



# Strategic Planning 101 Webinar

June 2012


*For more information contact:*

David E. Williams  
MedPharma Partners LLC  
101 Federal Street, Suite 1900  
Boston, MA 02110  
(617) 731-3182  
[dwilliams@mppllc.com](mailto:dwilliams@mppllc.com)

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



# Agenda

- 
- What is strategic planning?
  - Work planning
  - Organizational assessment
  - Market analysis
  - Strategic option development
  - Deliverable creation
  - Specific considerations for the 4.0 application
  - Q&A



# What is strategic planning?

- A systematic process to establish long-term goals and a path to accomplish the goals
- An opportunity to look beyond the day-to-day
- A way to evaluate tradeoffs and to specify what not to do as well as what to do
- A reality check

# Overview of a typical work plan

## Setup

*Establish work plan, timeline, strategic planning task force*

## Organizational assessment

*Understand organizational history, achievements, culture, ambitions*

## Market analysis

*Gather, analyze, synthesize primary and secondary data*

## Strategic option development

*Identify dimensions, establish criteria, specify options, evaluate*

## Deliverable creation

*Create narrative, financial plan, implementation road map*

## Implementation

*Execute on plan, make mid-course corrections*



# Work planning considerations

- Plan the schedule to take advantage of existing board meetings, retreats
- Consider using a standing committee, e.g., Executive Committee as the core of the strategic planning task force



# Characteristics of an ideal strategic planning task force

- Diversity of views and experience
- Open-minded, constructive, action-oriented
- Able to commit the time (or at least be responsive)
- Five to 15 people
- Mix of board, staff, and external partners

# Step 1: Setup



<b>Activities</b>	<ul style="list-style-type: none"> <li>• Review existing strategy/sustainability/business plans</li> <li>• Identify and contract with facilitator/consultant</li> <li>• Outline key data gathering and analysis modules</li> <li>• Identify key partners</li> <li>• Appoint strategic planning task force</li> <li>• Establish timeline and schedule meetings</li> <li>• Outline deliverables</li> </ul>
<b>Data sources</b>	<ul style="list-style-type: none"> <li>• Prior plan(s)</li> <li>• AF4Q 3.0 applications</li> </ul>
<b>Outputs</b>	<ul style="list-style-type: none"> <li>• Work plan and timeline</li> <li>• Consultant contract</li> <li>• Strategic planning task force membership</li> <li>• Partner list</li> </ul>

# Step 2: Organizational assessment



<b>Activities</b>	<ul style="list-style-type: none"><li>• Review organizational history, achievements, culture, ambitions</li><li>• Analyze alliance trends, e.g., financial, membership</li><li>• Conduct kickoff meeting<ul style="list-style-type: none"><li>• Review work plan, background data</li><li>• Discuss/modify vision, mission</li><li>• Conduct SWOT</li><li>• Develop strategic hypotheses to test in market analysis step</li></ul></li></ul>
<b>Data sources</b>	<ul style="list-style-type: none"><li>• Prior plans and AF4Q applications</li><li>• Financial and operational records</li><li>• Strategic planning task force</li></ul>
<b>Outputs</b>	<ul style="list-style-type: none"><li>• History and trend data for fact base</li><li>• SWOT</li><li>• Hypotheses for market analysis</li></ul>



# Step 3: Market analysis

Setup

Organization assessment

**Market analysis**

Strategic option development

Deliverable creation

## Activities

- Identify priorities for data gathering based on hypotheses, e.g., key players in market landscape, state and federal initiatives
- Develop interview guides, interviewee lists and data gathering templates
- Collect primary and secondary data
- Prepare findings
- Conduct workshop to review

## Data sources

- 2ry: Stakeholder/competitor websites, journal articles, market research/analyst reports, databases, government data (HHS, Census Bureau, IRS)
- 1ry: Stakeholder and expert interviews

## Outputs

- Stakeholder and expert feedback organized by key theme or hypothesis
- Map of market landscape

