

## Section #1 Transcript

### Section #1: The Importance of Strategic Planning

Welcome to Section #1 of the TenEleven Learning Course, Reports Don't Improve Outcomes. This section is all about strategic planning. Before we can talk about using data, reports, and, ultimately, the Data-to-Wisdom Continuum to improve outcomes, we need to explore strategic planning.

Strategic planning is the vehicle that your agency will use to ensure you are capturing the right data, running the right reports, making positive improvements, and also, it's how you'll know if you are getting a return on the money you're investing in your business operations.

In this section, we will examine three critical components to strategic planning:

1. Goal Setting
2. Technology Enablement
3. People and Process

Executing on these three areas will give your organization the foundation you need to run the Data-to-Wisdom Continuum, and create an agency culture of constant improvement.

### Lesson #1: Big, Hairy, and Audacious Goals

Welcome to Lesson #1 – Goal Setting. While fairly simple, it's often forgotten that you need a road map of where you are going in order to get to your destination.

A lot of words get thrown around when talking about goal setting: tactics, strategies, goals, sub-goals, action items, and the list goes on. Before we talk about how to set goals, let's talk about exactly what goes into a goal. There are four components: goal, strategy, objective, and tactic.

**Goal:** the broad primary outcome you wish to achieve

**Strategy:** the approach taken to achieve a goal

**Objective:** a measurable step taken to support your strategy

**Tactic:** a tool used to pursue an objective connected to a strategy

These terms are important as we'll refer back to these terms when describing the goal-setting process.

Now let's get started and take a look at some of the questions you should ask about your agency during strategic planning, and how those questions relate to goal and sub-goal setting.

In order to frame your strategic planning, you should be thinking about the next three to five years. I give a range of three to five because it depends on how far ahead you and your agency want to think. I prefer three years because of how fast things change in the behavioral health industry, but that's up to you. So, you want to ask of your organization, within the next three to five years:

- What problems is your organization trying to solve?
- What will your organization look like in three to five years?
- What impact will your organization have made on the community?

I'll give you an example of how these questions can help to build a strategy.

So, after answering these questions, an Outpatient Mental Health clinic that wants to focus on improving clinical outcomes for their clients might create the following goal: *The organization will seek to increase the frequency that patients are seen, because they believe that more visits will increase treatment effectiveness and produce positive outcomes.*

The organization would have multiple ways to tackle this goal. Reducing no-show rates for existing clients might be one. Another might be to improve caseload management to allow for

greater flexibility in scheduling. These methods will lead to sub-goals and ultimately lead to take positive action.

Jim Collins and Jerry Porras published a book in 1994 titled *Built to Last: Successful Habits of Visionary Companies*, in which they introduced the notion of the “Big Hairy Audacious Goal” or the “Bee-HAG.” It’s a means to align multiple functions of an organization behind common objectives.

BHAG goals are stretch goals. But they should still be achievable in the physical world and they should align with your agency’s mission and service delivery space. For example, don’t set goals for a substance abuse treatment if you are a mental health clinic. It’s fairly simple.

Whatever your goals are, strategic planning should result in a strategic business plan. Write it down. Write your BHAGs down. Put your agency logo on it. Make it official. Psychologically it’s important for everyone in leadership to have something tangible to refer back to when making plans for the future.

You should seek to develop two to four BHAG goals for your organization that are clear, compelling, unifying, and measurable. Keep in mind the measure doesn’t necessarily have to be a large figure. But they should be targets that your whole agency can get behind and contribute towards.

[An example from Jim Collins’ blog](#) discusses the clarity of an objective that President John F. Kennedy set for the space program. He told the country that by the end of the 1960s, the United States would put a man on the moon.

He could have said his administration would boost the space program and leave it at that. But his clarity gave NASA a BHAG that the whole country could root for.

The goal number was *one*. Not a large number. It’s just *one* man. Where did he need to be? The moon. A clear objective, absolutely compelling, and easy to identify when it is achieved.

Let your BHAGs be your destination, and let your operating plans and sub-goals be the road map to get you there.

So that covers the importance of goal setting and reaching for the moon. In the next lesson, we will talk about how to break BHAGs down into sub-goals and the importance of technology in achieving and measuring them.

### Lesson #2: Business Drives, Technology Enables

Welcome to Lesson #2 of The Importance of Strategic Planning. Previously we covered the importance of setting goals, and creating those Big Hairy Audacious Goals that give you a direction to steer your organization.

In this lesson, we're going to talk about breaking those BHAG goals down into smaller bite-sized chunks and how technology can support your goals and objectives in our second lesson: Business Drives, Technology Enables.

In order to implement a strategic business plan, you need to break down the "how." Create an annual operating plan that indicates how you are going to achieve your strategic objectives. It must break down your strategic plan into bite sized chunks that can easily be absorbed by your organization. A lot of change can happen within an organization over a year, but these annual sub-goals need to stay consistent.

