Parallax LSC
POWER OF PERSPECTIVE

Strategic Planning – Why, How, Then What?

World Pancreatic Cancer Coalition Annual Meeting
May 9, 2018

About Parallax Life Sciences Consulting

Strategy & Solutions

We use a proven methodology, *the Power of Perspective*, to solve your most complex business and organizational challenges.

Customer Engagement & Meetings

We design unique experiences that bring customers, experts and influencers together to address complex health and policy issues.

Business Intelligence & Analytics

We go beyond data integration to deliver lasting analytical tools that help you uncover insights and take decisive action.

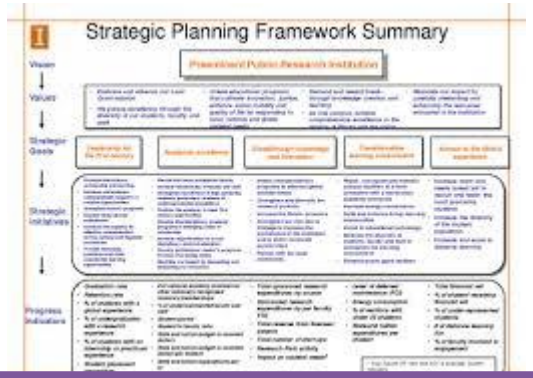
Topics

- Purpose of strategic planning
- Language of strategy
- Important things about setting strategy
  - Setting good objectives, the key to it all
  - Leveraging and adding capacity
  - Prioritizing priorities
- Thoughts on implementation and measurement

- Avoiding common mistakes
- Suggestions

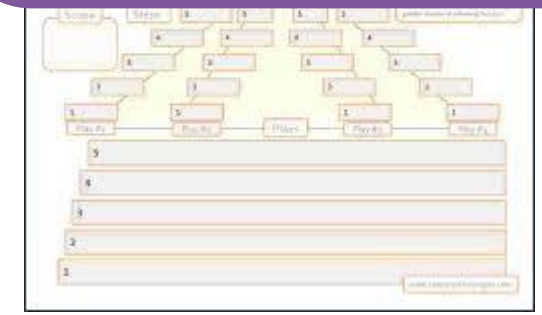
TEMPLATES

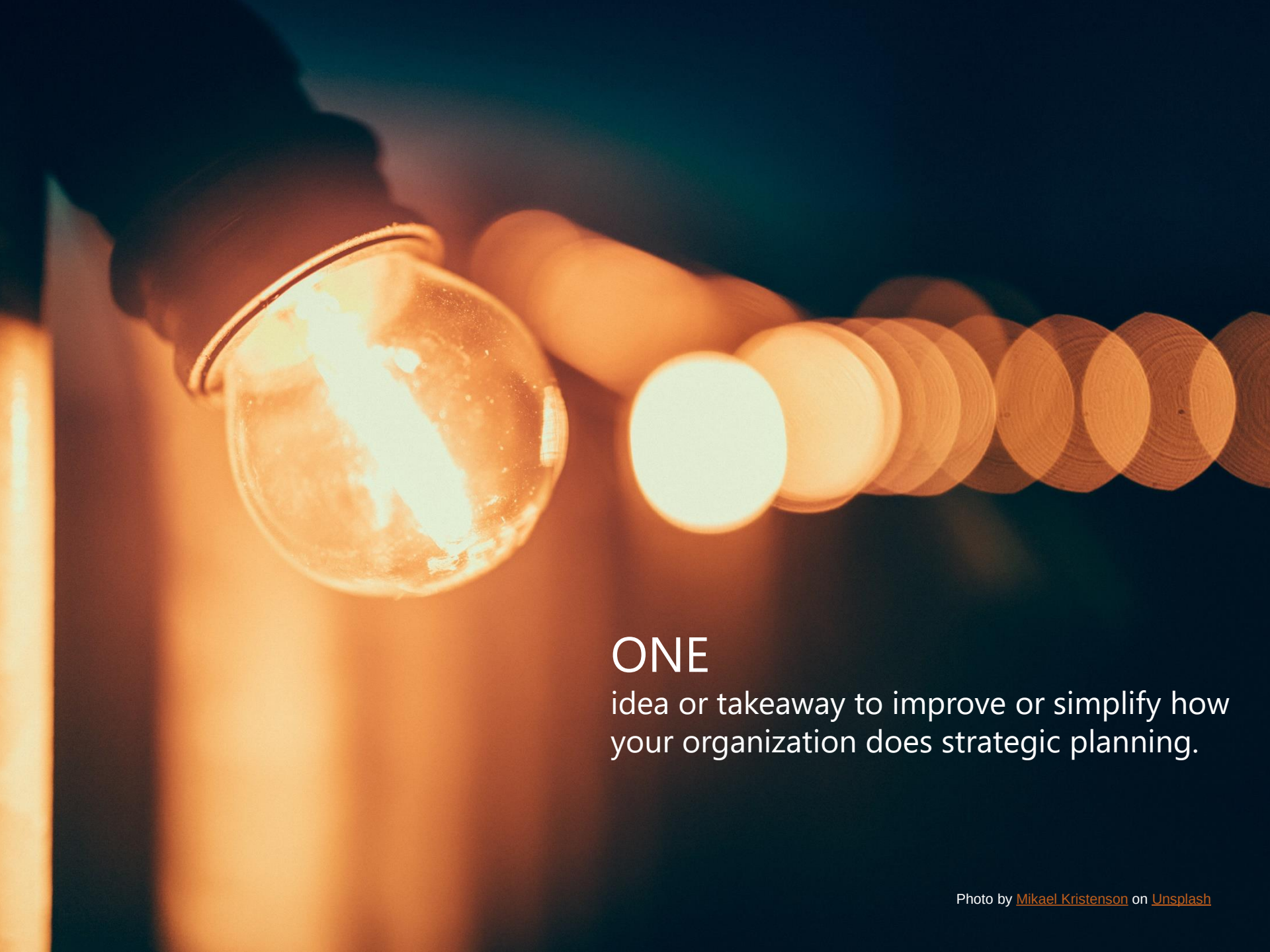
Results of Google search for: “easy to use strategic planning template”



