



OhioHealth

BELIEVE IN WE™

Growing Global Leaders... Advancing Palliative Care



Introduction to Strategic Planning

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ED, Palliative Medicine, Research & Education

LDI C2 RC2
October 21-28, 2012

Objectives

- Elements of an effective strategic planning process
- Our strategic planning exercise
- Your end-of-week presentation

Why Plan ?

What is Strategic Planning ?

**Who should
be Involved ?**

Overview of Strategic Planning

1. OVERALL CONCEPT

- Define the **Overall Purpose** of your initiative

2. SITUATION ANALYSIS

- Conduct an **Environmental Analysis**
- Conduct a **Stakeholder / Customer / Competitor** analysis
- Establish their **Needs**

3. STRENGTHS, WEAKNESSES, OPPORTUNITIES, THREATS ANALYSIS

- Conduct a **SWOT** analysis
- Strengths and weaknesses are internal to your initiative
- Opportunities and threats are external to your initiative

4. VISION

- Write a **Vision** statement for your initiative that inspires others with an image that pulls them forward
- A vision statement defines what you desire the situation will be in if your initiative is successful

5. MISSION

- Write a simple, concise **Mission** statement for your initiative
- A mission statement defines what your initiative will do

6. VALUES

- Define the **Values** that your team will use to guide how your team works together
- Values are our core beliefs and principles that guide our day-to-day activities as a team

7. GOALS FOR THE NEXT 2 - 5 YEARS

- Create 2 – 3 strategic **Goals** for your initiative
- Focus on your **Circle of Influence**

8. IMPLEMENTATION PLAN

- Define **S.M.A.R.T. Objectives** for each goal = Specific, Measurable, Agreed Upon, Realistic, Timelines
- Define specific **Action Steps** to accomplish your objectives
- Track your measures: **Outputs / Outcomes**
 - *Outputs – What is produced to reach your objective (Examples: survey tools, evaluations, articles, action steps, etc.)*
 - *Outcomes – The overall accomplishments, objectives or goals which documents, validates or proves the success of the initiative.*

9. ONGOING - SET UP REGULAR MEETINGS TO CHECK PROGRESS

- Bring the team together for meetings to check progress, celebrate milestones, adjust for changes, problem solve and keep activities on track.

50,000 Foot Overview...

