



TOOL/UTILITY

Sustainable Practice Coaching Program Suite of Business Tools

January 2014

This suite of business tools, specific to developing and selling primary care practice support products and services, will help Alliances interested in developing a written strategic plan, determining which products and services to focus on given limited resources, and tracking status of potential revenue streams. Better Health *Greater* Cleveland assisted in developing the Product Prioritization Matrix and the New Business Practice Pipeline Tracking Report. They have used these two tools extensively and have found them to be very beneficial in supporting business decisions during this critical stage of developing a sustainable revenue stream to continue practice support programs in their community.

Practice Support Program Suite of Business Tools

Business Planning Grid

- Purpose: Write a business plan specific to the Primary Care Practice Support portfolio.
- This tool serves as a guide for writing a business plan for the portfolio of primary care practice support, including a suggested order for writing and suggested details for the content of each section.
- Format: Excel spreadsheet.

Product Prioritization Matrix

- Purpose: Identify what products and services we want to develop, enhance, or sunset.
- This tool provides decision support for alliances to determine whether a product or service should be further developed and marketed based on internal and external criteria.
- Format: Excel spreadsheet (matrix) and Word document (instructions).

About *Aligning Forces for Quality*

Aligning Forces for Quality (AF4Q) is the Robert Wood Johnson Foundation's signature effort to lift the overall quality of health care in targeted communities, as well as reduce racial and ethnic disparities and provide real models for national reform. The Foundation's commitment to improve health care in 16 AF4Q communities is the largest effort of its kind ever undertaken by a U.S. philanthropy. AF4Q asks the people who get care, give care and pay for care to work together to improve the quality and value of care delivered locally. The Center for Health Care Quality in the Department of Health Policy at George Washington University School of Public Health and Health Services serves as the national program office. Learn more about AF4Q at www.forces4quality.org. Learn more about RWJF at www.rwjf.org.

About the Author

Improving Performance in Practice (IPIP) provides technical assistance for the Robert Wood Johnson Foundation's *Aligning Forces for Quality* initiative. IPIP is working with *Aligning Forces* communities to provide customized support and capacity building for quality improvement (QI) projects, including guidance on sustainability efforts related to QI.

Key contact for business tool suite: Jen Powell, IPIP Technical Advisor, jen@jenpowell.net

New Business Practice Pipeline Tracking Report

- Purpose: Track status of potential revenue streams
- This tool serves as a tracking document that identifies potential clients, project funding streams, timing of funding streams, and percent probability based on level of sales stage for each prospect. As inputs are placed in the worksheet, summary and pivot tables automatically update to provide leaders with a snapshot of revenue forecast by quarter and annually.
- Format: Excel spreadsheet.

**Aligning Forces
for Quality** | Improving Health & Health Care
in Communities Across America



For more than 40 years the Robert Wood Johnson Foundation has worked to improve health and health care. We are striving to build a national Culture of Health that will enable all to live longer, healthier lives now and for generations to come. For more information, visit www.rwjf.org. Follow the Foundation on Twitter at [www.rwjf.org/twitter](https://twitter.com/rwjf) or on Facebook at www.rwjf.org/facebook.