Achieving Alignment through Integrated Strategic Planning

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Why a *Strategic Plan*?

- It is a roadmap - it defines:
  - *Why* we exist
  - *What* the future direction is
  - *How* will we get there?
- It helps align and mobilize the whole organization to achieve common goals
- It focuses the efforts of the organization and helps leverage human, organizational and financial capital
- It engages the people in the organization because they can see the “golden thread” between the Vision and their work
- Makes sense for any organization, large or small
- Has a defined timeframe – often 5-7 years
Strategic Planning Framework – the Golden Tread

Strategic Plan:
- Mission
- Vision
  - Strategic Priority
  - Strategic Priority
  - Strategic Priority
  - Strategic Priority
    - Strategic Initiative ~ 4-6
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      - Tactics ~ 4-6
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      - Tactics ~ 4-6
        - Departmental Objectives
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        - Departmental Objectives
          - Individual Goals and Objectives
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          - Individual Goals and Objectives

Operating Plan:
- Departmental Objectives
- Departmental Objectives
- Departmental Objectives
- Departmental Objectives

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Strategic Planning Framework – Mission

Strategic Plan:

- Strategic Priority
  - Strategic Initiative ~ 4-6
    - Tactics ~ 4-6
      - Departmental Objectives
        - Individual Goals and Objectives

Operating Plan:

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What is a *Mission*

The Mission

- describes why the organization exists – it’s purpose or raison d’etre
- describes how the organization is integral to the broader community within which it sits
- does not have a defined timeframe - is enduring; some Missions remain the driving force for organizations for many generations
Example Missions

Museum of Science and Industry
   *Inspire the inventive genius in everyone*
Chicago Architecture Foundation
   *The Chicago Architecture Foundation inspires people to discover why design matters*
**ABMS Mission Statement (old)**

**ABMS Mission as stated in the ABMS Bylaws revised July 2, 2012**

Section 1.2. Mission. The American Board of Medical Specialties (ABMS) is an organization of medical specialty boards with shared goals and standards related to the certification of medical specialists. Certification includes initial specialty and subspecialty certification and maintenance of certification throughout the physician’s career. The mission of the ABMS is to maintain and improve the quality of medical care by assisting the Member Boards in their efforts to develop and utilize professional and educational standards for the certification of physician specialists in the United States and internationally. The intent of both the initial certification of physicians and the maintenance of certification is to provide assurance to the public that a physician specialist certified by a Member Board of the ABMS has successfully completed an approved educational program and evaluation process which includes components designed to assess the medical knowledge, judgment, professionalism and clinical and communication skills required to provide quality patient care in that specialty. The ABMS serves to coordinate the activities of its Member Boards and to provide information to the public, the governments of the United States and other countries, the profession and its Members concerning issues involving certification of physicians in the United States and internationally.
ABMS **Mission Statement (current)**

**ABMS Mission**

The mission of the American Board of Medical Specialties (ABMS) is to serve the public and the medical profession by improving the quality of health care through setting professional standards for lifelong certification in partnership with Member Boards.

*Adopted April 24, 2014*
Identifying your Mission

If your Mission needs to be refreshed or reconsidered, working with your colleagues as a Strategic Planning team, and ideally in a facilitated process,

Search for your Why

1. Start by asking “What does the world need from this organization?” and
2. What is our work integral to in the world or in our sector?

The idea is to find your purpose, and purpose is always dependent on being integral or critical to something bigger

Continue the dialogue related to purpose until your Mission resonates with your Planning team
S.W.O.T Analysis – *Fodder for the Strategic Plan*

**External Landscape**
- Opportunities
- Threats

**Internal Assessment**
- Strengths
- Weaknesses

**Vision**
- Strategic Priorities
- Strategic Initiatives
Strategic Planning Framework – Vision

Strategic Plan:
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Operating Plan:
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What is a **Vision**?

The Vision

- answers *What* the organization does to bring its mission to life
- keeps the organization relevant
- is compelling - is the most powerful motivator in an organization
- is often stated in current state terms, but from the perspective of some future state time, often 5-7 years
- ideally is simple, understandable and easy to share in an elevator
Example **Visions**

Museum of Science and Industry
*To inspire and motivate our children to achieve their full potential in science, technology, medicine, architecture and engineering*

Chicago Architecture Foundation
*The Chicago Architecture Foundation is the portal for exploring Chicago and the design of cities everywhere. CAF enhances Chicago’s prominence as a center of architectural innovation and a model of city life. As a forum for the exchange of ideas, CAF stimulates public awareness, sparks solutions, and inspires participation in the design of vibrant communities.*

ABMS
*ABMS will be a leader in improving the safety and quality of medical care through the policies of ABMS and the physical certification processes of Member Boards.*
Working with your colleagues as a Strategic Planning team, and ideally in a facilitated process:

1. Pick a time in the future – 5-7 years out, close your eyes and envision a desired future with some prompts such as:
   - What is your organization known for?
   - How is it manifesting its mission?
   - How is the changing landscape affecting your organization, and how is your organization affecting its surround?
   - As you walk through your organization, what is happening?
   - As you interact with staff, what do you talk about?
   - As you interact with members, what do you talk about?
   - As you interact with external stakeholders (patients, hospitals, others focused on healthcare), what are those interactions?
   - How has your organization made an impact?

