

BUILDING AN ANNUAL STRATEGIC PLAN

Mike Trier

Kurt Wankier

Mike Trier – No Financial Interest

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- ▶ Director of Assil Eye Institute and 90210 Surgery Medical Center in Beverly Hills, CA



sharano optical

PASC

FINANCIAL DISCLOSURE

Kurt Wankier – I have Financial Interest

- ▶ President, Envision Management & Marketing, LLC
- ▶ President of iSee by Envision Metrics, LLC





FINANCIAL DISCLOSURE

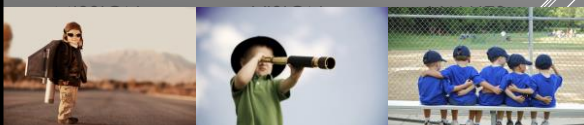


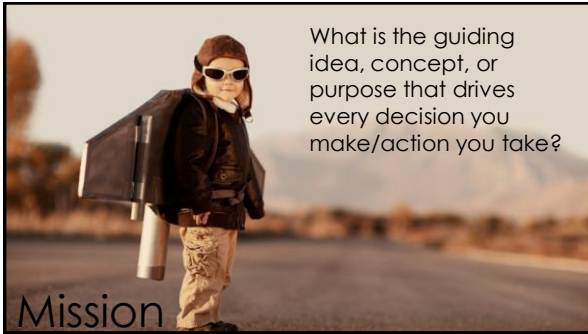
How Many of Us Work in an Environment with this Approach to Decision Making???

Building a Road Map to Success



STEP #1: BEGIN WITH YOUR FOUNDATIONS





What is the guiding idea, concept, or purpose that drives every decision you make/action you take?

Mission



HORIZON EYE SPECIALISTS & LASIK CENTER



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

Mission



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

Mission



Vision

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



THE VISION TO SEE... THE POWER TO CHANGE



Vision

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



HORIZON EYE SPECIALISTS & LASIK CENTER



Vision

Horizon Eye Specialists & LASIK Center Provides Eye Care Like No Other.

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



Values Provides guidance as to the character we plan to utilize as we achieve now and in the future



Values If money didn't matter, if acclaim was irrelevant, if competition was non-existent, how would your organization be described?




HORIZON EYE SPECIALISTS & LASIK CENTER

Values

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.




HORIZON EYE SPECIALISTS & LASIK CENTER

Values

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.



HORIZON EYE SPECIALISTS & LASIK CENTER

Values

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)?



VALUES QUESTIONNAIRE

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?



Template

YOUR LOGO

Mission
One to two sentence statement of the mission of your practice or department.

Vision
One sentence on your destination.

Values

Value #1
Statement of how value applies to your practice or department.

Value #2
Statement of how value applies to your practice or department.

Value #3
Statement of how value applies to your practice or department.

Value #4
Statement of how value applies to your practice or department.

Value #5
Statement of how value applies to your practice or department.

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

STEP #2: SET THIS YEAR'S STRATEGIC GOALS

- ▶ 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

DO YOUR HOMEWORK





Template

YOUR LOGO

Strategic Goals

Goal #1: Defined, realistic goal that has a target measurement whenever possible.

Goal #2: These goals could be revenue, surgery or visit growth. This includes new services or new doctors.

Goal #3: They could also be process gains in patient flow, surgery flow, or department processes.

Goal #4: They could also be big-picture targets towards staff development, culture building, or patient satisfaction.

Goal #5: There are no limits to the direction of the goals, because they could also involve new locations, new equipment, mergers, or other specifics.

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STEP #3: ESTABLISH ACTION ITEMS FOR EACH GOAL

Examples of Action Items

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 and Barb
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 and Mike Trier
Due Date: 1st Quarter 2011



Examples of Action Items

2009: Goal #1: HESLC Will Grow 20%
Begin Ophthalmology Hours in Goodyear at West Valley Vision

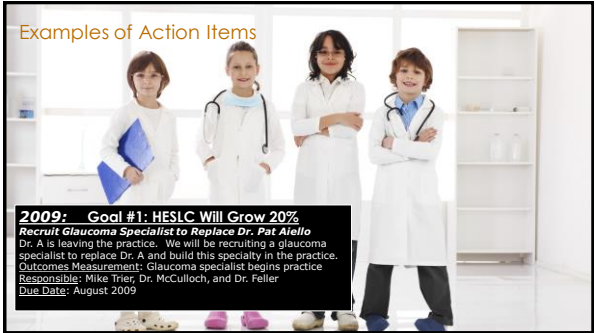
Dr. McCulloch will begin seeing patients bi-weekly at West Valley Vision, to begin a Goodyear presence for the practice.
Outcomes Measurement: Clinics start at West Valley Vision
Responsible: Dr. Robert McCulloch
Due Date: February 2009



Examples of Action Items

2009: Goal #1: HESLC Will Grow 20%

Recruit Glaucoma Specialist to Replace Dr. Pat Aiello
 Dr. A is leaving the practice. We will be recruiting a glaucoma specialist to replace Dr. A 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



Examples of Action Items

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



Examples of Action Items

2014: Proactively Keep Allied Way Office First Class in Appearance

In March, we will be six years into our use of the Allied Way office. We will look to have a thorough walk through of the office. From that walk through we will establish a check list of improvements and fixes needed to keep the office up to date and looking exceptional.
Outcomes Measurement: Plan completed and in place
Responsible: Joey and Mike Trier with input from Dr. McCulloch
Due Date: 1st Quarter 2014 and implemented on time throughout
Update: Remodel of Allied Way Office in Fall 2014



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 improved over the next six months

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

Examples of Action Items

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

▶ Word template available from Kurt
 ▶ Email him at kwankier@emmconsultants.com

EXAMPLE OF STRATEGIC PLAN

ADVICE ON BUILDING YOUR PLAN

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
- ▶ 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



