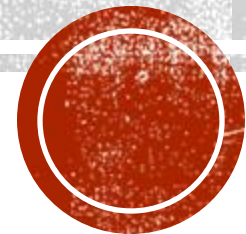# BETTER STRATEGIC PLANNING

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OBJECTIVES

- The role of strategies through the change management lens

- Ideation vs. Implementation

- Tactics for inclusive planning and easier tracking

? CHECK-IN

- You are asked to join a half-day strategic planning session. Show your emotion using an emoji.

- What are the strategic planning challenges in your organization?

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BACKGROUND

- **Before**:
  - Mainly selected few leaders
  - Outsourced facilitation expertise caused a lack of follow-up and sustainability of strategic plans
  - Not many departmental-level planning
  - No trained facilitators were available

- **Challenges:**
  - Inefficient strategic planning meetings
  - Less accountability
  - Disengaged audience and less buy-in
  - Not sure how to include inputs from various constituencies

INTERVENTIONS

- Incorporated Management consulting experiences & Organizational Change Management principles, focusing on **collaborative problem-solving** with **sustainable solutions**

- Over 35 sessions were conducted with the new approach:
  - Group size: 4-100 people
  - Clinical and non-clinical departments

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RESULTS AT SIU SOM

- Increased ownership and buy-in of goals, mission, or vision

- Stronger sense of team and community

- Feel valued, appreciated, and heard

- Commitment and personal meaning

- Decreased time spent on making decisions on mission, vision, and goals: from 3-6 months to 1 pre-survey and 1 working session

WHAT PARTICIPANTS SAID

- "Getting to spend time with some colleagues with whom I normally don't interact much was nice, and created **a better sense of community**."

- "Our department has a great team of professionals. I was impressed by the interactions, the **willingness to participate** and **the wealth of ideas** shared by **everyone**."

- "We have a lot of good ideas. But **we DO NOT have the time, personnel, or resources** to successfully execute even a small percentage."

- "Feeling **more confident** about creating and implementing ideas for the new center. Also, **interacting with colleagues** and **getting to know everyone better** was nice."

- "We have a great department and we are all striving for **the same goals**. All of have our own **unique contributions**."

- "**Morale** now seems to be better than it was at the last retreat."
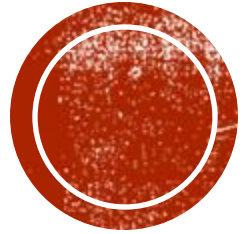
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❓ WISH LIST

- What do you wish to have or want to experience during the strategic planning?

- Example: Engaging, fun, inspiring, getting to know the goals better while building stronger teams

IDEATION VS. IMPLEMENTATION

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STRATEGIES FROM THE ORGANIZATIONAL CHANGE MANAGEMENT LENS

Mission

Strategies

Vision

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CONSIDERATIONS DURING IDEATION

- Psychological safety and trust
- Personality-related inclusion
- Do less and obsess
- Operation - Pace of work

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INCLUDE DIVERSE VOICES

- Build Trust
  - Representatives for each group/stakeholder
  - Feel valued and appreciated
  - Create a brave space