People love templates…

…until they have to fill them out





ONE

idea or takeaway to improve or simplify how your organization does strategic planning.

Photo by Mikael Kristenson on Unsplash

WHY DO STRATEGIC PLANNING?

Common mistakes with strategic planning

1

More time spent on **Process** than **Interpretation & Debate**

Analysis, data, insights, filling in templates, etc. BUT

HAVE A **DISCUSSION** ABOUT:

What does the plan mean?

Why is it compelling?

What is the call to action?

What is the motivation?

Why strategic plans?

Strategic plans are not about getting it right

Strategic plans are about:

- Think about your business
- **Make a plan** (make decisions)
- Motivate the team
- **Follow the plan**
- Gain experience
- **Learn** and adapt

LANGUAGE OF STRATEGY

Common mistakes with strategic planning

2

Use too many words… and use them inconsistently

Language of strategy has become so convoluted…

…no one understands what anything means

MEANING is necessary for MOTIVATION

Seems straightforward, but terminology adds confusion, overlap, redundancy…

Simple terminology

Vision	States something great to be achieved in the future
Mission	What you do every day. Why you show up at 'the office.'
Strategy	Choices you make to deploy scarce resources in the best way to achieve specific objectives. Covers what you will do, what you will not do.
Priorities	Important things to focus on for your organization. A strategy often points out top priorities. **A Priority is not an Objective.**
Objectives	States **WHAT** you **want to accomplish**. Can have an Objective for each Priority.
Services Initiatives Programs	States actions for **HOW** you will achieve Objectives
Progress measures	Indicates if you are **on track** to achieve Objectives (includes activities done, milestones reached, "key performance indicators")
Results measures	Tells if the Objectives are achieved

A good example

pancreatic cancercanada

VISION

Improve overall patient survival rates and create a brighter future for those affected by pancreatic cancer.

MISSION

Pancreatic Cancer Canada is committed to improving pancreatic cancer survival by fostering research and creating hope through awareness, education and patient support.

