

Overcoming the “Limiting Factor”

Aligning the right people with a sound
strategic plan to achieve clinic goals



November 13, 2017

VAFCC Annual Conference
Virginia Beach

©2017 Snowflake LLC. All rights reserved.

Overcoming the “Limiting Factor”

Aligning the right people with a
sound strategic plan to achieve clinic goals

2017 VAFCC Annual Conference
Virginia Beach, Virginia



Presenter

Tom Morley

President + Managing Director

Snowflake LLC

Certified B Corporation®

Acknowledgements

Thank you to VAFCC • Fauquier Free Clinic • Brock Hughes Medical Center • Lackey Clinic • Loudoun Free Clinic • Charlottesville Free Clinic

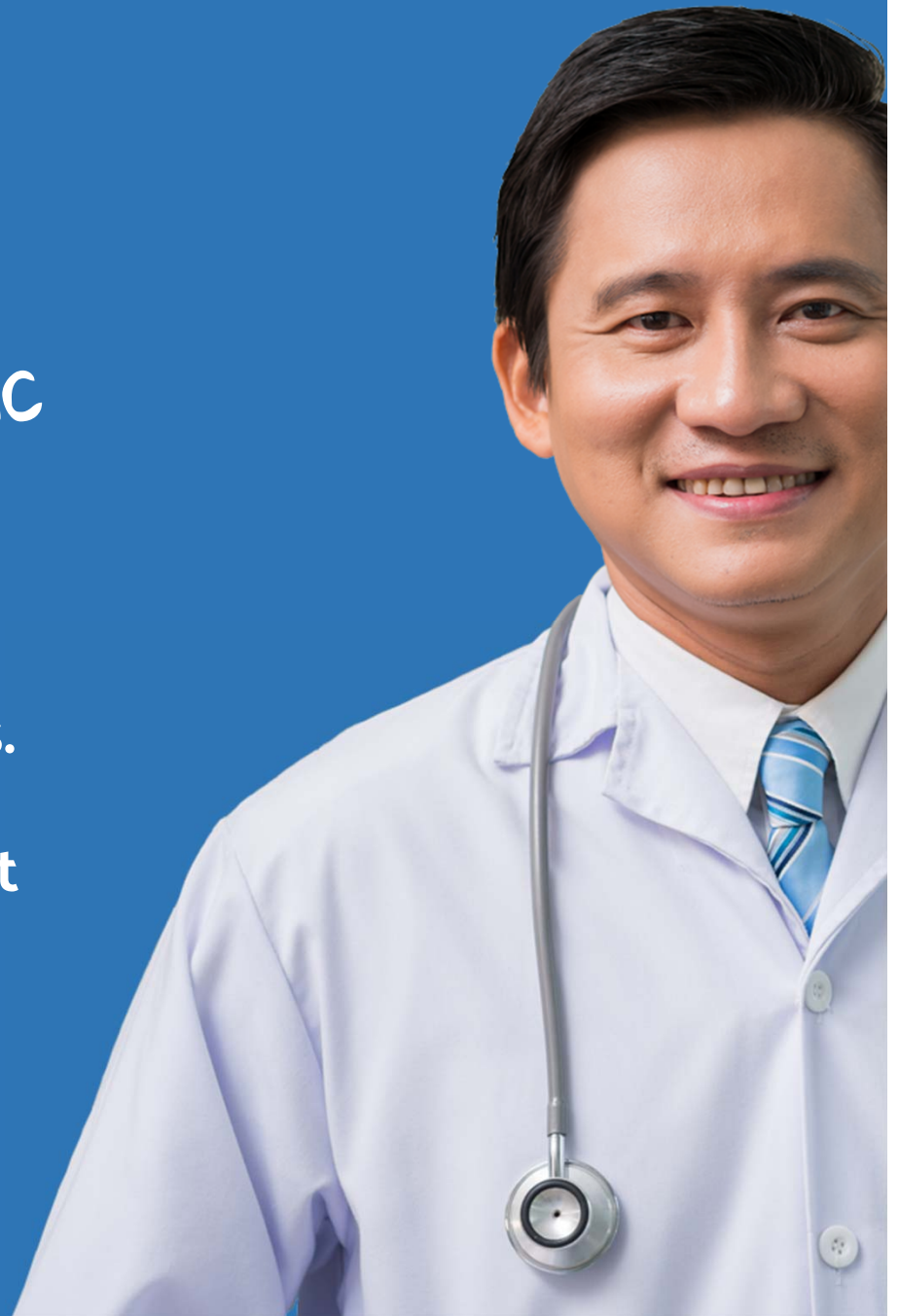
Developed with support from Logan Andrew & Associates

Challenge

Bring your strategic
plan to life!

**You've spent hours developing
goals, objectives, and strategies.**

**Who's going to do the work that
turns them into reality?**



Part One

Making Good Strategic Lifestyle Choices

Pulse Check

Let's start by seeing how you stack up against your peers

- **Do you think your clinic has a sound strategic plan?**
 - What about it makes you think it's particularly good?
 - How does it promote action that will lead to results?



