



Strategy Execution: Missed it by.....

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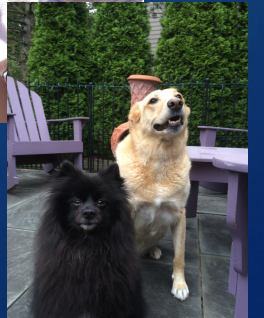
Agenda

- ▶ My Background
- ▶ Discussion Assumptions
- ▶ Executing Strategy
- ▶ Failure.....
- ▶ Pivot
- ▶ Changing the equation
- ▶ Success Factors, Considerations, Methodology
- ▶ Take Home Exercise
- ▶ Comments and Questions?



My Background

- ▶ Why Healthcare?
- ▶ Professional Background
 - ▶ Background in Surgical, IT, Finance and Strategic Transformation
 - ▶ Worked at local, regional and corporate roles for National Health Systems
 - ▶ Strategy, Transformational Change has been focus and mission
 - ▶ As Principal and CEO work at national and international roles
- ▶ Family



Assumptions

- ▶ Strategy has gone through planning, approved or in process.
- ▶ Financial planning is in process and/or complete.
- ▶ There are opportunities to implement strategy more effectively:
 - ▶ Moving or desire to move towards becoming higher performing organization
 - ▶ Increase capabilities towards successful implementations

Executing Strategy

70% of all
initiatives...
FAIL



What does it mean to Fail?

Fail to....

- ▶ **Achieved Planned Objectives:**

- ▶ Achieve Anticipated Benefits and Outcomes
- ▶ Within Scope
- ▶ On Time
- ▶ On Budget
- ▶ Anticipated Resources
- ▶ Maintained Operational Performance



The Top 10: *Causes according to Forbes*

10. Unrealistic goals, focus and/or resources
9. No Accountability or follow through
8. Ignoring facts, reality or assumptions
7. Wrong people in leadership, key positions
6. Inability or unwilling to change
5. Putting the plan on the shelf
4. Not having the right people involved
3. Lack of alignment, commitment or integration
2. Not focused on environment (culture, change and people) or results
1. The plan will take care of itself





Other Influencing Factors.....

Culture! Culture! Culture!