STRATEGY PRIORITIES

Raising funds for research	*Awareness*	*Education*	*Advocacy*
Supporting research into detection, effective treatment options and ultimately, finding a cure	Raising awareness	Providing support and resources to patients and their families	Advocating for increased funding

OBJECTIVES

- Champion early detection research
- Educate and create awareness about pancreatic cancer
- Raise funds through various fundraisers and charitable donations to support leading edge research
- Partner with leading cancer centres nationwide and share the latest information and updates
- Share our knowledge and increase our effectiveness in Canada through our website and various mediums such as print and radio
- Increase our network of volunteers and donors nationally and set up affiliates throughout Canada

A good example

Pancreatic Cancer UK

VISION

Everyone with pancreatic cancer survives to live long and well.
By 2026, we want to transform the future for pancreatic cancer patients.

MISSION

We lead the fight against pancreatic cancer.

Why we exist: Pancreatic Cancer UK is fighting to make a difference. We're taking on pancreatic cancer together: by supporting those affected by the disease, investing in research, lobbying for greater recognition of pancreatic cancer, and being there for everyone involved in the fight. For too long this disease has been sidelined. We want to make sure that everyone touched by it gets the support and information they need. We're here for everything you need to know about pancreatic cancer.

STRATEGY

Our strategic objectives are a combination of **cause objectives** (alongside our partners and stakeholders, transforming the future for everyone with pancreatic cancer), and our own **delivery objectives**, which will allow us to be effective in our mission.

PRIORITIES

Research | Awareness | Education | Advocacy

OBJECTIVES

Strategic objective 1: Significantly grow our specialist support and information services for patients, families and friends.

Strategic objective 2: Drive up NHS standards and improve care

Strategic objective 3: Achieve a UK research investment position where game changing breakthroughs will lead to transformation. We believe that a minimum annual investment of 25million into pancreatic research will start to lead to transformation for patients.

Strategic objective 4: Deliver an enhanced programme of targeted campaigning to drive significant change in health policy and NHS practice.

Strategic objective 5: Aim to raise £10 million sustainable income year on year by 2022.

Strategic objective 6: Continue to be UK's leading specialist pancreatic cancer organization.

Take a look at their 3-year strategic plan: Taking It On Together

FRAMEWORKS FOR SETTING STRATEGY

Inputs to create strategic and tactical plans

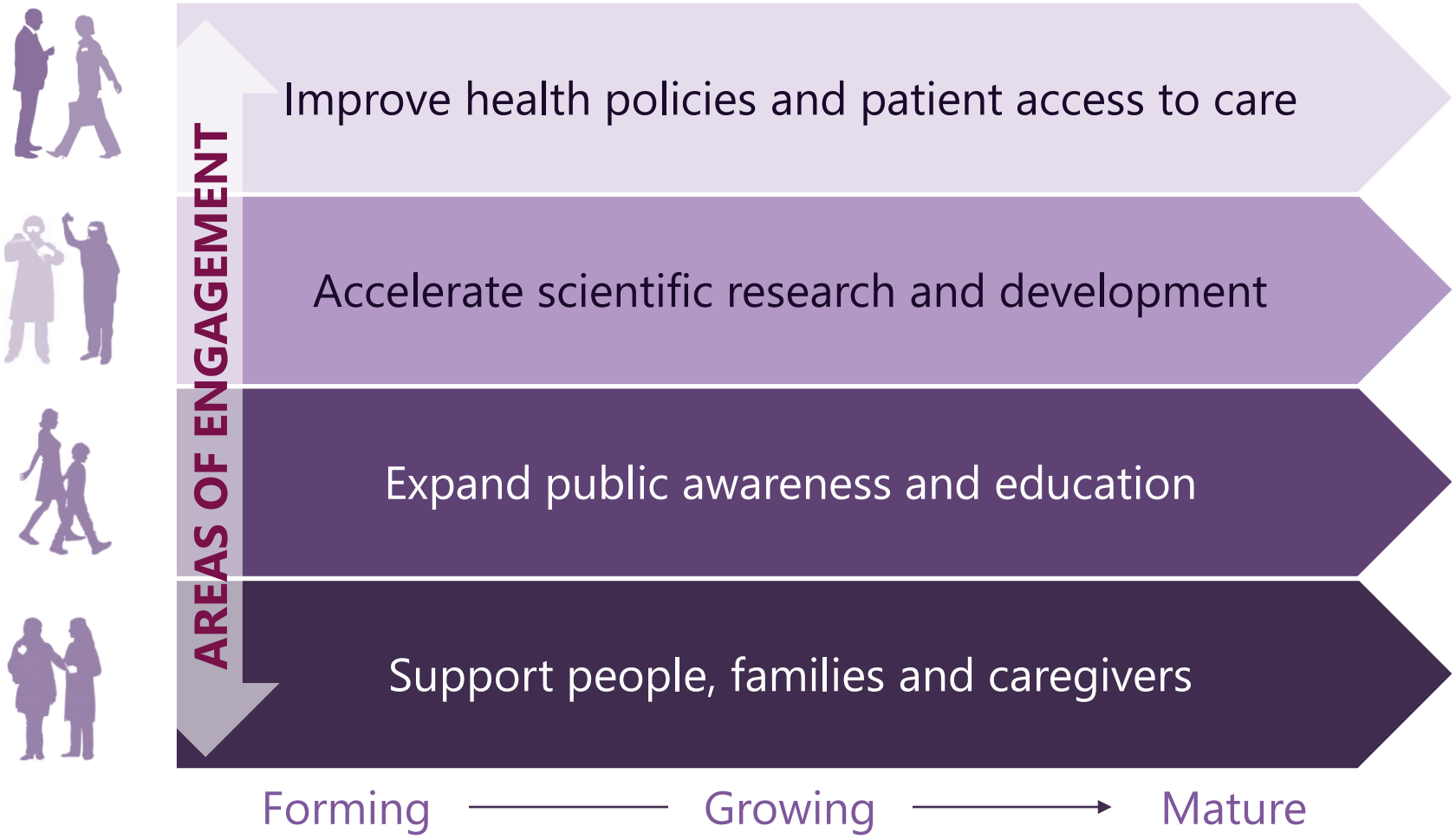
Could include some or all of the following:

