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# Strategic Planning

## WHERE TO BEGIN, AND DIFFERENT WAYS TO DEVELOP A STURDY PLAN



By Georgina “Gigi” Rodgers, Director of Clinical Cancer Services, Cleveland Clinic, OH.

**S**trategic planning provides us with the framework to drive change and meet our broader, long term vision. Through phases of work we are able to articulate our vision into strategic initiatives and tactical pathways to meet these goals from the front line through the C-Suite. One of the most important aspects of strategic planning is to ensure that the plan is a living, ever changing document that involves periodic review to determine overall progress and a high level refresh as goals are met and new goals emerge. Even the best plan will make no headway if it is gathering dust on a shelf.



It is important to take into consideration the current state of the organization or department to evaluate the necessary milestones to reach the desired future state. In order to execute a solid strategic plan, it is essential to include appropriate stakeholders.

### Quick start questions

*“What are the most significant challenges we face over the next 3+ years?”*

*“What are the top priorities within the identified challenges?”*

*“Who are the key stakeholders that can help drive the changes required?”*

There are multiple ways a practice or organization can go about developing a strategic plan and the right approach can make or break the development and sustainability of your plan. Below, I will describe three scenarios that I have been involved in over the year and the differing outcomes from the approaches.

**Scenario 1:** Our health system has a collaborative

group of oncology nursing stakeholders that meet on a bi-monthly basis to develop initiatives pertinent to oncology patient care and education as well as nursing practice and education. Our group at the

time consisted of Nurse Educators, Pharmacists, Clinical Managers, Clinical Nurse Specialists, and front line nursing Team Leaders. The group attempted to develop a plan for 2010 but the efforts were without the assistance of any internal or external resources familiar with continuous improvement processes, facilitation, and most importantly, strategic planning. The plan was developed by a small group of stakeholders and didn’t necessarily include personnel that would be responsible for executing the plan. Once the plan was developed, we did not have a structure in place to ensure accountability and follow through for specific tactics.

*“One of the most important aspects of strategic planning is to ensure that the plan is a living, ever changing document”*

There were employees assigned to items within the plan but we did not track progress at specific intervals and the plan sat mostly idle. It became evident that the lack of appropriate stakeholders, accountability and clearly actionable items were leading us down a dead end path. We were eager in our attempt but it wasn't a surprise when we fell short in meeting our goals and executing the plan.

**Scenario 2:** In this particular scenario, our cancer center did not yet have embedded resources or significant experience in strategic planning and we were making our initial attempt as a cancer institute to develop one. In this scenario, we contracted with an external consulting company to help facilitate and guide our plan. The consulting team had experience in the strategic planning process and in oncology and they walked our multidisciplinary teams through each step of the planning process. They provided us with a fresh look at our business through their objective eyes. The utilization of a third party consultant to assist us was vital to our success and helped us build the foundation for future iterations of plans. The knowledge and experience of an experienced consultant assisted us with collection and analysis of information, benchmarking data and clear focus on development of our overall plan. Our teams gained valuable knowledge and insight during this process that afforded us the ability to sustain lasting impactful changes.

*“the right approach can make or break the development and sustainability of your plan”*

built off of enterprise goals and drilled down into key performance indicators and specific activities that would be necessary to accomplish the initiatives. In this scenario, we had the advantage of a dedicated strategy department and experienced continuous improvement specialists directly embedded in our day to day operations. Our enterprise strategy department develops high level goals that are then filtered into priorities (e.g. access to care, high reliability.) Within our cancer institute key stakeholders met to develop key process indicators, initiatives and specific tactics to achieve the prioritized goals of the health system. The process that we used was much more formalized and by incorporating a cadence of follow up meetings through monthly scorecard and business operations reviews, we have been able to continually hold responsible parties accountable for action items and track overall progress.

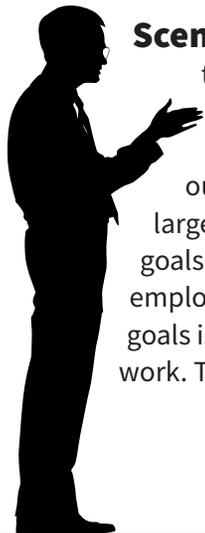
In the scenarios above, I've explained some of the pearls and pitfalls in my experiences during the strategic planning process. If you do have experienced resources within your practice or organization, take advantage of them as you plan and maintain your strategic plan. Don't hesitate to seek out the assistance of a qualified consulting firm to help build and maintain your plan. These resources can be relied upon to sustain focus, maintain accountability and ensure that the plan is updated.

### *What will you do to prepare for a successful strategic planning process?*

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**Scenario 3:** In this final scenario, our teams had built on the infrastructure and knowledge we gained from utilizing consultants. It began with our clinical institute working with the larger health system to align strategic goals from leadership to the front line employee. The purpose of aligning our goals is to connect every caregiver to the work. The strategic agenda process was



#### About Oncology Management Consulting Group

For more than 18 years, Oncology Management Consulting Group has provided the finest professional consulting services to oncology providers across the US. Our highly knowledgeable consultants are nationally recognized specialists that assist organizations to achieve their business goals and to maximize their organizational performance. With solutions tailored to each client's very precise needs, OMC Group offers the leadership, vision, and collaboration that oncology organizations need to adapt to and to succeed in the rapidly changing healthcare industry. **Learn more at [www.oncologymgmt.com](http://www.oncologymgmt.com).**