**Organizational culture eats strategy
for breakfast, lunch and dinner**

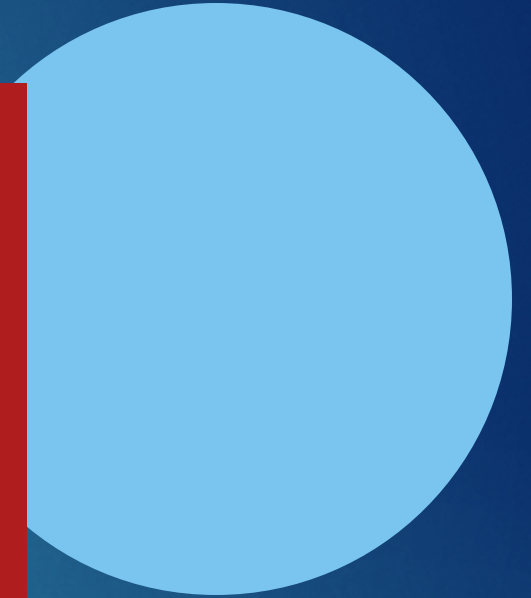


Culture

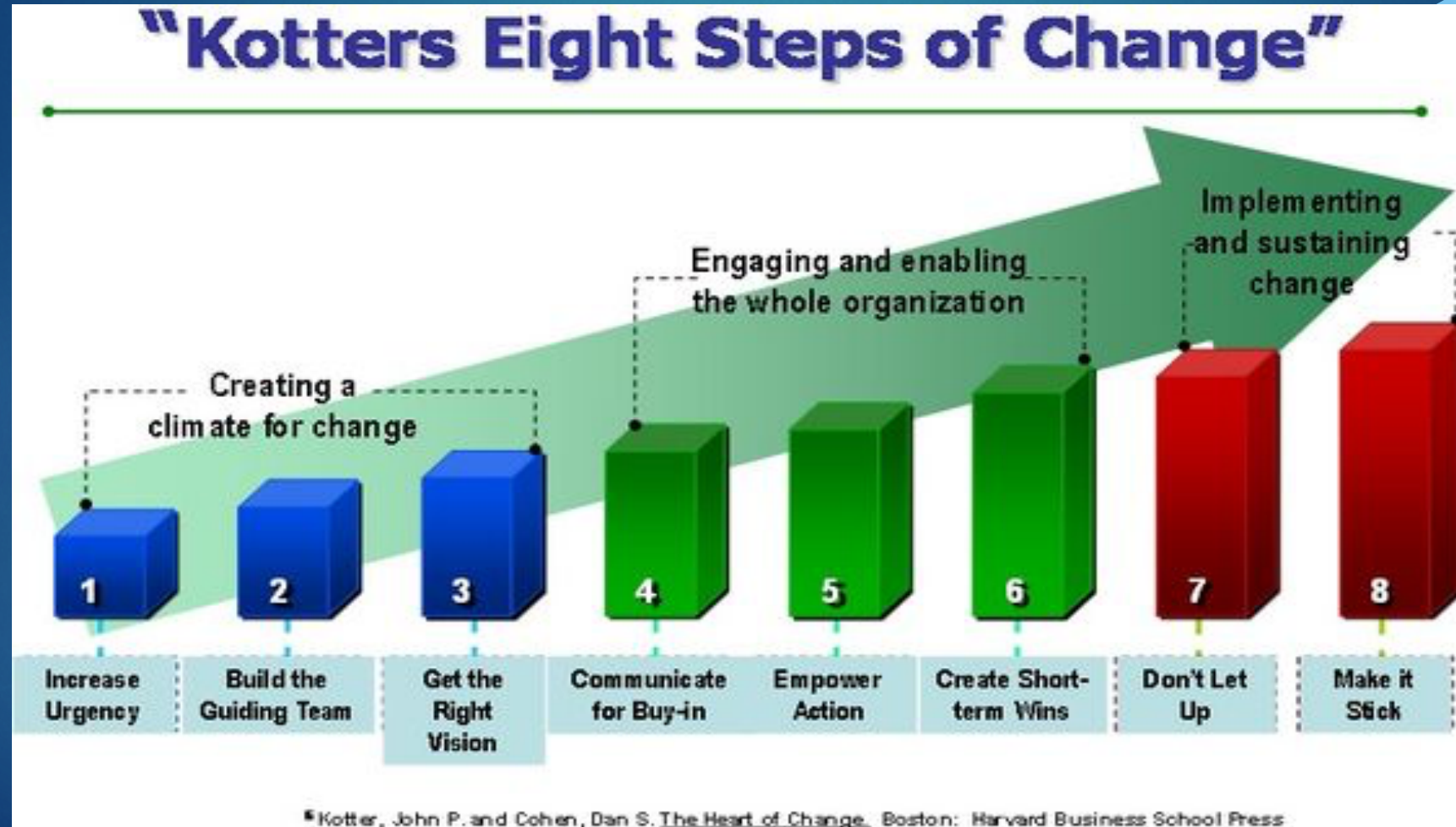
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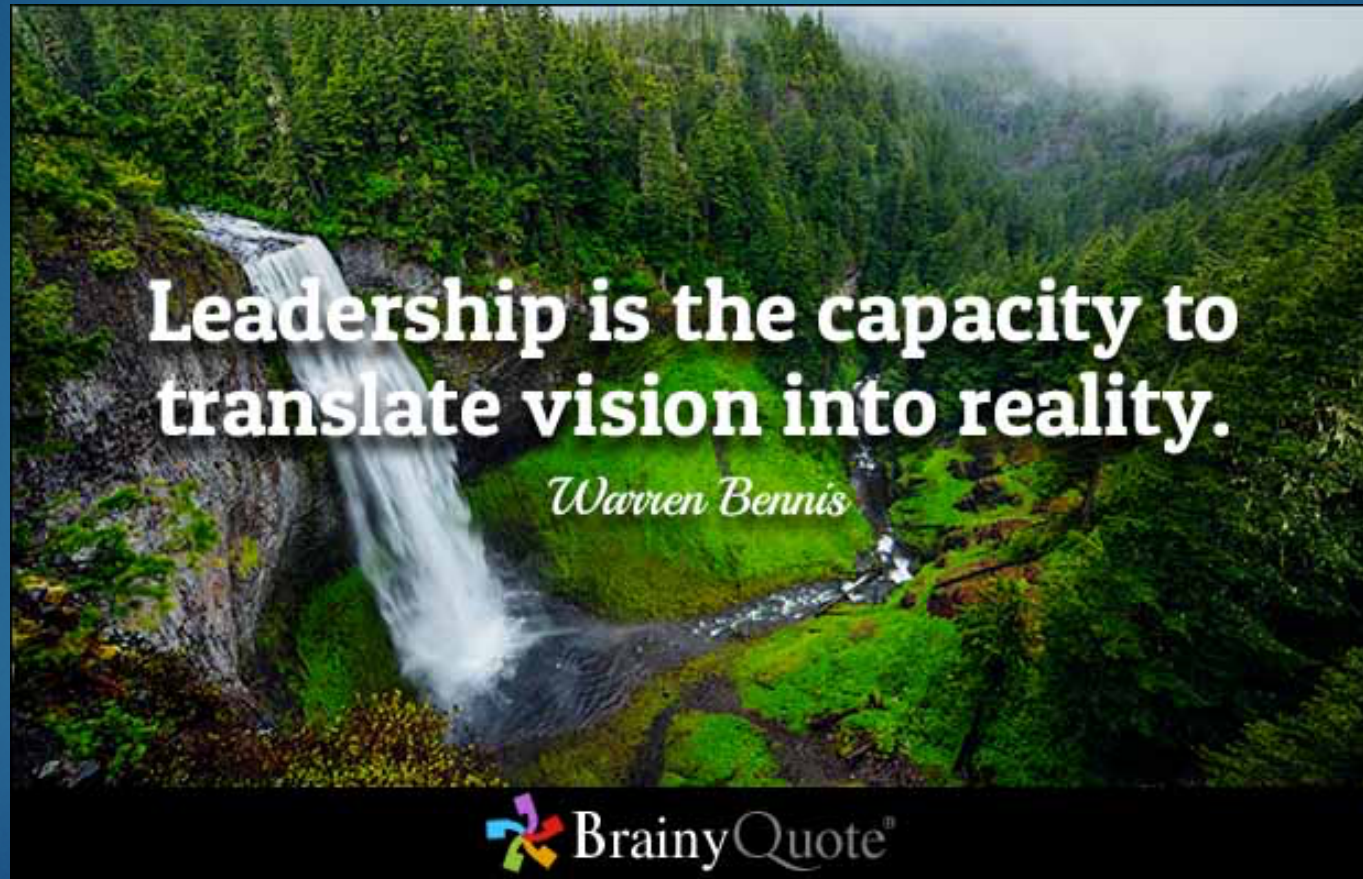
Strategy