Strategy	Tactics & Resources	Metrics
Landscape analysis	*Services*	*Baseline*
Customer research	*Initiatives*	*Progress*
Capability assessment	Customer targets	*Results*
Culture	*Messaging*	
SWOT	*Capacity / Resources*	
Priorities	Budget	
Objectives	*Prioritization*	

Covered throughout this discussion

Stages of engagement for advocacy organizations

Where are you today? Where do you want to be next year, and in 2-3 years?



Strategic planning framework: ask questions, starting with the end in mind

A — OBJECTIVES

- Who are our (most important) customers?
- What are the important problems to solve?
- Stages of engagement– today, in 2-3 years?

B — ACTIONS

- How do we leverage what we do best?
- Who else do we need to engage?
- What do we continue, add, stop?

C — CAPACITY

- What we do better than anyone else?
- What are most critical gaps to address?

D — PRIORITIZATION

- Can we / should we do (all of) this?
- Focused on people who need us most?
- Aligned with Mission?
- Right mix of Doing vs. Building?
- What will help make us sustainable?

TRY: Define a handful of core questions that form the basis of your strategic planning. Spend time as a team debating the answers.

Common mistakes with strategic planning

3

Not enough critical thinking on Objectives

Too much focus on what to do… …not enough clarity on what to accomplish

About objectives (and people)

A clear objective tells people <u>what to achieve</u>

A clear objective <u>empowers people</u> to figure out how to do it (the tactical plan)

Setting clear objectives is one of the most important roles for leaders

Setting concrete, clear objectives is hard to do

People often confuse…

Objectives (what to accomplish) *with* Actions (what they will do)

Something to achieve		Something to do
Patients believe they have the information they need to understand first diagnosis	Vs	*Develop educational resources for newly-diagnosed patients*

- Produce materials with information
- Find ways to deliver information
- Check if it serves customers' needs
- More concrete measure of success

- Produce materials with information
- Check to see if information is useful

TRY: Write Objective as a sentence, rather than a phrase that begins with a verb

ASK: Is the ***action*** the ***accomplishment***? If not, what do you want out of the action?

Common mistakes with strategic planning

4

Assume innovative ideas means new/creative ideas

Underestimate the possibilities of your own internal capabilities

Assess your capabilities

WHAT YOU ARE GOOD AT

ASK: Questions to understand what makes your capabilities unique.

→ Why did you create your offerings?

→ How did you do it?

→ What made it hard to do?

