

## Departmental Strategic Plans and Retreats: Are They Important Or A Waste of Time?

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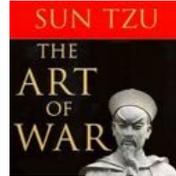


No financial disclosures



## What is Strategic Planning?

- The word strategy comes from the Greek στρατηγία (strategos), which means “art of the general”



“Every battle is won before it is fought”

“The dark side clouds everything. Impossible to see the future is.”

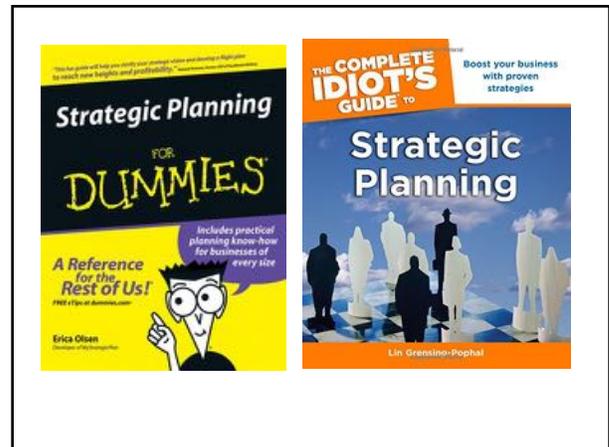
## Are Strategic Plans of Value?

- Strategic planning is the most widely used management tool among businesses
  - Higher utilization in high performing organizations
- CEOs spend 50-90% of their time in strategic planning



## Value of Strategic Planning

- “By failing to prepare, you are preparing to fail.” — Benjamin Franklin
- “If you don't know where you are going, you'll end up someplace else.” — Yogi Berra
- In preparing for battle I have always found that plans are useless, but planning is indispensable.” — Dwight D. Eisenhower



## What Is A Strategic Plan?

- Roadmap to get from an initial state to a goal state effectively and efficiently
  - Where are we now, where are we going, how will we get there?



## Value of an Anesthesia Plan

- Where are we now?
  - Preoperative assessment
- Where are we going?
  - Patient outcome
- How will we get there?
  - Anesthetic goals (hemodynamic stability)
  - Action plans (regional block)
  - Metrics (urine output)
- Response to dynamic changes



## Why the Controversy?

- Bad plans
  - 60% of organizations do not link strategy to budgeting
- Bad execution
  - 90% of organizations fail to execute their strategies
  - 95% of workforce does not understand the organization's strategy

Balanced Scorecard Collaborative



## Why Strategic Plans Fail

- Lack of ownership of the plan
- Lack of communication
- Not viewed as relevant to daily operations
- Viewed as an annual event
- Created without an implementation plan
- No clear, realistic goals
- No action plans
- Metrics not followed
- Employees not empowered



## Why Create Strategic Plans?

- Reflect your values
- Inspire change
- Define the culture for achieving success
- Assist in daily decision making
- Strategic planning as a learning process



## Elements of a Strategic Plan

- Mission and vision statement
- Long-term goals and objectives
- Strategies to achieve these goals
- Action plan to implement the strategies
- Strategic plan must be dynamic and change when conditions change

### Steps in Strategic Planning

- Assess current state (SWOT analysis)
- Design strategic plan
  - Mission, vision, values, strategy
- Build out the plan
  - Specific objectives, goals, and metrics
- Execute the plan



### SWOT Analysis

	Strengths	Weaknesses
Opportunities	Use strengths to take advantage of opportunities	Overcome weaknesses by taking advantage of opportunities
Threats	Use strengths to avoid threats	Minimize weaknesses and avoid threats



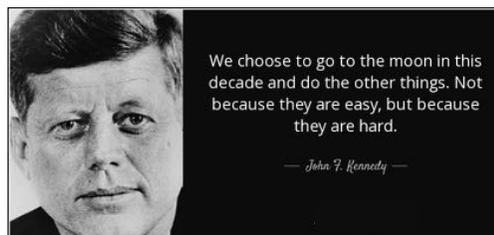
### Mission, Vision, and Values

- Mission: Why you are doing what you are doing
- Vision: Where you are trying to go
- Values: How you are going to get there



