Building An Annual Strategic Plan

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Financial Disclosure

Mike Trier - No Financial Interest

- CEO of Horizon Eye Specialists & LASIK Center and Eye Surgery Center at the Biltmore in Phoenix, AZ
- Executive Director of Assil Eye Institute and 90210 Surgery Medical Center in Beverly Hills, CA

Financial Disclosure

Kurt Wankier - Yes
- President, Envision Management & Marketing, LLC
- President of iSee by Envision Metrics, LLC

How Many of Us Work in an Environment with this Approach to Decision Making???

Building a Road Map to Success
Step #1: Begin with Your Foundations

**MISSION**

**Vision**

**VALUES**

What do we see as our ultimate destination as an organization?

**Mission**

Horizon Eye Specialists & LASIK Center is dedicated to providing our patients, our colleagues, and the Phoenix community excellence in care with every interaction.

**Vision**

Envision Management & Marketing LLC is committed to leading clients success by enhancing the strategic vision, operational effectiveness, and marketing superiority.

**Vision**

The #1 Refractive Surgery Customer Relationship and Marketing Management solution.

**Mission**

Envision Management & Marketing LLC is committed to leading clients success by enhancing the strategic vision, operational effectiveness, and marketing superiority.
Horizon Eye Specialists & LASIK Center Provides Eye Care Like No Other.

Vision

Values

What values do our doctors and staff share and plan on relying on in reaching this Vision destination?

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Clinical Excellence

To be the best in medicine, HESLC doctors and employees are committed to Clinical Excellence, which is providing our patients the highest quality of care during each visit to our practice.

Innovative Care / Cutting Edge Technology

Premier practices like HESLC provide their patients Innovative Care. We strive to utilize cutting edge and proven techniques of care customized to each patient.

Fabled Service

Exceeding the demands of our patients and colleagues through Fabled Service is expected from each HESLC employee. This means anticipating a patient’s needs before they even know their needs.

Efficiency

In order to help our patients keep up with their busy lifestyles, HESLC must run like clockwork with daily Efficiency in clinic flow, reception interactions, optical service, business transactions, and financial soundness.
Teamwork

The cornerstone of reaching the above mission, vision, and values is Teamwork. We are a practice which will succeed best when working together focused on our common goals.

Values Questionnaire

1. What is/are the doctor(s)/partners’ most dominant personality trait/s?

2. What is/are the doctor(s)/partners’ primary motivators (money, acclaim, skill, etc.)?

3. Outside of work, what are the pursuits/goals of the doctor(s)?

4. What about my goals/career ambitions agree with or vary from those of the doctor(s)/owner(s)?

5. Compared to other well-known quality employers, how committed are we to personnel development & growth?

6. What level of intensity will it require to meet our vision, and am I physically/mentally up to the task?

Step #2: Set This Year’s Strategic Goals

1 to 5 Overarching Goals

Be As Specific in Your Targets As You Can

Doctors’ Personalities will impact how specific you are able to get

Do Your Homework

- Obtain data on the macro (overall) economic conditions now and most likely in six months
- Obtain data on the micro (local market) economic conditions now and most likely in six months
- Be current on industry trends (technology, devices, revenue sources, ad & marketing, etc.)
- Know your competitive advantage in the market
Examples of Strategic Goals

Growth Targets (revenue, surgeries, or visits)

Examples of Strategic Goals

New Doctors (Specialties)

Examples of Strategic Goals

New Service Line

Examples of Strategic Goals

Key Process Changes to Implement ICD-10 - example for 2014

Examples of Strategic Goals

Key Staff Development or Culture Initiatives

Examples of Strategic Goals

New Office Location
Examples of Strategic Goals

New Key Equipment or Technology Start-Up

Surgery Center Development or Expansion

Major IT Project

Target for Patient Satisfaction Scores

Step #3: Establish Action Items for Each Goal

- Could be as few as a couple or as many as 16 to 20 action items
- Depending on size and scope of your practice
Components of Each Action Item

- **Description**
  - One to Two Sentences

- **Outcomes Measurement**
  - As Specific As Possible

- **Responsible**
  - Don’t complete without saying who is sheparding this work

- **Due Date**
  - Don’t complete without setting a target date
  - Remember you have 12 months to get it all done

Examples of Action Items

**2009: Goal #1: HESLC Will Grow 20%**

*Continue to Increase Doctor Accessibility at SCP and PSC Office to Decrease Schedules to Within Two Weeks or Less*

In the second half of 2008, we expanded all our doctors’ schedules at our SCP and PSC offices to draw down our appointment availability time. We will continued to adjust these schedules to get doctor accessibility within two weeks by the end the Spring.

**Outcomes Measurement**: PSC and SCP schedules with two weeks for all doctors.

**Responsible**: Mike Trier, Dr. Shirley Lambert and Barb Gross

**Due Date**: Spring 2009

**2012: Goal #2: Build Ease: HESLC Will Simplify Our Processes**

*Assess Our Patient Reminder Program*

We will study our current system for patient reminders and the services we use, along with all potential services that could be provided by the company who provides this for our practice. We want to find a company which can add email and text reminders of upcoming appointments along with phone calls.

**Outcomes Measurement**: This review is completed with plan set to expand our reminder system.

**Responsible**: Joey Harte and Barb Gross

**Due Date**: 3rd Quarter 2012

Examples of Action Items
2011: Goal #1: HESLC Will Grow. We Have Set Targets of a Revenue Level in 2011.

