



WHITE PAPER

Determining your Practice's Strategic Plan

When undertaking strategic planning for your practice, one of the key areas is to define or review the organization's values, community vision, and mission. Be sure there is consensus on why the practice exists, what goals or outcomes it seeks to achieve, what it stands for, and whom it serves. Consider beginning your strategic planning by agreeing on the following:

- **Organizational core values or operating principles** – those beliefs or principles that guide the practice
- **Community Vision** – your vision for the community
- **Mission** – the stated purpose for your practice's existence

Agreeing on values, vision, and mission is usually best accomplished as a part of a planning retreat or at a special meeting and can take several hours. Often, you will draft the values and mission statement and describe the vision as part of your strategic planning session.

Develop a series of goals or organizational status statements, which describe the practice in a specified number of years - assuming it is successful in addressing its mission. It is usually a short step from the vision to goals - sometimes the statements describing the vision are essentially goal statements. It is extremely valuable to transform the vision into a series of key goals for the practice, preferably in the form of status statements describing the practice.

Agree upon key strategies to reach the goals and address key issues identified through an environmental scan. The major emphasis should be on broad strategies, including current and new program, advocacy, collaborative, or other approaches. These strategies should be related to specific goals or address several goals. The process requires looking at where the practice is now and where its vision and goals indicate it wants to be, and identifying strategies to get there. Approaches might include the following:

- Once the issues to be addressed and the goals have been specified, the planning group, staff, or a consultant might look back at the strengths, weaknesses, opportunities, and threats (SWOT) results of the environmental scan. They can identify changes in current strategies which may be required to reach the goals and address the issues. This might mean identifying potential new strategies or suggesting changes in emphasis or priority.

- The planning group might review the planning process to date, and develop a series of alternative approaches or scenarios. Based on the decisions made using these scenarios, strategies will be determined.

Whatever the specific approach used, specific criteria for evaluating and choosing among strategies should be agreed upon. They might include such criteria as the following:

- **Value** – Will the strategy contribute to meeting agreed-upon goals?
- **Appropriateness** – Is the strategy consistent with the practice's mission, values, and operating principles?
- **Feasibility** – Is the strategy practical, given personnel and financial resources and capacity?
- **Acceptability** – Is the strategy acceptable to the owners, key staff, and other stakeholders?
- **Cost-benefit** – Is the strategy likely to lead to sufficient benefits to justify the costs in time and other resources?
- **Timing** – Can and should the practice implement this strategy at this time, given external factors and competing demands?

Based on these or other agreed-upon criteria, strategies can be evaluated and selected, or prioritized. In agreeing upon strategies, the planning group should always consider the need to clearly define responsibilities for their implementation. There must be a coordinated effort, from both physicians and the practice manager, to take responsibility for implementing this strategy.

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