- Leverage pre-survey

- Small groups
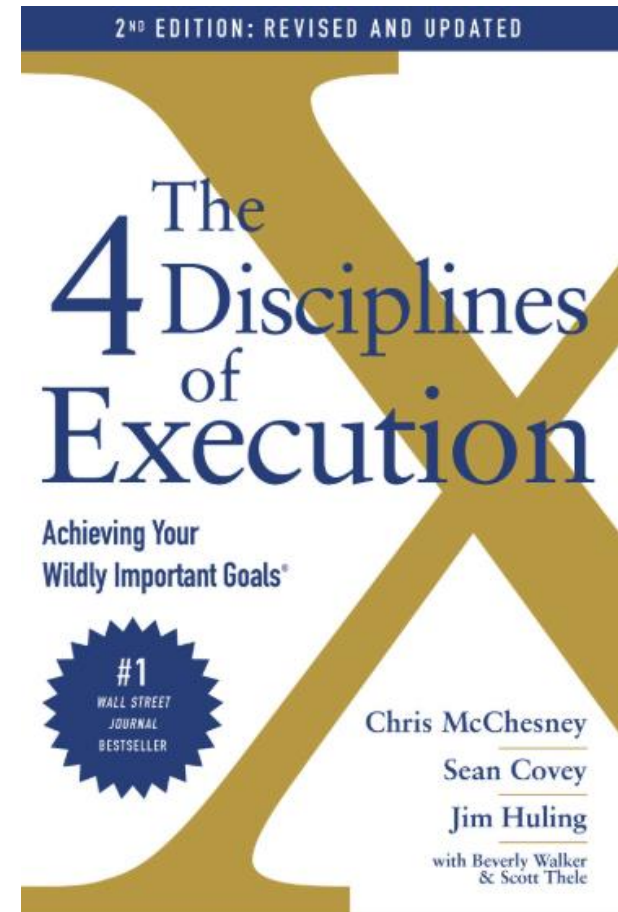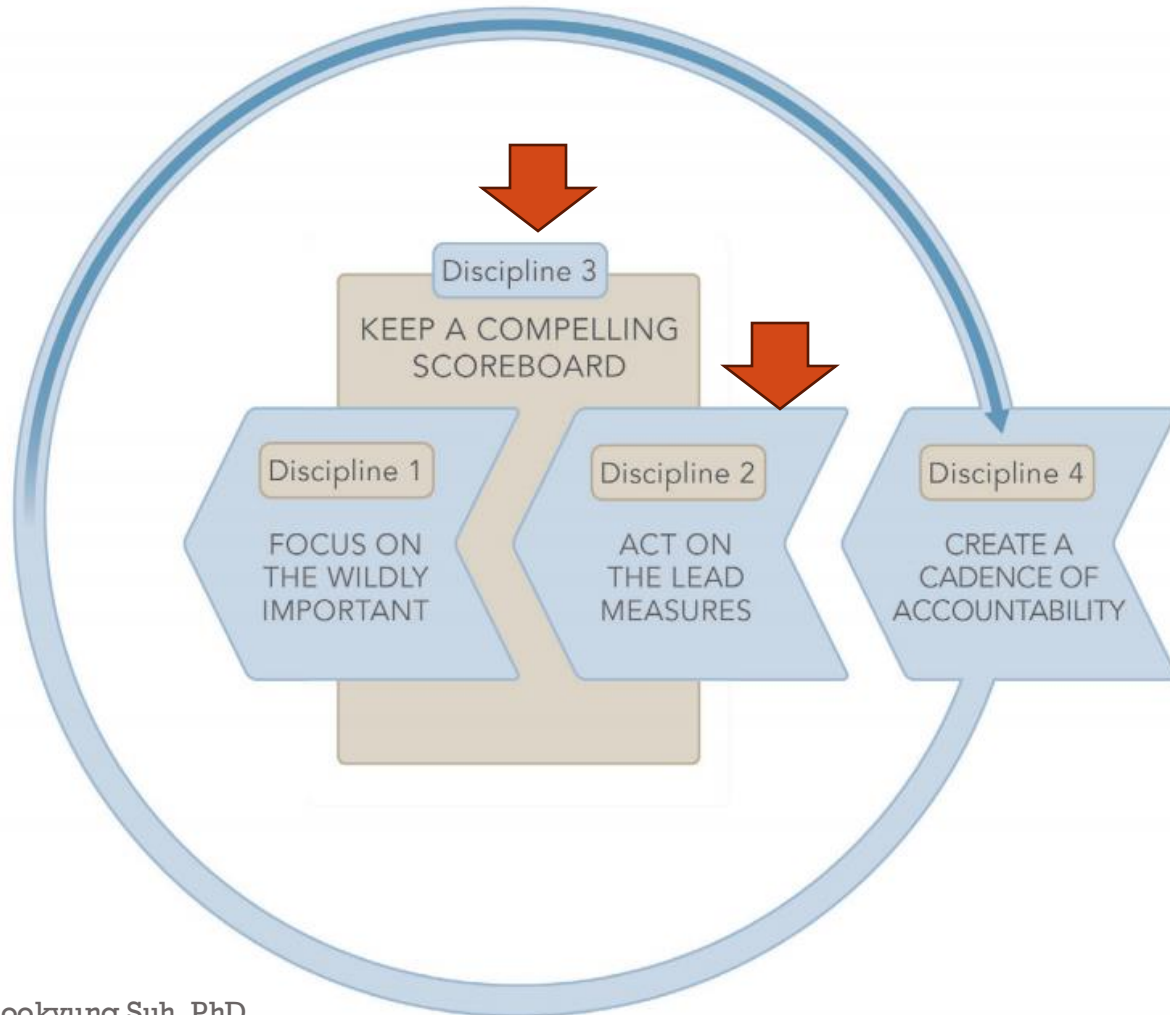
- Live polls