Move Peoria Office to New Location
HESLC’s Peoria office will be moved to a more visible location. We are finalizing these plans. Our interior plans are set. Sharona Optical displays are built and ready.

Outcomes Measurement: New Peoria office open

Responsible: Joey Harte and Mike Trier

Due Date: 1st Quarter 2011

2011: Goal #1: HESLC Will Grow 20%

Begin Ophthalmology Hours in Goodyear at West Valley Vision
Dr. McCulloch will begin seeing patients bi-weekly at West Valley Vision, to begin a Goodyear presence for the practice.

Outcomes Measurement: Clinics start at West Valley Vision

Responsible: Dr. Robert McCulloch

Due Date: February 2009

2010: Goal #4: We Will Continue Automating Our Clinical and Business Processes.

Add Cirrus OCT at Allied Way
A new Cirrus OCT has been ordered for Allied Way. We will then be shifting our current OCT to the Peoria office.

Outcomes Measurement: New Cirrus OCT installed at Allied Way

Responsible: Mike Trier

Due Date: March 2010

2009: Goal #1: HESLC Will Grow 20%

Recruit Glaucoma Specialist to Replace Dr. Pat Aiello
Dr. Aiello is leaving the practice to begin a practice in Yuma. We will be recruiting a glaucoma specialist to replace Dr. Aiello and build this specialty in the practice.

Outcomes Measurement: Glaucoma specialist begins practice

Responsible: Mike Trier, Dr. McCulloch, and Dr. Feller

Due Date: August 2009

2009: Goal #1: HESLC Will Grow 20%

Begin Ophthalmology Hours in Goodyear at West Valley Vision
Dr. McCulloch will begin seeing patients bi-weekly at West Valley Vision, to begin a Goodyear presence for the practice.

Outcomes Measurement: Clinics start at West Valley Vision

Responsible: Dr. Robert McCulloch

Due Date: February 2009
Examples of Action Items

2009: Goal #2: Our Growth Will Occur as HESLC Evolves to a Culture of Excellence Focused on Our Patients. We Plan to Build a “HESLC Experience” That WOW’s and Increases Patient Satisfaction Above 95%.

Update HESLC Website
HESLC’s website is being updated - adding information on HESLC’s name change and the new Allied Way office. The website will be restructured to a more appealing and patient focused structure with doctor profiles updated, employee profiles added, expanded information on our facilities, patient tools developed in the future, Sharma pages included and new education pages will be added with use of EyeMagnations education tools.

Outcomes Measurement: Update of HESLC website completed

Examples of Action Items

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Outcomes Measurement: Update of HESLC website completed

Examples of Action Items

2012:
Goal #2: Build Ease: HESLC Will Simplify Our Processes

Improve On New EMR Module
Now that we are active on the new EMR system, we will still work to make any necessary changes to the EMR pages to gain efficiencies from this new system. During the last quarter of 2011 and likely first quarter of 2012, Dr. Jeff Girardin will continue to provide Management Plus and Catalyst change requests routinely.

Outcomes Measurement: New EMR pages are

Examples of Action Items

2010:
Goal #1: HESLC Will Grow. We Have Set Targets of a Revenue Growth of 15% in 2010

Set Target Benchmarks for Lasik Lead Tracking Results and Track Results
In the last two months of 2009, Kurt Wankier worked with HESLC staff to set up a lead tracking program for HESLC.

Outcomes Measurement: Target benchmarks set and HESLC performing at target level by end of 2010

Responsible: Mike Trier with Kurt Wankier on setting targets and Kurt with Corinna Aviles in tracking results

Due Date: Targets set by February and monthly report on results after

Example of Strategic Plan

- Word template available from Kurt
- Email him at kwankier@emmcconsultants.com
Advice on Building Your Plan

- Be specific whenever you can
- Action items should be detailed and provide explanation on how it ties to achieving the strategic goal, if it is not obvious
- Seek collaboration from sources more experienced and more intelligent
- Know your team and make necessary personnel changes or assignment changes to accomplish the plan

Advice on Building Your Plan

- Only set goals and action items those implementing can achieve
  - You have higher chance of failure if you set goals for those above you, unless you have their buy-in
  - In some cases the action item may simply be an assessment of new equipment, services, satellite, marketing campaign that will be presented to those above you
  - Remember the serenity prayer - focus on what you can achieve
- Every action item needs to have someone responsible for stewarding it to completion
  - Once it is set, make sure those employees know their responsibilities

Advice on Building Your Plan

- Tailor the plan to the doctors, managers, or staff involved.
  - Some doctors need full details, other doctors find setting full details confining
  - If you plan to share this with your staff, write it in terms they understand and can apply to their daily work
- Each action item needs an outcomes measurement
  - You may struggle to find an measurement, but step back and look again
  - Even just completing an assessment is an outcome if you are serious in doing it

Advice on Building Your Plan

- Throughout the year, new unanticipated opportunities may arise. Do not let the plan limit taking action with these opportunities
- Simply assess whether the opportunity trumps other goals or action items
- Do the research

Do We Always Avoid This Outcome in Our Decision Making?

NO

But It Happens A LOT Less
With a Strategic Plan, We Have More Opportunities to Celebrate When We Accomplish Our Action Items and Achieve Our Goals. A Year End Review Can Be Very Rewarding!

With a Strategic Plan, We Are More Prepared to Weather A Storm.

We are what we repeatedly do. Excellence then, is not an act, but a habit.

Aristotle

Questions? Ideas? Input?