2. Use your thoughts to create a visual image of your future state

3. Mine the image(s) for key concepts

4. This is the start of your future state Vision
Strategic Planning Framework – Strategic Priorities

Strategic Plan:
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Operating Plan:
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What are *Strategic Priorities*?

Strategic Priorities

- High level focus areas for the organization – those major endeavors necessary to fulfill the Mission and achieve the Vision
- All the work of the strategic and operational plan flow from the Strategic Priorities
- Have a defined time horizon – often 5-7 years
- When complete, Strategic Priorities:
  - Clarify the “buckets” of work
  - Feel balanced
  - “Hang together” well
  - Are articulated at the same “level”
  - Are Integrated (not siloed)
Example *Strategic Priorities*

Museum of Science and Industry  
*Priority 1: Become the foremost experiential science educator*

Chicago Architecture Foundation  
*Priority 1: Engage Chicago’s neighborhood communities in their own built environments*
Example *Strategic Priorities (aka Goals)*

ABMS Priorities (aka Goals)

- **Goal 1**: Be the premier system for domestic physician certification.
- **Goal 2**: Enhance the value of continuing certification to the public, diplomates and other stakeholders.
- **Goal 3**: Establish ABMS as a national thought leader.
- **Goal 4**: Expand international physician certification through the ongoing development of an excellent system.
- **Goal 5**: Establish ABMS’s role in research and scholarship.
- **Goal 6**: Enhance organizational, operational, and financial performance.
ABMS 2018 Strategic Priorities
## INNOVATIVE ASSESSMENT

<table>
<thead>
<tr>
<th>Goal #2</th>
<th>Enhance the value of continuing certification to the public, diplomates and other stakeholders.</th>
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<tbody>
<tr>
<td><strong>Tactic 2-C</strong>: Develop and implement an integrated multi-channel marketing and communications strategy that promotes the value of ABMS Member Board certification to the public, diplomates and other stakeholders. This strategy will align and integrate the engagement and legislative strategic plans.</td>
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### Action Steps and Initiatives

- Develop and execute a multi-channel consumer awareness and education communication campaign that increases the public's value and understanding of Board Certification. This campaign will target selected consumer segments, consumer advocacy and affinity groups and will include a robust social media focus.

- Redesign and launch ABMS Certification Matters website, including a mobile focus.

- Develop and execute a dedicated physician campaign promoting Boards Certification that increases awareness, understanding and the value of Board Certification.
Identifying your Strategic Priorities

Working in your planning group:

1. Start with your future state Vision as your destination, and ask:
   - What do we need to be great at in order to achieve our Vision? These are the Capabilities that you will need going forward.

2. From your Capabilities, and going back to your S.W.O.T. identify the 4-6 major priority areas, that if you completed would move you substantially toward your Vision. Use your thoughts to create a visual image of your future state

3. Clarify your Strategic Priorities
   - Description - Develop a 50ish word description for each Strategic Priority
   - Criticality - Articulate why each Priority is critical to achieving your Vision
   - Outcomes – Identify the desired outcomes and measures of success of each of your Priorities
ABMS 2018 Strategic Priorities

- National Thought Leader
- Global Impact
- Expanded Influence
- Innovative Assessment

- Communication Strategy
- CertLink™
- Future Vision for Certification

- External Engagement and Legislative Strategy
- Innovations and Improvements in Member Board Certification Programs

- Singapore Contract Renewal
- Research and Scholarship
- Continuing Certification Innovation

- Organizational Growth and Development
- High Performing Organization
- Organizational Improvements

- Governance
- CEO Transition

High Bar Consulting
Strategic Planning Framework – *Strategic Initiatives*

**Strategic Plan:**

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**Operating Plan:**

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What are Strategic Initiatives?

Strategic Initiatives:

- The ventures and undertakings that make up the work of the Strategic Priorities
- “The how” – they do not have to be visionary
- Multiple Strategic Initiatives typically are required to achieve a Strategic Priority
- A Strategic Initiative can be a category of programs or projects, but is not a single project.
- Have a defined time horizon, typically the same horizon as the Strategic Priorities. Sometimes Strategic Initiatives become more clear over time calling for a Strategic Plan to be updated regularly
Examples *Strategic Initiatives*

Museum of Science and Industry

*Strategic Initiative 1: Design and implement science teacher training program*

Chicago Architecture Foundation

*Strategic Initiative 1: Organize neighborhood build environment coalitions*

ABMS Initiatives (aka Tactics)

*Strategic Initiative: Develop and implement an integrated multi-channel marketing and communication strategy that promotes the value of ABMS Member Board certification to the public, diplomates, and other stakeholders. This strategy will align and integrate the engagement and legislative strategic plans.*
ABMS 2018 **Strategic Initiatives (aka Tactics)**

- National Thought Leader
- Global Impact
- Expanded Influence
- Innovative Assessment
- High Performing Organization
- Organizational Growth and Development

- Communication Strategy
- External Engagement and Legislative Strategy
- Singapore Contract Renewal
- Innovations and Improvements in Member Board Certification Programs
- REF Research Strategy
- Future Vision for Certification
- CertLink™
- Organizational Improvements
- Governance
- CEO Transition
# ABMS Initiatives (aka Tactics)

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Identifying your \textit{Strategic Initiatives}

Working in an expanded planning group that includes functional leaders of your organization:

1. For each Strategic Priority and utilizing the data from your S.W.O.T, identify the 4-6 major work efforts. These often resemble a chronological flow.