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**NEW
INITIATIVE**

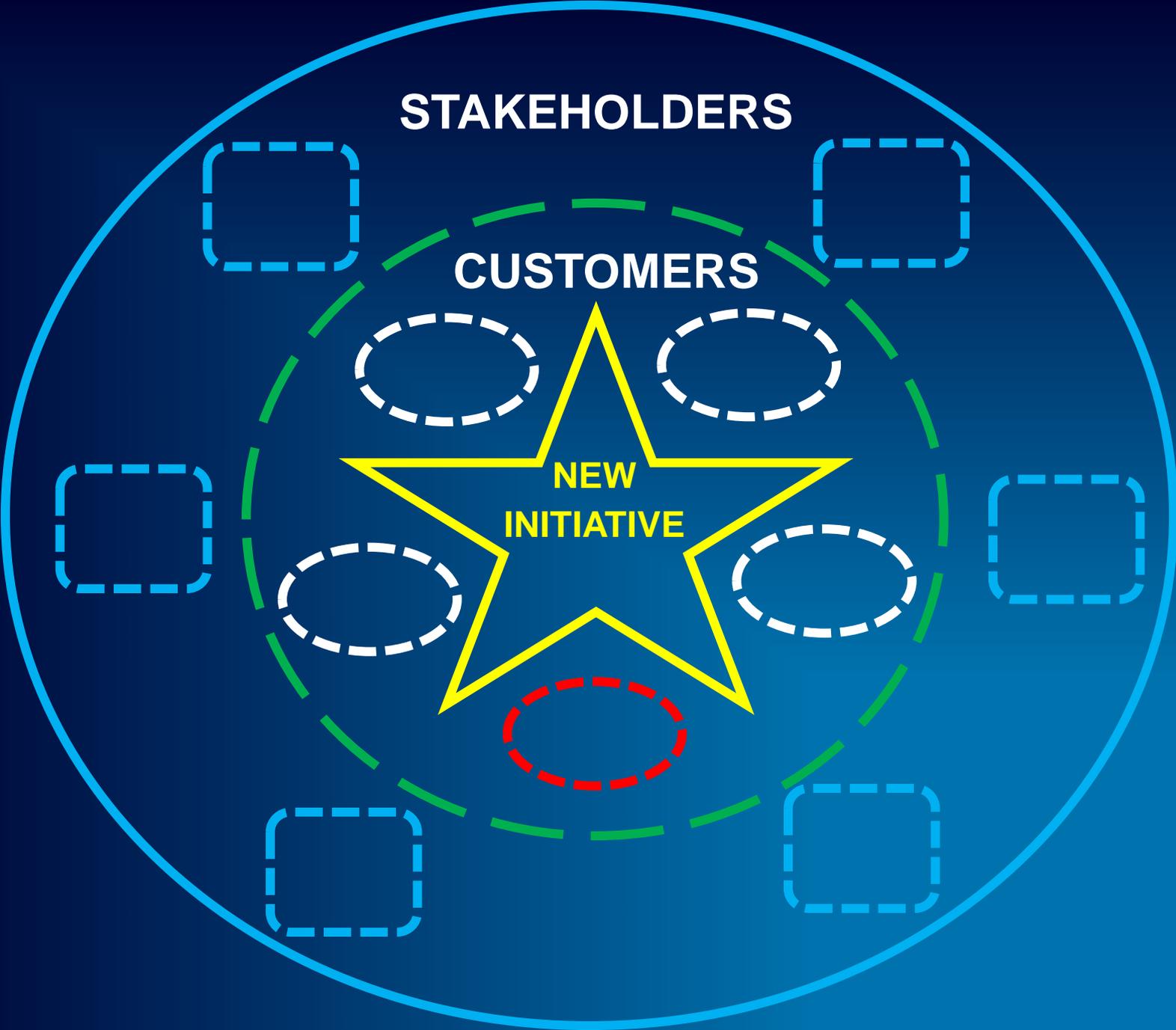




STAKEHOLDERS

CUSTOMERS

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SWOT Analysis

		EXTERNAL ENVIRONMENT	
		OPPORTUNITIES	THREATS
INTERNAL ENVIRONMENT	WEAKNESSES		
	STRENGTHS		

SWOT Analysis

		EXTERNAL ENVIRONMENT	
		OPPORTUNITIES	THREATS
INTERNAL ENVIRONMENT	WEAKNESSES	Explore	
	STRENGTHS		

SWOT Analysis

		EXTERNAL ENVIRONMENT	
		OPPORTUNITIES	THREATS
INTERNAL ENVIRONMENT	WEAKNESSES	Explore	
	STRENGTHS	Go For It !!	

SWOT Analysis

		EXTERNAL ENVIRONMENT	
		OPPORTUNITIES	THREATS
INTERNAL ENVIRONMENT	WEAKNESSES	Explore	Think Twice !!
	STRENGTHS	Go For It !!	

SWOT Analysis

		EXTERNAL ENVIRONMENT	
		OPPORTUNITIES	THREATS
INTERNAL ENVIRONMENT	WEAKNESSES	Explore	Think Twice !!
	STRENGTHS	Go For It !!	Challenge

30,000 Foot... Define Initiative...

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10,000 Foot Going to Ground... Develop Process...

