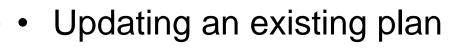
Strategic Planning 201 Webinar

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Aligning Forces for Quality In Communities Across America

Agenda



- 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

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