→ What did you learn along the way?

→ **WHAT unique know-how have you earned?**

Formula for innovative initiatives

WHAT YOU ARE GOOD AT + OPPORTUNITY or GAP + PARTNERS

- → Capabilities developed
- → Assets built
- → Curated content
- → Networks of relationships
- → Trust of experts…

Examples*: US Celgene Innovation Impact finalists 2016

WHAT YOU ARE GOOD AT

- Patient/family helplines
- Peer counselors
- Case manager expertise
- Comprehensive, qualified educational content
- Researched and found best local resources for patients
- Q&A for helpful information
- Culturally relevant information
- Information at right literacy level
- Resources to:
  - help people seek diagnosis
  - understand diagnosis
  - learn about treatment options
  - make treatment decision
  - manage treatment
  - live with condition

OPPORTUNITY or GAP

PARTNERS

Most finalists had a network of national or local partners:

- Community organizations
- Healthcare professionals
- Hospitals
- Health Departments
- Other advocacy organizations

*Compiled from coaching discussions with the top-10 finalist advocacy organizations in the 2016 US Celgene Innovation Impact Awards.

Common mistakes with strategic planning

5

Everything is important

*The **fear of leaving something off**…* *….trumps the **desire to focus***

TRY: When planning, trust initial instincts about prioritization. When pressed for time, people naturally focus on the most important things first.

WATCH-OUT: Given more time (i.e., looking at a plan the 2nd, 3rd, 4th time…) people naturally start to add things.

ASK: If adding priorities or objectives, is it more important than things already captured? If not, don't add. If yes, take something off.

Mature organizations tend to add (not delete) programs

For existing services / offerings / programs, think about:

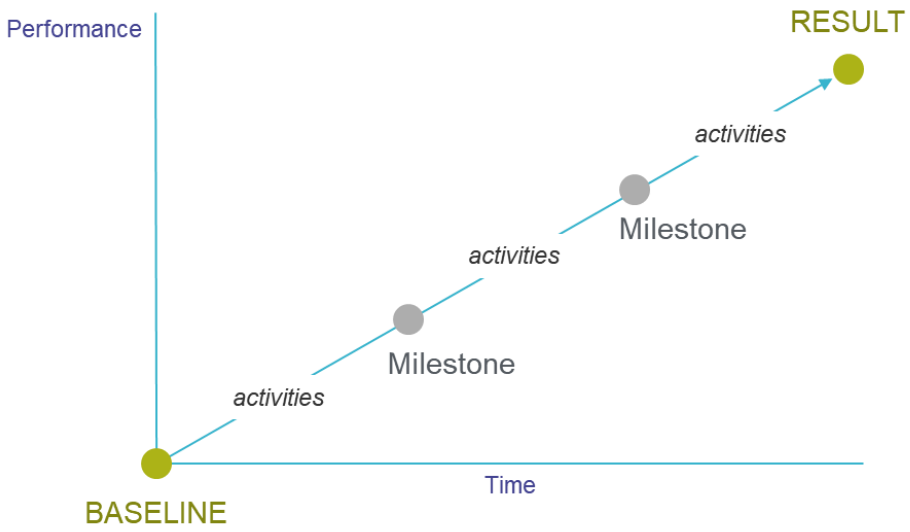
- How many people does this serve?
- Is demand growing or declining?
- How much funding revenue is associated with this?
- What does it really cost (money, people, time)?
- Is this DISTINCTIVE or a DISTRACTION?

IMPLEMENTATION AND MEASUREMENT

2 quick topics

- Measurement
- Where you spend your time

Measuring an initiative



	Measure	Question it answers*	Comment
	Baseline	• What is the current status (starting point, relative to the goal)	A baseline measure is essential to proving impact
Signs of Progress	Activities	• Are planned actions happening on time?	**Activities are easiest (but not the only) thing to measure**
	Milestones	• Do interim results indicate we are on track?	**Spend more time defining these measures!**
	Result	• Did we achieve desired output?	Be clear on the primary goal for the initiative

* A good measure will answer an important question

Framework: designing and measuring a health initiative

Milestones — GOAL

REACH → ENGAGE → CHANGE → OUTCOME

DESIGN APPROACHES TO ACHIEVE…

- Who are the right people to target?
- Can they be found (physically / virtually)?
- What channels will reach them most effectively?
- WHEN we reach them…

- Will they engage and participate?
- What will motivate participation / use?
- How will they know "what's in it for them?"
- WHEN they engage…

- What is the "call to action?"
- What will change?
  - Knowledge
  - Behavior
  - Action
  - Something else…
- WHEN they act…

What outcomes will improve?