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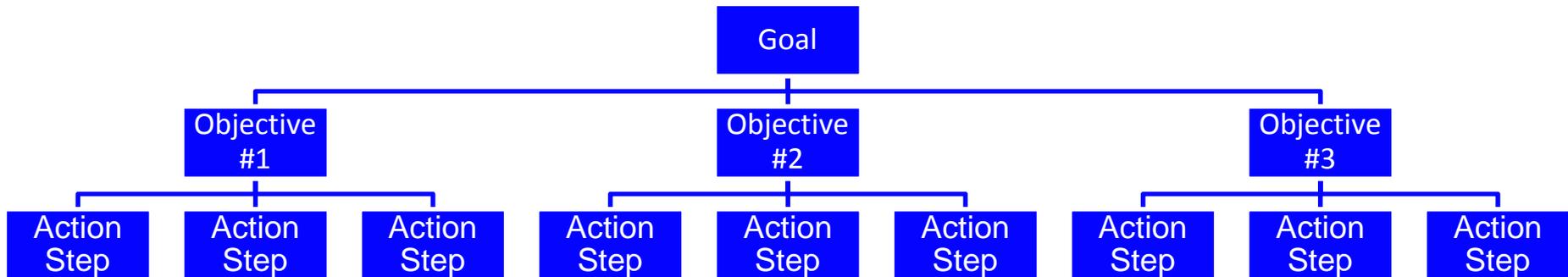
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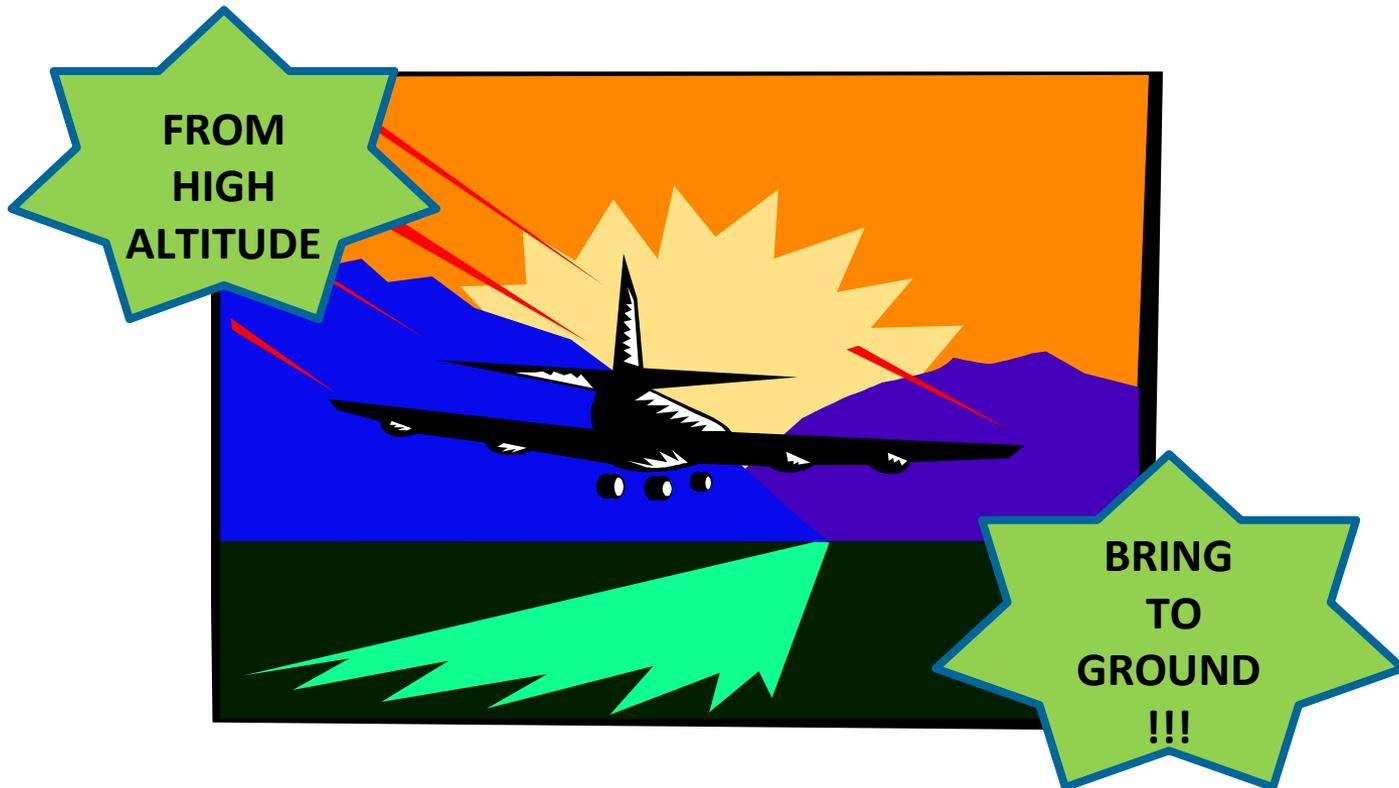
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During RC2...

4 Strategic Planning Groups

Goal: Develop 4 model strategic plans
for palliative care

Objectives:

Experience a guided approach to
strategic planning

Practice facilitation skills

Present a summary of your strategic plan
(Friday)

Develop 4 Strategic Planning Models for Palliative Care

Developing and marketing:

- 1. A hospital-based consult service**
- 2. A homecare program**
- 3. A regional or national association**
- 4. An educational program**

Process...

- **Worksheets to guide the process**
 - Model the process**
 - Model the questions to be answered**
- **Recorder writes key questions and content on worksheets each day**
 - Copies to everyone in the group**
 - Print neatly**
 - LDI Team will transcribe**

...Process...

- **Friday...**

**Team presentation = Summary of
your strategic plan**

Use LDI slide template – be creative

20 minutes

Questions

Discussion of all 4 plans & experience

...Process

- **Twice daily debriefing about group process**

Facilitation

Effect of MBTI

Result

- 4 exemplary strategic plans for you to take home

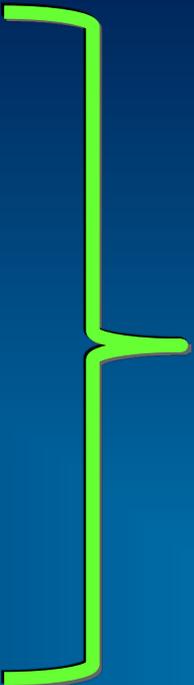
Worksheets

Summary presentations

**Let's break
into groups...**

Group Facilitation

- Facilitator
- Recorder
- Time Keeper
- LDI Team Guides



Rotate daily

**Group 1:
Inpatient PC
Consult
Service**

**Ali
Anjum
Esther
Snezana
Thinh
Bart
Roberto
Liliana**

**Group 2:
Home PC
Service**

**Cuong
Dinesh
Israel
Rumana
Shoba
Silviu
Carl
Mhoira
Eileen
Deborah / Holly**

**Group 3:
National PC
Association**

**Bishnu
Charmaine
Dilsen
Marta
Nicolas
Eric
Mark
Jamie / Frank**

**Group 4
PC
Curriculum**

**Chitra
Eva
Leonardo
Narine
Odontuya
Samuel
John
Lucas
Raj
Shannon**



OhioHealth

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Gandhi...

*You need to be the change
you want to see in the world...*

**Kobacker House
Columbus, Ohio**