It's also important to show your victories along the way. Yearly, quarterly, monthly, and random celebrations are good for employee morale to celebrate the accomplishments you make as you head toward your BHAGs. While you are celebrating, make sure you also remind everyone what your goals are, and how the organization is united in achieving them.

So much of our operating plans incorporate technology for either process support, or data collection, or in many cases both. And that brings us to today's lesson: Business Drives & Technology Enables. Not the other way around.

What this means is that your organizational strategy needs to drive your technology investments. Invest in technology that supports your goals, and avoid the “Wow! That technology is cool!” temptation. You’re not implementing technology for technology’s sake. It’s a means to the end, and the end is achieving your goals.

Consider your organization’s internal technology strength. Everyone needs the right technology these days, but there are different ways to deliver it. Do you have an IT staff in house; should you outsource some components, but not others? These are questions that should be considered so that you don’t get stuck with technology you can’t service that will also slow you down and distract you from your mission.

Plan for regular technology refreshes. As technology advancements continue, you should expect that basic hardware and software upgrades will be necessary. Plan and budget for them. New computers. New operating systems. New servers if you host your own data. Don’t wait until your technology completely fails to replace it.

Many behavioral health delivery models are moving outside the office and into the community. Does your technology support home and community based services? Making service providers wait until they are back in the office to update client records is a perfect example of allowing technology to limit your business. Making it possible for them to deliver services and complete their documentation outside of the office is using technology to support your business.

That wraps up our lesson on using technology to support your strategic plan. Stay with us for Lesson #3, where we will evaluate the human element of the strategic plan, and the importance of getting 100% buy in from your people.

### Lesson #3: Change the People, or Change the People

Hi there, welcome to Lesson #3: Change the People or Change the People. In our previous lesson we discussed how technology plays a critical role in helping an organization achieve their

strategic plan. Today, we'll dive into the importance of getting your staff to buy into that strategic plan.

Once you've established your strategic plan, you need to make sure that everyone in your organization is on the train and headed to your strategic goals. Whatever transportation metaphor you want to use, now that you've established your destination, it's critically important to make sure that everyone is headed there with you and no one is left behind. This means that everyone is ready and willing to arrange a ride to the train station, change a flat tire, or wait for a layover in Atlanta. Because they understand that those adjustments are about reaching strategic objectives that the whole agency believes in.

When you evaluate your team, you want to make sure that you have reliable people who are willing to adapt to changing objectives. Your objectives for the next three years might not be the same objectives for the next two years after that. And in many cases, your strategic planning results in asking your team members to change. You want them to measure up to your organization's needs and expectations.

You have two options, either change the people, or change the people.

If you don't have players who are willing to change their behavior to help support the strategic plan, then they have self-opted out. It's ok for people to not to share your vision, but it's not ok to think that you will achieve your vision with help from people who don't share it.

The next step is to establish a communication plan so that all of your people are aware of the big hairy audacious goals (BHAGs), the strategic plan, the operating plans, and even the IT strategies. Part of this communication plan needs to ensure that you have purity of message among your leadership team.

When employees ask their supervisors questions about the organization's direction, those supervisors need to be able to answer them consistently. And if they can't answer them, you want to have a process in place for those questions to be answered accurately.

True or False? Peers can answer questions about the strategic plan if there's no supervisor.  
False! You don't want peer to peer answering of questions about the strategic plan because they didn't help prepare it. They may have the right answer, but they also may not, and it's important to ensure that you get 100% of questions about the company's established goals and objectives answered correctly.

It's the only way to be sure that you are able to keep all of your employees informed and united in achieving the organization's goals.

The next operational component to planning is understanding your processes. Don't sell this short. Don't think, "oh, I know that if this person goes here, and if this, then that, then I go take this paper to that person, and they review it before it gets sent upstairs for a final look, and then we're done." Phew (exhausted)

Slow down and create process flow diagrams for all of your functions that are simple and purely repeatable. Purely repeatable processes are going to enable you to collect clean data that is consistent across your organization. In the next section, when we walk through the Data-to-Wisdom Continuum, integrity of data is going to be important, and this is how you'll make sure you're getting it.

There is a complimentary tool for this because process flow diagrams also make excellent training tools for new employees. You can sit them down and use the visual to walk them through where they fit within the organization, and they can keep them for reference as they continue to acclimate to their new role and their new organization.

We mentioned in the previous section that Business Drives and Technology Enables. These process flow diagrams are the exact mapping that you want to have when you implement your technology. Does your current technology support your process? If it doesn't, you'll want to consider alternate solutions that will.

Now that we have reviewed the importance of strategic planning, in the next section we will talk about how this planning can be put to use, inside the framework of the Data-to-Wisdom Continuum. This will help to ensure that you have all the information at your fingertips to help advance the goals of your organization in positive, and constructive ways.