Strategy Intake

Clinics may have strategic plans,
but not all of them are healthy

- **Many plans lack foresight**
 - Fail to think ahead
 - Don't see the “big picture”
- **Plans have to drive action**

“Textbook” plans are usually insufficient to support coordinated action. No matter how creative and well-defined, they won't deliver.



Key Symptoms

Plans that aren't effectively executed share many problems

- Common “missing links”
 - Inadequate resources
 - Insufficient action guidance
 - Lack of coordination
 - Inability to recognize issues
 - Failure to adjust course

Strategic plans often miss critical factors, from ensuring internal capacity to establishing adequate oversight and adaptation mechanisms.



Clinic Prognosis

When plans fail to get good outcomes, real lives are affected

- **Strategies don't get executed**
 - Targets not hit
 - Objectives missed
 - Other strategies impacted
 - Goals not achieved
- **The mission isn't advanced**
 - Potential unrealized
 - Needs unsatisfied

When you're not living strategically, there's a good chance the people who depend on you won't be getting the help they need.



Shifting Lifestyles

You want to “live strategically”

- Plan > Act > Measure > Adjust
- This means being:
 - Forward-thinking
 - Mission- and demand-driven
 - SMART with goals
 - Realistic and action-oriented
 - Prepared for changes
 - Well-coordinated
 - Continuous management



In strategic living, the “end game” isn’t just a strategic plan... it’s on-going, dynamic action that delivers the necessary outcomes.

Main Obstacle



"This is a major project of the utmost importance. It's a huge team effort and it's due in 15 minutes. Oh, and by the way, you're the team. Good luck with that."

Adapted from: Randy Glasbergen, www.rapidbi.com

Part Two

Resourcing for the Strategic Life

Dreaming Big

Even if they don't have plans,
every clinic has its dreams

- **What would you love to see happen at your clinic?**
 - What are your top five goals over the next three years?
 - Which of these goals are your clinic's highest priorities?



Getting in Shape

Transitioning to the strategic life requires some initial preparations

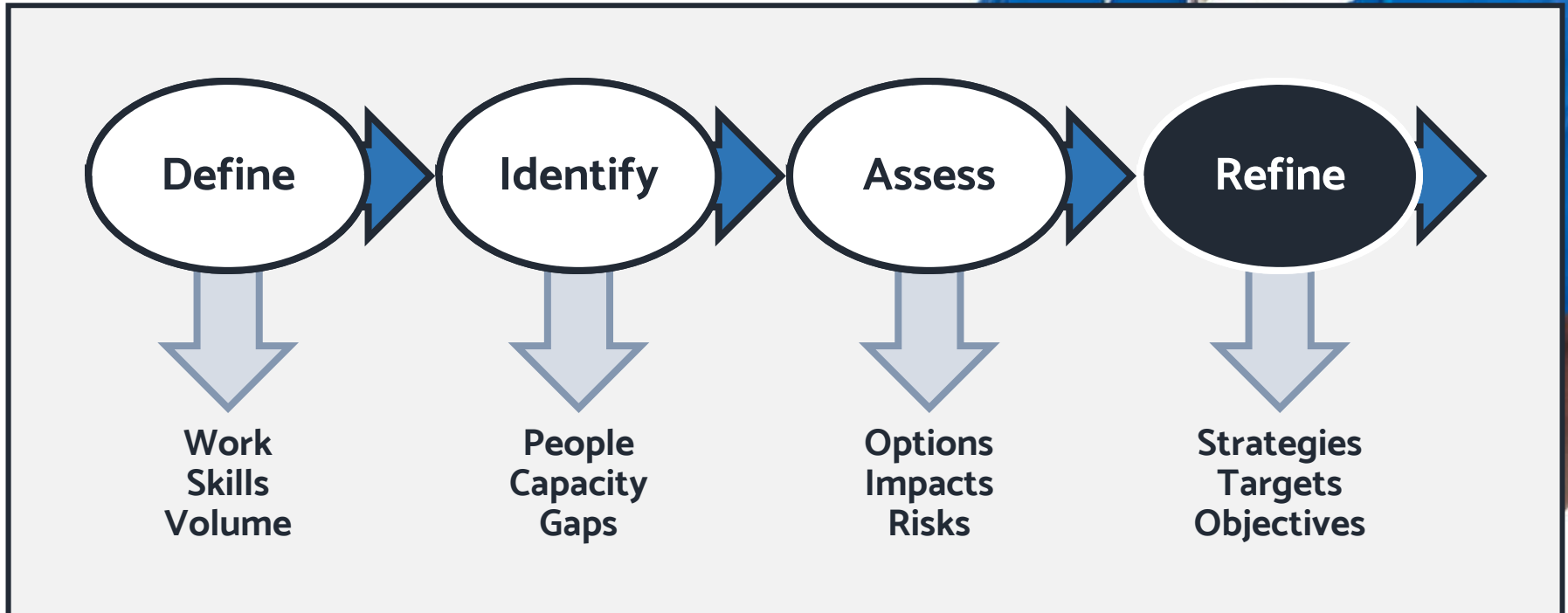
- **You need to:**
 - Get your priorities straight
 - Sequence your strategies
 - Schedule key milestones
- **This helps you to:**
 - Define resourcing needs
 - Assess options and impacts

If you know which goals and objectives are most important, you can make better decisions on how to apply limited resources.