- Anonymous or collaborative approach

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? REFLECTION

- What conditions will help you or your team fully engage in strategic planning sessions?

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PLANNING AND IMPLEMENTING STRATEGY

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2. ACT ON THE LEAD MEASURE

- **Lead measure (leading indicators)** = a set of process indicators that will have a positive impact on the achievement of WIG

- **Lag measure:** measures the goals, retrospective

? LEAD OR LAG MEASURE?

- **Scenario**: The outpatient clinic aims to improve patient satisfaction from 70% to 85% over the next six months.

- **Question**: What are the lead and lag measures?

1. Patient satisfaction scores from post-visit surveys
2. Number of clinic staff completing customer service training
3. Average wait time for patients to see a doctor

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PERSONAL GOAL: SAMPLE

- **WIG Example:** Increase scholarly activities by presenting at least 3 conferences and submitting at least 2 manuscripts by end of Dec 2024.

- **Lag measure:** # of presentations and # of publications

- **Lead measures**

  - # of abstracts submitted

  - # of writing projects and collaborations

  - # of meetings to follow up on writing projects

  - # of hours blocked for scholarly activities per week
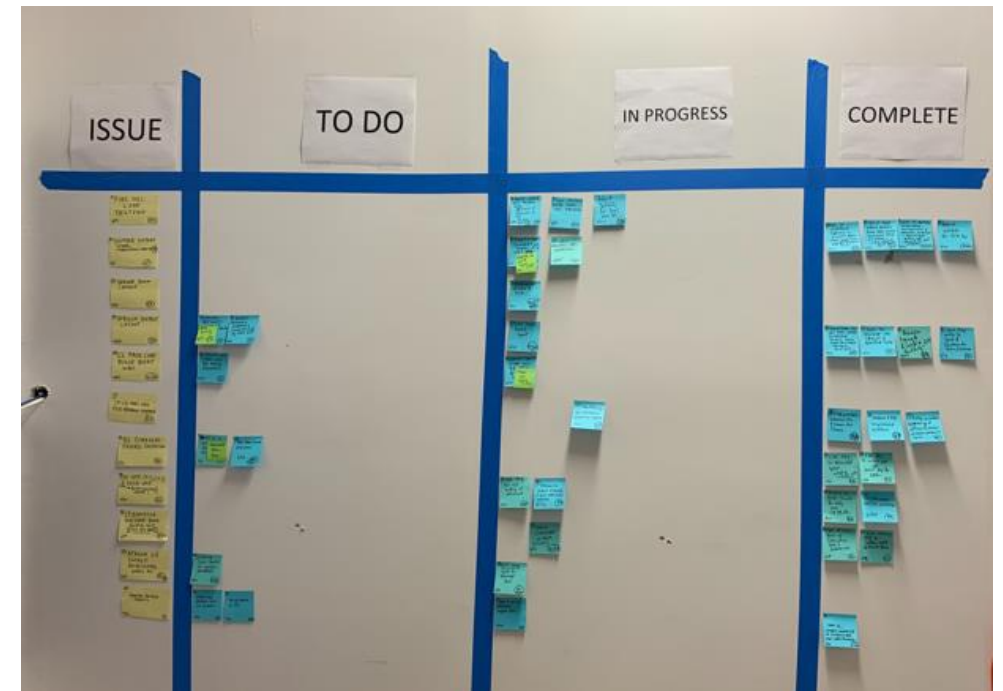
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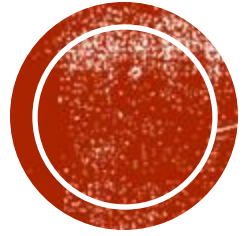
STRATEGIC PLANNING IMPLEMENTATION