### Vision

- Your future state (big hairy audacious goals)
  - JFK: Put a man on the moon within a decade



### Mission and Vision Statements

- Facebook
  - Mission: “to give people the power to share and make the world more open and connected.”
  - Vision: “People use Facebook to stay connected with friends and family, to discover what’s going on in the world, and to share and express what matters to them.”
- Burger King
  - Mission: “offer reasonably priced quality food, served quickly, in attractive, clean surroundings.”
  - Vision: “to be the most profitable QSR business, through a strong franchise system and great people, serving the best burgers in the world.”
- Walmart
  - Mission: “Saving people money so they can live better.”
  - Vision: “To be the best retailer in the hearts and minds of consumers and employees.”

### University of Wisconsin School of Medicine

- Mission
  - Advancing health without compromise through service, scholarship, science, and social responsibility.
- Vision
  - Working together, UW Health will be a national leader in health care, advancing the well-being of the people of Wisconsin and beyond.
- Values
  - Integrity
  - Compassion
  - Accountability
  - Respect
  - Excellence
  - Diversity



## Elements of a Strategic Plan

- Mission statement
  - What is our purpose? Why do we exist? Should unify the department.
- Vision statement
  - What do we want to be or achieve?
- Values (principles)
  - What do we believe? What are we not willing to compromise?
- SWOT analysis
  - Internal strengths and weakness
  - External opportunities and threats
- Plan
  - Long-term strategic objectives (3-5 years)
  - Short-term goals (1 year)
    - SMART: specific, measurable, attainable, responsible person, time specific
  - Action plans (90 days) for each goal
  - Metrics (key performance indicators)

## Elements for Success

- People
- Resources
- Structure
- Culture
- Systems to assess success



## Ten Keys to Successful Strategic Planning

- A clear and comprehensive grasp of external opportunities and challenges
- A realistic and comprehensive assessment of the organization's strengths and limitations
- An inclusive approach
- An empowered planning committee
- Involvement of senior leadership
- Sharing of responsibility by board and staff members
- Learning from best practices
- Clear priorities and an implementation plan
- Patience
- A commitment to change

[http://www.tccgrp.com/pdfs/per\\_brief\\_tenkeys.pdf](http://www.tccgrp.com/pdfs/per_brief_tenkeys.pdf)

## Are Retreats Of Value?

- Retreats are powerful when they bring the right people together at the right time for the right reasons with the right process. Retreats allow us to step away from our daily responsibilities and see each other, our assumptions and our work with a wider lens and a different perspective. Retreats can enable us to access different parts of our hearts and minds, create new curiosity, generate momentum and good will, and move our work forward in powerful ways.

[https://www.just-works.com/img/Retreats\\_Ora\\_Grotsky\\_and\\_Jeremy\\_Phillips.pdf](https://www.just-works.com/img/Retreats_Ora_Grotsky_and_Jeremy_Phillips.pdf)

## Ineffective Retreats

- Too broad
- Too narrow
- No clear purpose (annual ritual)
- Leader (chair) is not involved
- One-off events
- Avoid addressing tough issues



“an act or process of withdrawing especially from what is difficult, dangerous, or disagreeable”

“a place of privacy or safety”

## Ways Retreat Can Add Value

- Make important decisions
- Create a major plan
- Build community and teamwork
- Provide training
- Resolve conflict
- Extra time to solve issues
- Share information and get feedback
- Create strategic plan
- Think deep thoughts
- Out of the box thinking



### Retreats That Add Value

- Identify the intended outcome before setting the agenda
- Review progress on plans from last retreat
- Allow time for both long-term and short-term action planning
- Allow time for collegial interaction
- Effective meeting leadership/facilitator
- Identify next steps and accountability

[http://www.integralstrategy.com/PDF\\_articles/ArtHaines\\_PlanningRetreats.pdf](http://www.integralstrategy.com/PDF_articles/ArtHaines_PlanningRetreats.pdf)

### Strategic Planning and Retreats

- Need to be free of the daily workload to plan



### Summary

- Departmental strategic planning and retreats are valuable for success

