Strategic Planning for Medical Practices
Desired Outcomes from the Process

- Common understanding of where practice is today
- Cooperative view of “soft spots” and opportunities for improvement
- Consensus of where practice wants to be in the future
- Design of action plan
Practice Overview

- Financial
- Provider income
- Personnel
- Other
Observations about the Practice

- Positive points
- Negative points
Overview of Health Care Service Area

- Managed care
- Consolidation
- Who are the competitors?
- Trends
- What are the hospitals up to?
Review of Key Objectives & Critical Success Factors

- What makes practice unique
- What makes practice successful
- Shared vision of the doctor(s)
- Review key undertakings of past year
List Top Issues Now Facing The Practice

1. _____________________________
2. _____________________________
3. _____________________________
4. _____________________________
A detailed discussion should follow, including any obstacles that must be overcome to effectively address the issue.
Issue:

- How practice intends to address the issue
- Obstacles to overcome to ensure success
Develop Goals for Next Period

- Strategic undertakings
- Financial goals
- Other key efforts
Conclusion of the Process

- Summarize key successes/challenges
- Reiterate key goals
- Develop action plan
- Decide how to monitor action plan implementation