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3. KEEP A COMPELLING SCOREBOARD

- Measure what matters

- Sustainability over perfection

- Characteristics of a compelling scoreboard

1. Is it simple?

2. Can I see it easily?

3. Does it show lead and lag measures?

4. Can I tell at a glance if I'm winning? – Player vs. Coach's view

PHYSICAL SCOREBOARD

SCOREBOARD EXAMPLE

- **Wildly Important Goal (WIG)**: Improve patient satisfaction from 70% to 85% over the next quarter.

Week	Number of Surveys Completed (Lead)	% of Doctors Following Up with Patients (Lead)	Patient Satisfaction Score (Lag)
1	45	80%	70%
2	50	85%	72%
3	60	90%	78%
4	70	92%	82%
5	75	95%	85%

Goal: Meet Behavioral Provider/Team Productivity Goals by End of Fiscal Year

Lag: Total number of visits completed by behavioral health team
Lead: number of patients scheduled for each provider per week

Week of:	6-Jan	13-Jan	20-Jan	27-Jan	31-Jan	3-Feb	10-Feb	17-Feb	24-Feb	28-Feb	3-Mar	10-Mar	17-Mar	24-Mar	31-Mar
# on waitlist	**38**	**27**	**25**	**28**	**32**	**34**	**27**	**16**	**22**	**22**	**31**	**26**	**18**	**20**	
# sch/#arrive															
JB	18/16	24/16	18/9	26/21	14/12	9/8	19/13	28/22	17/14	12/	7/6	26/22	26/22	22/20	OUT
TB	22/14	16/10	19/14	25/16	11/10	12/5	18/14	27/22	23/16	15/	12/9	27/21	13/10	26/18	
TY	12/6	18/14	18/11	15/4	12/8	12/6	18/11	22/20	26/17	OUT	OUT	24/15	22/15	28/20	
# of calls															
JB	0	2	0	0	0	0	0	2	2	0	1	0	0	0	
TB	2	0	0	0	0	3	4	0	1	0	0	0	0	0	

❓ WHAT TOOLS DOES YOUR TEAM USE TO KEEP SCORES?

- Excel

- Project management tools

- Physical board

- Emails

- Sticky notes

- ???

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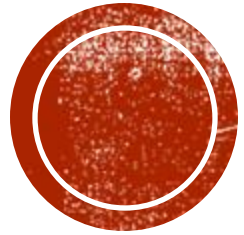
BETTER ENGAGEMENT

