Strategic Planning 201
Webinar

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For more information contact:
David E. Williams
MedPharma Partners LLC
101 Federal Street, Suite 1900
Boston, MA 02110
(617) 731-3182
dwilliams@mppllc.com

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

Agenda

- Updating an existing plan
- Advanced data gathering techniques
  - Interviewing
  - Online surveys
  - Benchmarking
- Partnerships and mergers
- Working with a facilitator or consultant
- Q&A

Modifying an existing plan versus starting over

- Are goals still seen as central?
- Are the strategies being implemented?
- Has there been a significant change in the environment?
- Is existing plan comprehensive?
- Does AF4Q 4.0 impact the existing plan?

Dealing with "strategic planning fatigue"

- Build on or at least refer to prior plan
- Identify lessons learned from earlier process that can make the new one succeed
- Include a somewhat different set of partners
- Collect more, better internal and external data to inform the plan
- Convey that strategic planning is an ongoing process, not a one-time event

Interview techniques

Developing the guide	• Hypothesis driven • Topic list, not a script • Quantifiable answers where possible
Conducting interviews	• Test the guide • Sequence interviews thoughtfully • In-person at interviewee's office if possible • Active listening
Documenting results	• Type notes as you go • Write up key points right away • Use dictation or transcription if you hand write
Presenting summary findings	• Synthesize key points • Present opposing views • Disguise respondent identities • Integrate secondary data/expert interviews • Foreshadow strategic options, criteria

Online surveys

- Online surveys are useful for:
  - Prioritizing issues and highlighting differences in a “beliefs audit”
  - Gaining input from a large number of people in a compressed time frame
  - Preparing for follow-up interviews
  - Collecting and comparing quantitative information
  - Soliciting anonymous feedback
- SurveyMonkey is cheap, powerful, easy to use

Benchmarking

When to do it	• To address an issue that's new to you but that others have faced • To move from intra-alliance negotiation or stalemate to a less threatening educational exercise
Appropriate topics	• Financial and other quantitative topics, e.g., revenue breakdown, dues structure, number of staff • New strategies, e.g., PM/PR, data warehouse, becoming a "backbone" organization • Governance evolution
How to do it	• See if someone has already done it –or something close (NPO, TA provider, publicly available) • Keep it simple –apples to apples comparisons are hard • Develop template and apply to own organization first • Identify other relevant alliances, nationally, locally • Gather info and double-check results/interpretation
Sensitivities	• Financial data • Strategic intent • Making another alliance look bad

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Partnerships and mergers

When to consider	• Overlapping or converging mission, goals, activities • Common stakeholders, board members, funders • Ramping down of major funding program • Complementary skill sets • When one or both organizations are sub-scale
Main steps	• Mapping of market/competitive landscape to determine whom to approach and to identify rationale • Approach by board chair or ED with support of board • Small board working group if promising • Joint proposal development • Present to both boards for discussion, approval • Consider intermediate steps, e.g., joint hire
Typical pitfalls	• Getting distracted by time consuming, ultimately fruitless efforts • Overestimating the level of commitment/feasibility that exists • Perception of merger of equals v. reality of acquisition • Underestimating disruption of combining • Less "synergy" than expected – especially if viewed as cost-cutting • Governance

What to look for in a consultant

- Functional skill set: strategic planning, facilitation, data gathering, analysis, presentation, writing
- Knowledge of your alliance or similar organizations and your community
- Ability to work with your key partners, e.g., comfort working with senior executives in for-profit and non-profit domains
- Objectivity and open mindedness
- Personality: empathetic, low ego
- Client references

Getting the most out of the consultant relationship

- Be clear on goals and timelines
- Know when to be assertive and when to trust consultant's judgment
- Leverage consultant's outside relationships and access to data
- Provide on-the-ground support, e.g., scheduling
- Utilize consultant's objectivity and expertise to influence stakeholders
- Encourage consultant to tee up difficult issues, then prepare to follow through

Q&A