Seeking Help

You need the right people working
to achieve realistic outcomes



Defining the Work

There's much to be done to achieve your strategic goals

- **What work is required?**
 - Plan management
 - Program design
 - Strategy implementation
- **When will it be done?**

The work that needs to be done to execute a strategic plan is in addition to the things that the clinic is already doing (and will continue to do).



Determining Needs

You should have a good idea of both knowledge and numbers

- **What skills are necessary?**
 - Management
 - Technical
 - Administrative
- **How many people are required?**
 - Estimates of FTEs
 - Volume vs. capacity

Having the “right” people to do the work—and enough of them—is critical to effectively executing strategies and achieving goals.



Identifying People

You'll want to see what you can do with the people you have

- **Are the right people there?**
- **Can they absorb the work?**
 - Current workload
 - Shifting responsibilities
 - Altering timelines
- **How should they be used?**
 - Strategic prioritization

You have to be careful not to overload staff, even if they have the right skills. Be realistic about what people can accomplish.



Gap Analysis

You need to compare who you have with who you need

- **What work can't be done?**
 - What skills are missing that need to be acquired?
 - Where do you need more people with certain skills?
- **Evaluate at each milestone**

The gap analysis tells you what you can't accomplish with your existing resources. You'll need to find a way to bring in additional help.



Bridging the Gaps

Some skills can cost a lot to bring on, but you may have options

- **How has your clinic acquired key resources on a limited budget?**
 - What creative ways you have tried to get the right skills?
 - What were the challenges? How did you handle them?



Gap Fill Strategies

You can consider many possible alternatives to fill resource gaps

- **Some alternatives include:**
 - Hire fully qualified talent
 - Hire down and develop
 - Develop in-house staff
 - Outsource for key skills
 - Use interns for specific tasks
 - Partner and share resources

Some strategies will be better for certain types of skill gaps than others, depending on degree of specialization, labor market accessibility, etc.



Evaluating Options

There are many things to think about to assess potential gap fills

- **Key evaluation factors**
 - Priority and timing
 - Cost to implement
 - Funding feasibility
 - Impacts of not filling
- **May create more needs, e.g.:**
 - Development staff
 - Marketing budget

Choosing the best gap fill actions—or deciding not to fill gaps at all—can be difficult, especially if your choices require raising more funds.



Decision Point

Resourcing decisions have major implications for the strategic plan

- **How will you approach staffing your strategic plan?**
 - What resource gaps will be your top priorities?
 - What resourcing strategies will you consider to fill gaps?



Part Three

Reconciling Your Strategic Plan

Revisiting Strategies

Un- or under-filled resource gaps
may affect strategy execution

- **Strategy implications**
 - May take longer
 - May not be able to do at all
 - Can affect other strategies
- **Upward effects**
 - Timing and content
 - Performance targets
 - Objectives and goals

If you don't have people to do the work, your plan needs to be revised to temper expectations and create something you can reasonably execute.



An Actionable Plan

Reconciling for resources gives you a plan your clinic can live

- **Requires constant monitoring to ensure you get:**
 - The resources you planned on
 - Timely, effective performance
- **Critical strategic discussions at the Board level must be regular**

There are risks you won't get the resources you anticipate. Recognition is critical so you can adjust course quickly and stay on track.



Final Note

Now you're on to
something!

You have a realistic plan, and
the resources to execute.

Execute, monitor, and adjust
continuously. Go live the dream!



Postscript

**Lessons to Take
Back to Your Clinic**

Application

The idea that strategic planning is a one-time discussion is a fantasy.

- Does resourcing a plan so you can live strategically seem daunting?
 - What can you take from this session and apply at your clinic?
 - What challenges do you think you will encounter?



Company Profile

About Snowflake

Our Story in Brief

- **Founded in 2014 by former “Big 4” consultants**
- **Certified B Corporation[®], Virginia SWaM and Micro-business**

Our mission

To help organizations that improve individuals' and communities' quality of life, making “top-tier,” global consulting perspectives, experiences, and professionalism accessible and affordable to non-profits, governments, and socially responsible businesses.

- **Key areas of expertise**
 - **Strategic planning**
 - **Market identification + engagement**
 - **People strategies**
 - **Cost-effective organizations**
- **We scale our services to client needs, abilities, and resources**

Thank You!





global perspectives :: community priorities

we help great organizations
do greater things

for the greater good



www.snowflakellc.com

twitter: @snowflakellc