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ENGAGEMENT CONSIDERATIONS

- Get to know each other

- Visual

- Pace

- Instant gratification

- Result-driven

- Connect to the big picture

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ICE BREAKER SAMPLE

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- What others think what I do
  - vs.
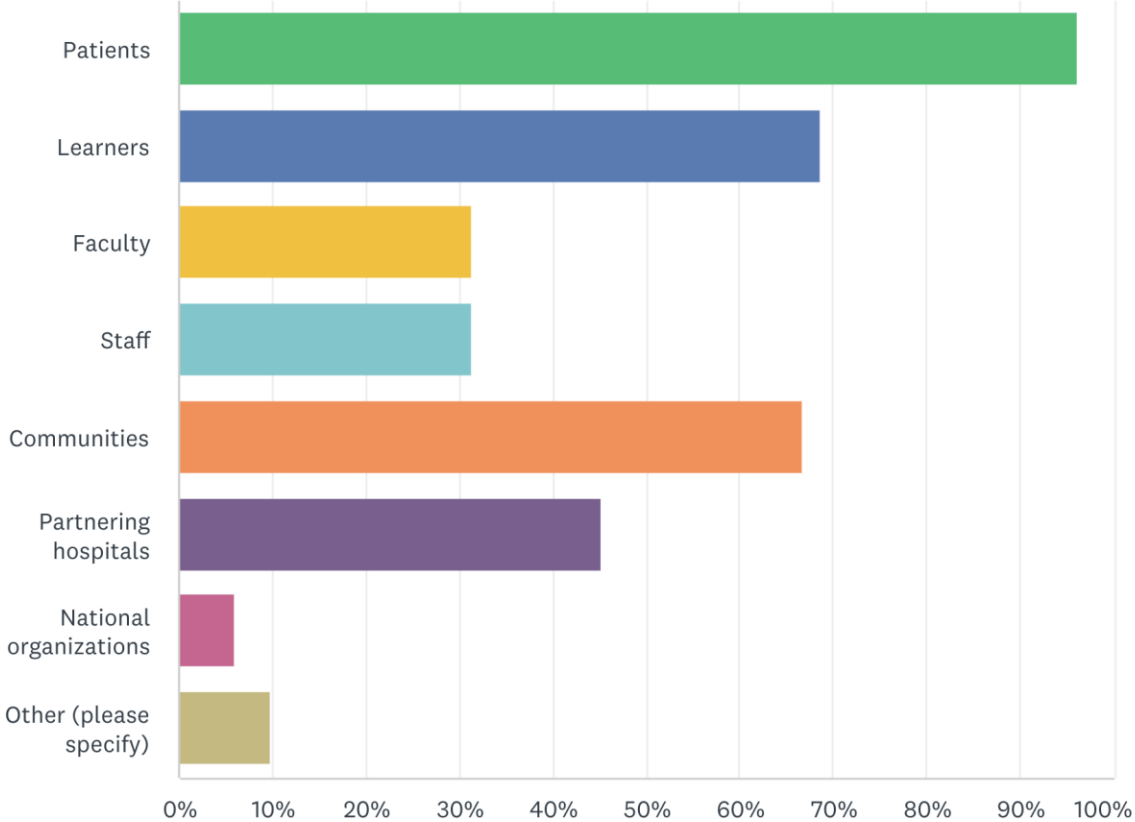- What I actually do most of the time

SURVEY - WHY WE EXIST: BREAKDOWN

To do what	And how
Provide patient care	Excellent, high-quality, evidence-based care, most up-to-date treatments, exceptional, compassionate, comprehensive and holistic care, for better quality of life, patient-centered
Educate, Train, teach next generation neurologists, students, and researchers	Innovative curriculum, diverse cases, research opportunities, approachable faculty
Research	Neurological diseases/disorders, evidence-based
Support community	Patient care Provide trained physicians Educate and support families and care givers of patients

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SURVEY: WHO WE SERVE

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KEEP THEM ENGAGED- SAMPLE

Part 3 – Strategic planning (2:30 pm)	1. SOAR Analysis Introduction – 5-10 mins 2. Group session • 15 mins: 4 groups working on one of SOAR areas. • 15 mins: each group will move to the next group and then add to the area (5 minutes each, 3 times)
Develop Action items (3:20)	Aspiration & Results from SOAR – Goals and objectives, divide by focus areas and timeline • 5 -10 min – explanation of the logic model and the activity • 30 min – develop strategies and action items by each area (research, clinical, education, and community services) • 20 min – report to the large group Divide by area of focus and then develop action plans (input, **process/strategy** vs. goals)

TAKE HOME MESSAGE

- Explore ways to increase buy-in through **inclusive** strategic planning

- **Intentional and thoughtful design** of strategic planning will pay off

- Clarify the **destination** vs. **various ways** to get there

- Make it **fun**: live poll, humor, game, real-time progress

- Measure **what matters**

- Leverage a simple, effective **scoreboard** to engage people

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Q&A

- Contact: ssuh89@siumed.edu

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