Strategic Planning in the IDS: Tips to Pull Physicians into the Planning Process

Strategic planning is a map to where you want your organization to go. In an integrated health care delivery system (IDS), the employed physicians are key players in executing a strategic plan.

The best way to bring physicians on board to help develop and carry out a plan is to engage them in the planning process from the beginning.

IDS physicians, and especially physician leaders, who buy into the strategic planning process are more likely to:

• Look to the plan’s strategies as a blueprint for the business and marketing plans of their IDS-owned medical practices;
• Align their clinical approaches with the plan’s goals; and
• Contribute to making improvements and changes to the plan as needed.

The Strategic Cycle

A viable strategic plan is more than a list of assignments and due dates; it is the beginning of a continuous cycle of management (see The Strategic Cycle).

The cycle starts with strategic thinking – viewing the organization from an outside perspective to see its strengths and weaknesses. Next comes strategic planning – assessing the organization’s core values and mission, defining its goals and action plans, establishing timelines, and assigning responsibilities for results. Then, the cycle moves to strategic management – completing the goals, establishing reporting mechanisms to measure progress, making corrective actions, and keeping stakeholders informed of results. Finally, the cycle returns to strategic thinking where results are reviewed, tested, and assessed against the IDS core values and mission.

Getting Physicians Involved

Here are some time-tested methods to inspire IDS physicians to be key players at every step of the strategic cycle:

Set expectations
Reach out to physicians through regular meetings, personal contacts and other channels. Let physicians know what level of participation they can have in the planning process and how they may assist the plan’s development. Be clear and do not over-promise. Work with the physicians and select one or more to be part of the strategic planning retreat where top leaders hash out the plan’s details.

Gather information
Develop a questionnaire and ask physicians at each practice site to complete and return in confidence. Questions to ask include:

• What does the IDS do well?
• How can the IDS do a better job of serving the community?
• Where can the IDS make improvements for both the physician’s practice site and the community at large?
• What do the physicians perceive are the strengths, weaknesses, opportunities and threats to their practice unit and to the IDS at large?
Ask the physician leader and top administrative leader at each IDS practice site to encourage physicians to complete and return these confidential questionnaires.

Recruit
Find a physician leader from each practice in the IDS who can represent his or her colleagues’ views. This recruitment step may also help to spot emerging physician leaders whose leadership qualities and talents can be further developed.

Conduct a Gap Analysis
A gap analysis can show the differences between desired outcomes and actual results for the entire IDS – gaps which the strategic plan must address. Conducting the analysis and sorting out its results are where an experienced outside planning consultant can help. The physician representatives you’ve recruited can help relay their colleagues’ perspectives at this step. Ask these leader/representatives to:

- **Identify needs.** Ask them to take a 30-thousand foot-level view of the major issues affecting their practices.
- **Determine resources.** Ask what resources physicians in their practices need from the IDS to meet the needs, goals, etc., identified in the previous step.
- **Discover causes of gaps.** Ask what gets in the way of physicians reaching their desired outcomes. Is it a human resources issue? An IDS policy? Or something else?
- **Create a preliminary priority list.** Ask for physicians’ priorities for change and improvement. The list should be based on conclusions reached in the previous three steps of the analysis.

Share Gap Analysis
The gap analysis for the entire IDS will include an assessment of the hospital, ancillary and other entities as well as the physician practices. At this point, you must stress to all involved that the themes identified in this internal document are confidential and will not necessarily be turned into goals or actions. The document at this point should be considered a preliminary list of what the IDS believes is important and can support. Ask physician leaders to list their concerns about the goals and commitments required to achieve them. Expect some to focus on the issues related to their practices or specialties. All the same, keeping these leaders involved in the process will help them to carry the torch for the plan when it is developed and finalized by the IDS top leadership.

Keep Communicating
Use multiple pathways to disseminate information about the plan as it progresses. You may have to use a combination of written communication (paper or e-mail), face-to-face discussions, meetings, even phone calls to reach the physician leaders at the practices consistently.

Finally, resist holding too many meetings with physicians about the planning process, especially if your compensation system does not adequately compensate them for time spent in non-clinical activities.