Kotter Change Management Framework



Leadership



Changing the Equation



Critical Success Factors Pre-Planning

- ▶ What are the objectives, benefits, timing, costs?
- ▶ What is the current/desired culture and will this help move the organization?
- ▶ What leadership is needed for alignment/collaboration and who can be an integrated leader?
- ▶ What type of change is involved and who does it impact most?
- ▶ Who are the supporters and who are the resistors?
- ▶ What are some current organizational challenges (may or may not be related)?

Critical Success Factors

- ▶ Align strategy with mission, vision, operational tactics and processes
- ▶ Align strategy to culture and core values (take this out for a ride to improve culture)
- ▶ Align strategic goals with metrics, define measure for success
- ▶ Engage employees in planning
- ▶ Implement change management program throughout implementation
- ▶ Leadership-Accountability-Communication
- ▶ Current state/future state planning
- ▶ Implement strategic governance-keep it simple
- ▶ ***Be prepared to fix barriers and organizational challenges that will limit or halt – you will underestimate resistance to change in the organization***

The Paradigm Shift

Problem Solving

- ▶ Technology
- ▶ Process
- ▶ People
- ▶ Leadership
- ▶ Culture

Organize the Plan

- ▶ Culture
- ▶ Leadership
- ▶ People
- ▶ Process
- ▶ Technology



The diagram illustrates a paradigm shift in planning. On the left, two columns of factors are listed: 'Problem Solving' (Technology, Process, People, Leadership, Culture) and 'Organize the Plan' (Culture, Leadership, People, Process, Technology). Arrows from each of these ten factors converge on a central green box labeled 'Integrated Plan'. The box is stylized with a folded corner and is set against a light blue circular background. A vertical yellow bar is visible in the top right corner of the slide.

Integrated Plan

Dealing with the Top 10

Top 10

- ▶ The plan will take care of itself
- ▶ Not focused on culture, change, people
- ▶ Lack of alignment, commitment, integration
- ▶ Not having right people involved
- ▶ Putting plan on shelf
- ▶ Inability/unwilling to change
- ▶ Wrong people in leadership/key roles
- ▶ Ignoring facts/realities/assumptions
- ▶ No accountability or follow through
- ▶ Unrealistic goals, focus, resources



Actions

- ▶ *Develop Comprehensive Integrated Plan:*
 - ▶ *Change Management*
 - ▶ *Measurable Milestones, Actions, Deliverables*
 - ▶ *Executive Deliverables*
 - ▶ *Assessments on change, leadership, organization*
 - ▶ *Transparent Accountability to Executive Team, Board, Stakeholders, Organization*

Considerations for Integrated Plan

Culture

Assess and Define desired organizational culture

Develop specific plans to move culture forward as part of strategy

Develop approach/training if applicable

Develop measures to monitor progress

Assess and adjust

Leadership

Develop Accountable Exec and Collaborative Exec Roles

Define Key Stakeholders

Establish Governance and Strategic structure

Pace the organization

Establish accountability

Track operational indicators at risk

Dedicate resources

Change

Develop Communication plan including change management

Create sub strategies as appropriate

Process maps: simulate, test and train current and future state

Mission, Vision and Values are incorporated

Reward and celebrate success

Consider pilots

Organizational Support

Integrated Plan: Tasks, Milestones, Deliverables, Resources, Program Reporting/Transparent

Support: Process Improvement, Change Management, Program Management

Method on a page.....

Alignment Awareness

- Align to Culture, Core Values, Mission, Vision, Goals
- Align and engage Leaders, Organization, Stakeholders, Employees, Other related initiatives
- Leadership/Accountability
- Assessments
- Establish Governance
- Establish foundation: process improvement, chg mgmt, program mgmt

- Communication Plan
- Leadership /Champions
- Integrated Plan
- Executive Deliverables
- Management Status Reporting

Operational Readiness

- Current/Future State
- Assess People Impact
- Assess/Manage Operational key indicators
- Incorporate plans for testing, process improvement, change mgmt, culture
- Policy, roles, agreements revisions

- Gaps: Process, Leadership, Culture, Technology
- Integrated Plan with "Mind the Gap"
- Culture, Change, Improvement Checkpoints-"the end in mind"

Activate with Benefits

- Testing, Training, Simulate, Activate
- Mitigate Operational Gaps/indicator performance
- Success factors/Benefit validation
- Manage and monitor progress

- Simulate, Test, Train, Adjustments, Activate
- Measure in time intervals success and operational indicators
- Validate success and monitor progress
- Hand offs

Take Home Homework/Exercise:

- ▶ Review current organizational strategies planned for future implementation-can be in next few months or next year
- ▶ Rate each strategy on impact to the organization (the anticipated benefits=high, medium, low)
- ▶ Rate each strategy on what it will take to implement (desired culture, leadership, change, resources=high, medium, low)
- ▶ If the answer to both is in the high range, then it would be worth evaluating this approach and targeting one initiative to begin and grow this approach and capability within the organization.

Q&A



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