2. Clarify your Strategic Initiatives
   - Description - Develop a 50ish word description for each Strategic Initiative
   - Criticality - Articulate why this initiative is critical to achieving the Strategic Priority
   - Outcomes – Identify the anticipated outcomes and measures of success of each Initiative
What are **Tactics**?

**Tactics**
- are the organization-wide activities that contribute to achieving a Strategic Initiative
- Tactical plans include:
  - Responsibilities
  - Timing
  - Dependencies
  - Costs
  - Resource requirements
- have a defined time horizon based on the time horizon of the Strategic Initiative?
Identifying your **Tactics**

Working with subject matter experts:

1. For each Strategic Initiative and utilizing the data from your S.W.O.T, identify the 4-6 Tactics that will be required to achieve the Initiative. This is typically at the project level.
   - Description - Develop a 50ish word description for each Tactic
   - Criticality - Articulate how each tactic will contribute to the Strategic Initiative
   - Outcomes – Identify the anticipated outcomes and measures of success of each Tactic
   - Detailed plan:
     - Responsibilities
     - Timing
     - Dependencies
     - Costs
     - Resource requirements

2. Tactics may shift as the landscape of the Strategic Priorities and Strategic Initiatives becomes more clear.
### INNOVATIVE ASSESSMENT

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**Action Steps and Initiatives**

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### ABMS Outcomes/Metrics

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<td>• Increase the number of consumer Board Certification national and local articles and interviews resulting in media placements increasing by 30% by the end of 2018.</td>
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<td>• Develop 10 consumer and professional Continuing Certification distributed testimonials by the end of 2018.</td>
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<td>• Increase social media audience and traffic across platforms by 30% by the end of 2018.</td>
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MARKETING AND COMMUNICATIONS: ACTIVITY

Total Inquiries = 51
Total Interviews = 11
Total Statements = 26
Total Press Releases = 24
MARKETING AND COMMUNICATIONS: WEBSITES

2017 Aggregate Total = 653,650
2016 Q2 Total = 300,430
2017 Q2 Total = 324,907
YOY Q2 +8.15%
MARKETING AND COMMUNICATIONS: SOCIAL MEDIA

Social Media Metrics Jan 2016 to June 2017

Total 3,896 3,916 3,968 4,031 4,099 4,154 4,191 4,253 4,307 4,373 4,415 4,446 4,513 4,562 4,618 4,659 4,700 4,753

2017 Aggregate Total = 27,805
2016 Q2 Total = 12,284
2017 Q2 Total = 14,112
YOY Q2 +14.88%
Strategic Planning Framework – *Departmental Objectives*

**Strategic Plan:**
- Mission
- Vision
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  - Tactics ~ 4-6

**Operating Plan:**
- Departmental Objectives
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What are *Departmental Objectives*?

**Departmental Objectives**

- are typically “owned” by departments or functions within the organization
- The Department Objectives are the specific department’s role in contributing to the Tactics
- Department Objectives help to clarify the roles and responsibilities in the Strategic and Operational Plan
- High Performing organizations engage Department heads in identifying the roles and responsibilities of their teams
- Typically have a time horizon of one year and are part of an annual plan
- Feeds into the Performance Management cycle
Strategic Planning Framework – *Individual Goals and Objectives*

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What are *Individual Goals and Objectives*?

Individual Goals and Objectives

- define roles and responsibility for completing the Plan.
- High performing organizations engage employees, often as part of department working sessions, in determining individual roles and responsibilities for achieving the plan. These responsibilities form the basis of each individual’s Goals and Objectives.
- Typically have a time horizon of one year.
- Form the core components of the Performance Management cycle.
Who to involve... *and when*

- All Employees
- Management and Key Subject-matter Experts
- Board and Senior Leadership

**Mission**
**Vision**
**Strategic Priorities**

**Strategic initiatives**

**Tactics**
- Departmental Plans
- Individual Goals and Objectives
Tips and Lessons Learned

1. Strategic Planning is not for the faint of heart
   It takes patience, perseverance, and brain power to navigate the messiness

2. A Strategic Plan that sits on the shelf may be worse than no Strategic Plan at all
   Before you start, make sure you have the capacity to keep it alive

3. Bite off what you can chew
   Organizations only have the capacity to work on 4-5 Strategic Priorities at one time

4. It takes both sides of your brain
   It’s not enough to have a great analysis. To build a compelling plan, create a positive, high energy creative and rigorous atmosphere for building the plan

5. Create spaciousness
   Leave sufficient time between planning sessions to sort through and clarify the components of the plan

6. Periodically evaluate
   Regularly review and refine the plan regularly…. at least annually