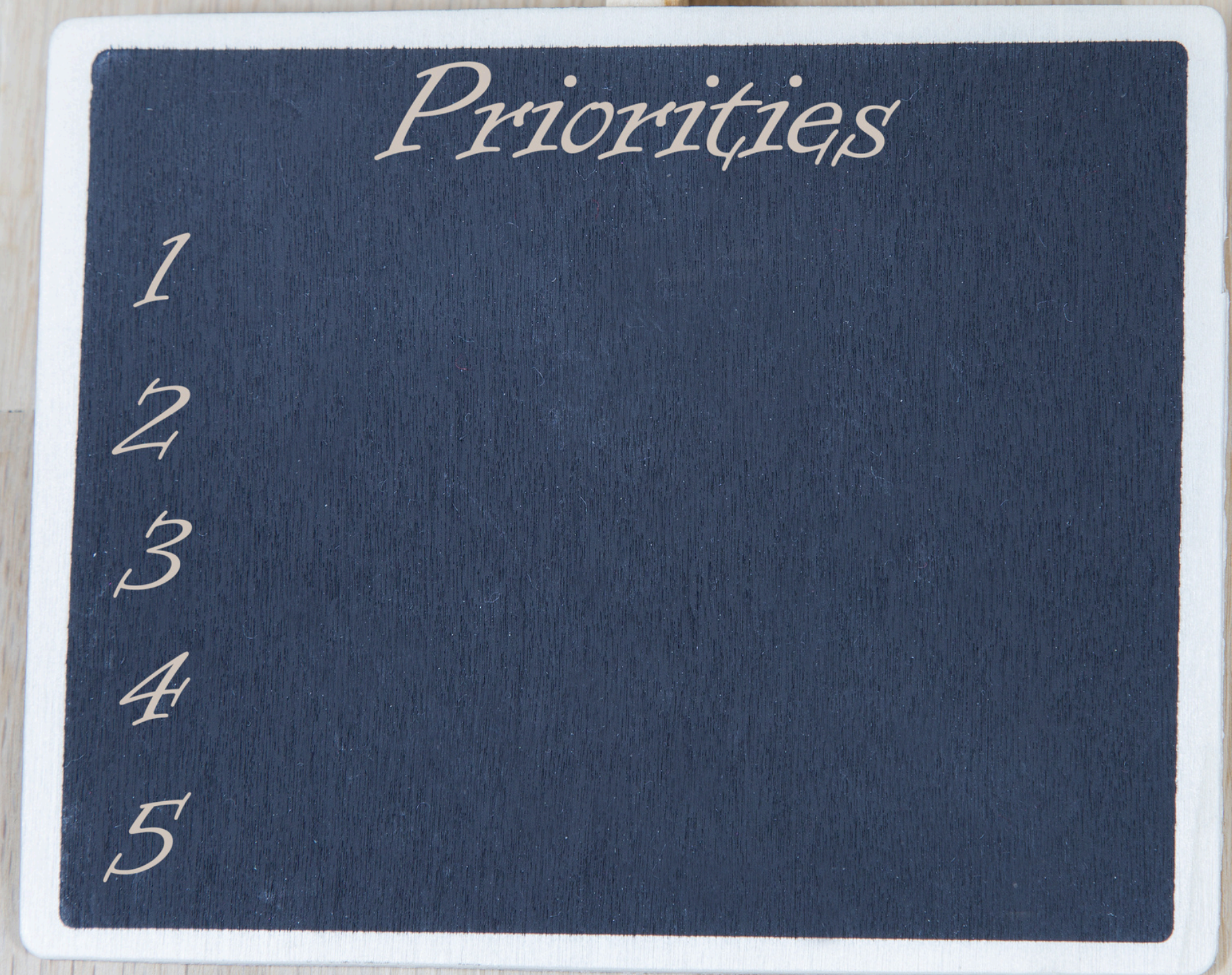
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- Enterprise Strategy & Alignment
- Annual Operational Planning
- Enterprise Performance Management
- Strategic Initiative Management
- System Integration Facilitation

5 **Set Priorities**

How will you **prioritize** your work?

Prioritization Framework

The prioritization framework serves as a guide for selection and acceptance of strategic initiatives and allows the OSI to make recommendations to the Executive Vice President (EVP). If the answer is 'no' for any of the questions below, the OSI will not recommend commencement of the initiative or it will be placed on hold for future consideration.

STRATEGIC IMPORTANCE	ORGANIZATIONAL ALIGNMENT	READINESS	IMPACT
LEVEL 1	**LEVEL 2**	**LEVEL 3**	**LEVEL 4**

LEVEL 1

1. **Is the proposed initiative a priority of the EVP or Chief Strategy Officer?**

2. **Will the proposed initiative do one of the following?**
   - Support business growth/organizational development/partnerships/profitability
   - Address a critical or urgent need

LEVEL 2

3. **Does the proposed initiative align with USF Health's mission and OSI established annual priorities?**

   OSI Annual Priorities:
   - SP1: Further the USF Health clinical mission through organizational development and partnerships
   - SP2: Strengthen the USF Health research mission to support and maintain USF's preeminence status
   - SP3: Support the USF Health academic mission through organizational development, planning, and partnerships

4. **Does the proposed initiative meet the defined criteria for a 'strategic initiative activity'?**

LEVEL 3

7. **Does the proposed initiative meet all of the following readiness requirements?**
   - OSI has <u>capacity</u> to support the initiative
   - <u>Timeframe</u> is realistic
   - <u>Human resources</u> with the appropriate skills are available and can be assigned to support deliverables
   - <u>Technology</u> required is available
   - Required <u>budget</u> is available or can easily be obtained
   - Required <u>data/information</u> to guide execution is available
   - <u>Complexity</u> will not hinder execution

LEVEL 4

8. **Is it expected the proposed initiative will impact a wide range or large number of stakeholders?**
   AND/OR
   Will the proposed initiative generate revenue or reduce costs?

9. **Can you confirm the anticipated risks will not outweigh the benefits? Consider the following:**
   - POLITICAL - Disruption to success by governments, government policies, political elements, or groups
   - ECONOMIC - Economic factors that may impact pricing, revenue, and costs
   - SOCIAL - Demographic/social

6 Develop a Budget

Consider:

- Staff salaries/stipends
- Space requirements
- Strategic planning (or project management) software
- Equipment, materials & supplies
- Travel expenses
- Training & professional development (including memberships)
- Other resources

7 Obtain Approval

Who needs to **approve**?

How will you **gain buy-in**?

8 **Plan for Operations**

Consider:
- Service agreement with key stakeholders
- Standard operating procedures
- Space
- Technology implementation
- Training
- Meeting structure

9 **Communicate**

How will you **market** your services?

How will you **report** on your progress and achievements?

10 **Evaluate**

How will you...

capture **lessons learned** ?

solicit **feedback**?

continually **improve**?

Resources: Guidelines & AI Prompt for Feedback Surveys; Lessons Learned Questions & AI Prompt for Moderating a Session

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