



Strategic Planning— Making it Work!

2004 served as the inaugural year for *The Journal of Oncology Management Strategic Planning* column. This column is designed as a practical guide to strategic planning for cancer program executives and practice administrators. This year's column focused on the fundamentals of strategic planning, from determining "Where are we?" through "Where do we want to go?" and ultimately to "How will we get there?" Now that you have the fundamentals in place, next year's column will be devoted to topics such as the practical applications of cancer program strategies and tactics; the role, design, and structure of service line management for cancer programs; hospital and physician integration; and cancer program executive skills requirements (building on a 2002 article in *The Journal*).

Adding to Your Toolbox: A Strategic Planning Checklist

As this year ends and you begin to prepare for the New Year, take a moment to assess the adequacy of your strategic plan. The following questions (see Table 1) will help you determine how prepared you are to start the New Year with peace of mind that your organization's strategic direction is adequate and in place:

Strategic Direction

- Does your program have a strategic plan that was developed or updated within the past 12 months?
- Does the program mission statement describe the role of the program in the community and differentiate the program from those of competitors?
- Is the program vision statement clear, measurable, and descriptive of the program's key future characteristics? Does it describe in detailed yet concise fashion what the program will look like in the future and is it supportive of fulfilling the mission?
- Have assumptions about the future environment and the cancer program's position in that setting

been updated and challenged? Are the strategies reflective of the issues facing the program and the challenges that the environment does and will provide?

- Have strategies been formulated that address which components of the program are targeted for growth and how such growth will occur?

Plan Implementation

- Is the plan supported by an implementation plan that specifies annual strategic plan targets and outcomes, responsibilities for plan implementation, identification of resource requirements, and expected (and measurable) outcomes?
- Is there an individual in the organization who is taking an active lead to implement the plan?
- Is the implementation plan reviewed annually by the cancer program and hospital leadership teams? Is progress on the plan reported to the board at least annually?
- Are the oncologist and surgeons active participants in the implementation of the plan and in reporting progress on the plan?
- Are there any facilities, technology, or capacity deficits? If so, is there a plan to address them in a timely manner?

Marketing and Building Referral Relationships

- Is there a marketing plan for the program that contains an aggressive set of strategies? Do these strategies differentiate the program in a significant and meaningful fashion?
- Do the strategies address strengthening referral relationships, direct consumer marketing, the role of the Internet in program marketing and promotion, and a stronger position in contracting?
- What role will networking relationships and potential affiliations have for the program's direction?

Table 1. Strategic planning program evaluation

Evaluation Criteria	Yes = 1, No = 0
Strategic direction	
1. Strategic plan less than 12 months old?	
2. Mission statement exists, differentiates the program?	
3. Vision statement articulates the future desired key program characteristics	
4. Future assumptions exist and have been challenged?	
5. Strategies for growth exist; address specific program areas?	
Plan implementation	
6. Implementation plan exists?	
7. An individual responsible for strategy implementation?	
8. Implementation plan reviewed and updated annually?	
9. Oncologists active participants in the planning?	
10. Facilities, technology, or capacity issues? Plan to correct?	
Marketing and building referral relationships	
11. Marketing plan exists, contains aggressive strategies, and differentiates the program?	
12. Strategies address strengthening referral relationships?	
13. Strategies for networking and affiliations?	
Organization, leadership, and financial planning	
14. Clear organizational structure and leadership strategy?	
15. Oncologists/hospital relationships strong and healthy?	
16. Plan addresses economic and political integration goals with oncologists?	
17. Five-year financial analysis prepared to assess the plan?	
18. Plan approved by hospital leadership?	
Total points*	
*18 indicates a perfect score (plan to update the plan this year); 15 to 17, strong score (some improvement is required); and 0 to 14, weak score (significant improvement is required).	

Organization, Leadership, and Financial Planning

- Is there a clear organizational structure and leadership strategy with defined responsibilities for the program?
- Are hospital and oncologist relationships strong and healthy? Is the trust and respect level between the parties strong?
- Does the strategic plan address the economic and political integration goals of the oncologists? Is the strategic plan complementary to the practice goals of the oncologists, and vice versa?

- Is the plan supported by a 5-year financial analysis that links the resource requirements and expected outcomes identified in the implementation plan?
- Has the program received hospital leadership approval for the resources requirements it needs to be successful in the future?

A score of 18 (100%) should leave you with peace of mind that your cancer program has a good foundation to start the New Year. Update the plan during the New Year and complete any midcourse corrections that are required.

A score of 15 to 17 ($\geq 80\%$) means that some work needs to be completed on your strategic plan. Enjoy the New Year and return to work to strengthen the plan.

A score of 14 or less ($< 80\%$) means a significant amount of work needs to be completed in the New Year. Enjoy the holiday celebration, but reserve your energy for the strategic planning work awaiting your return.

Best wishes for an enjoyable holiday season and Happy New Year!

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