# Step 4: Strategic option development



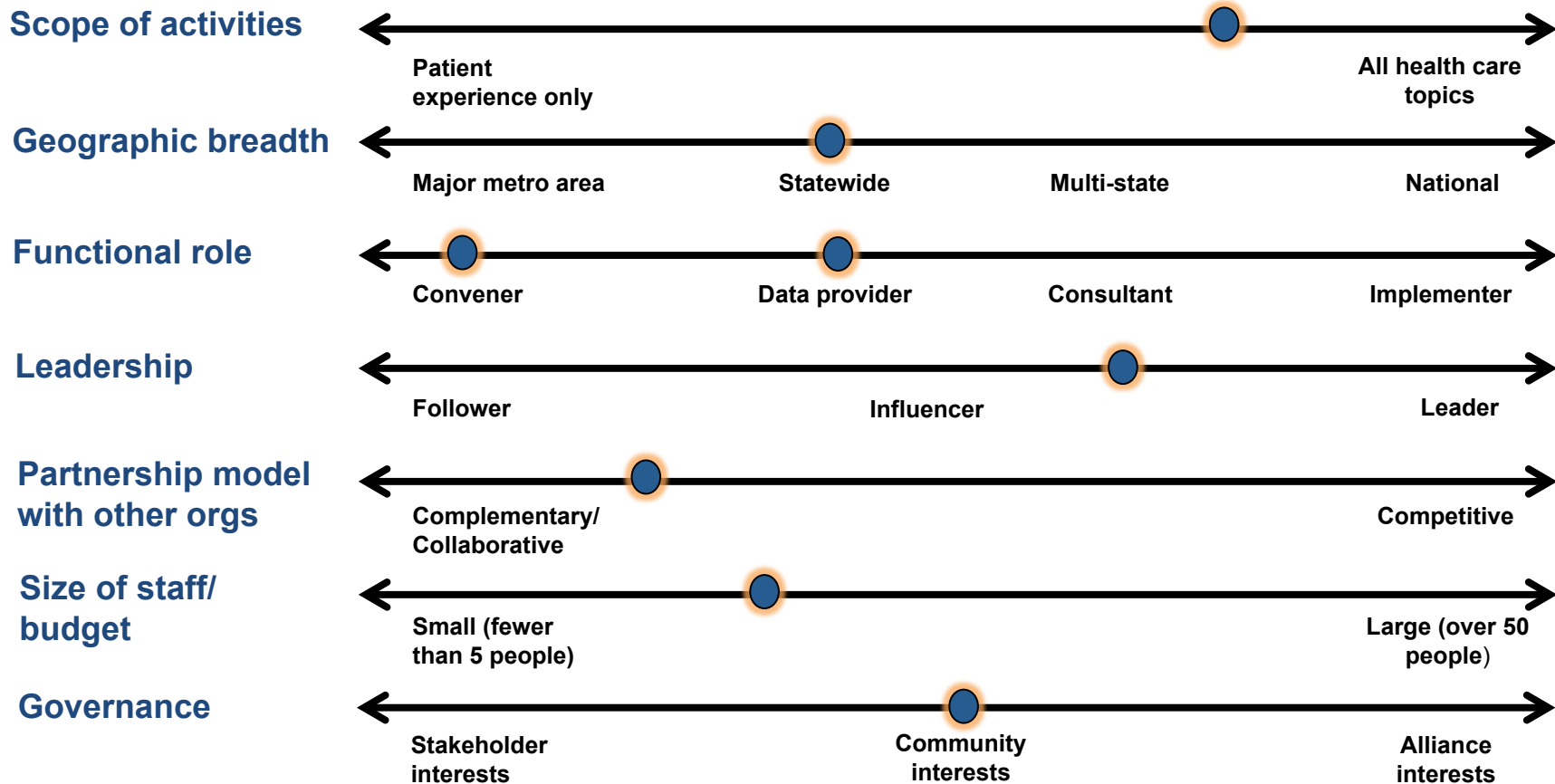
<b>Activities</b>	<ul style="list-style-type: none"><li>• Identify key dimensions</li><li>• Establish criteria to evaluate options</li><li>• Specify options</li><li>• Evaluate using the criteria</li><li>• Refine: modify or combine options to create new ones</li><li>• Conduct workshop to review and advise</li></ul>
<b>Data sources</b>	<ul style="list-style-type: none"><li>• Organizational assessment and market analysis outputs</li><li>• Strategic planning task force</li></ul>
<b>Outputs</b>	<ul style="list-style-type: none"><li>• Criteria and (possibly) weightings</li><li>• Dimensions and ranges</li><li>• ~3-4 options, with assessment of each</li></ul>



# Illustrative criteria to select options

Criterion	Rationale
Fit with Triple Aim	Direct tie to alliance mission
Level of impact	Need significant impact to make a difference
Feasibility with existing assets/skills	Closer fit with capabilities increases probability of success
Risk (avoidance of)	Reduce probability of failure
Fill a white space	Fill an unmet need; avoid competing with stakeholders
Reputation building opportunity	Ability to achieve success that can be leveraged
Achieve financial return on investment	Enhance likelihood of sustainable business model
Align with key funder(s)	Ensure adequate funding

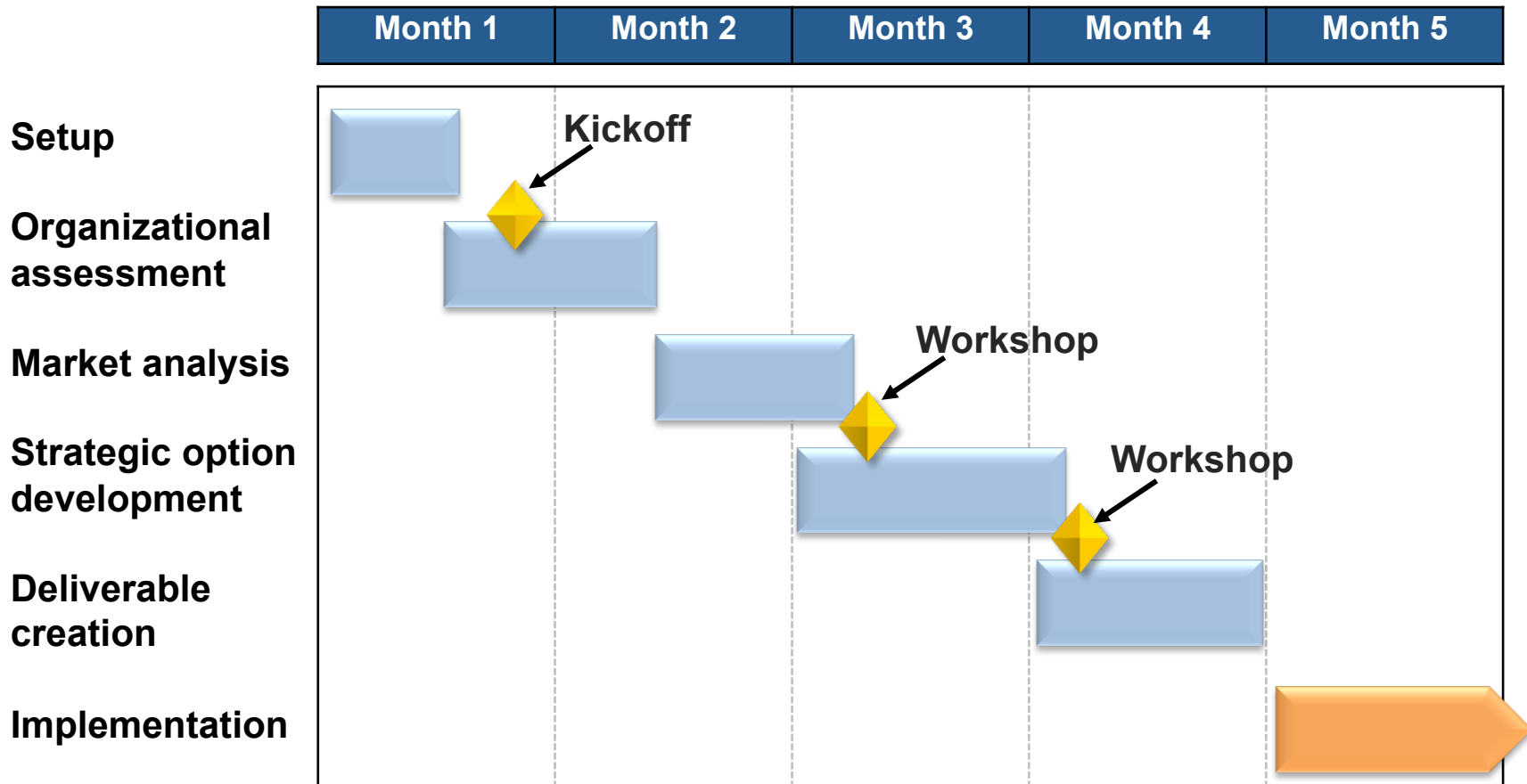
# Strategic dimensions and option development example



# Step 5: Deliverable creation

	<div style="display: flex; justify-content: space-around; text-align: center;"> <div style="border: 1px solid #0056b3; padding: 5px; background-color: #d9e1f2;">Setup</div> <div style="border: 1px solid #0056b3; padding: 5px; background-color: #d9e1f2;">Organization assessment</div> <div style="border: 1px solid #0056b3; padding: 5px; background-color: #d9e1f2;">Market analysis</div> <div style="border: 1px solid #0056b3; padding: 5px; background-color: #d9e1f2;">Strategic options development</div> <div style="border: 1px solid #0056b3; padding: 5px; background-color: #0056b3; color: white;">Deliverable creation</div> </div>
<b>Activities</b>	<ul style="list-style-type: none"> <li>• Produce strategic planning document</li> <li>• Extract relevant sections for AF4Q 4.0 application</li> </ul>
<b>Data sources</b>	<ul style="list-style-type: none"> <li>• Outputs from prior modules</li> </ul>
<b>Outputs</b>	<ul style="list-style-type: none"> <li>• Strategic planning narrative             <ul style="list-style-type: none"> <li>• Mission and vision</li> <li>• Situation assessment: organization, market</li> <li>• Long terms goals and objectives</li> <li>• Strategy to achieve goals</li> </ul> </li> <li>• 3-5 year financial plan             <ul style="list-style-type: none"> <li>• Revenue by category and funder</li> <li>• Headcount and associated expense by major initiative</li> </ul> </li> <li>• High-level implementation road map             <ul style="list-style-type: none"> <li>• Work plan for major initiatives with quarterly milestones</li> <li>• Measures of success and targets</li> <li>• Assignment of responsibility</li> </ul> </li> </ul>

# An aggressive timeline is needed to meet 4.0 application deadline





## Special considerations for 4.0

- Tight timeline may influence choice of facilitator, scheduling of meetings, size and composition of planning group
- There may be a need to defer certain decisions until after the application deadline
- Application requirements focus on AF4Q 4.0 activities to 2015 and beyond, but strategic plan may encompass a broader set of activities and organizations
- Application elements will need to be extracted from the overall deliverables



# Q&A