- Clinical health
- Psychosocial
- Quality of life
- Patient satisfaction
- Quality score
- Provider efficiency…

METRICS TO SHOW

- Found / reached the target population

- Sufficient target population is actively engaged

- Change is underway
- Target audience is taking actions

- Improvement in some outcomes vs. baseline

Priorities shift and plans can change (sometimes)

- If you find you are spending much time on something *not in the strategic plan*, then ask:
  - Did we learn something? Is it a good thing to change the plan?
  - Is it a 'tray of food' or a 'plastic fork'?

<u>ASK</u>: Where are you spending your time, and what does it tell you?

✓ Effort spent aligns with the plan

✓ Effort spent says more important things have been discovered (change the plan)

⊘ Effort spent shows we are distracted

CLOSING THOUGHTS

Takeaways

MAKE A PLAN	Discuss, debate, and set clear objectives
FOLLOW A PLAN	Leverage hard-earned capabilities Find the right 'progress measures'
LEARN	Every now and then stop and assess: • Where you spend your time • What are you learning

APPENDIX

Additional reference materials

Tips for strategic planning

Strategic Planning Framework	TRY: Define a handful of core questions that form the basis of your strategic planning. Spend time as a team debating the answers.
Setting Priorities and Objectives	TRY: Write Objective as a sentence, rather than a phrase that begins with a verb ASK: Is the ***action*** the ***accomplishment***? If not, what do you want out of the action?
Assessing Capabilities	ASK: Questions to understand what makes your capabilities unique.
Maintaining Focus	TRY: When planning, trust initial instincts about prioritization. When pressed for time, people naturally focus on the most important things first. WATCH-OUT: Given more time (i.e., looking at a plan the 2nd, 3rd, 4th time…) people naturally start to add things. ASK: If adding priorities or objectives, is it more important than things already captured? If not, don't add. If yes, take something off.
Implementing and Changing	ASK: Where are you spending your time, and what does it tell you? ✓ Effort spent aligns with the plan ✓ Effort spent says more important things have been discovered (change the plan) ⊘ Effort spent shows we are distracted

Examples* from US Celgene Innovation Impact finalists 2016

APPROACHES to Reach, Engage, and Change for an Outcome

Milestones — GOAL

REACH → ENGAGE → CHANGE → OUTCOME

APPROACHES

- Social media and digital ad campaigns
- Schools – teachers, counselors
- Faith-based and cultural organizations
- Advocacy groups
- Focus groups – patients, caregivers, members
- Local public departments – education, health
- Local healthcare
  - Providers
  - Hospital systems
  - Clinics
  - Health department

- Go where they go:
  - Schools
  - Social clubs
  - After church programs
- Bring them to you – online, app, telephone
- Oppty to engage with others:
  - Experts
  - Peers
  - Respected leaders
- Test with focus groups
- Incentives
  - Make it cool (technology)
  - Make it super easy
  - Make it real (risk)
  - Competition (make more famous than Mona Lisa)

- Ask for follow up action
  - See your care provider
  - Pledge something
  - Sign up for program
  - Converse with family, provider
  - Seek support
  - Seek information
  - Connect with others
  - Express emotions

What outcomes will improve?

- Screen a risk
- Early(ier) diagnosis
- Get treatment
- Utilize local health care resources
- Become a volunteer

*Compiled from coaching discussions with the top-10 finalist advocacy organizations in the 2016 US Celgene Innovation Impact Awards.

Examples* from US Celgene Innovation Impact finalists 2016

METRICS for initiatives, events, and face-to-face interventions

Milestones | GOAL

REACH → ENGAGE → CHANGE → OUTCOME

- Target # patients / caregivers per geography, school, church…
- Target # providers per geography or setting
- Dissemination of materials, postcards
- # of partners doing outreach
- Target # of events or programs at location

- % reached who participate / interact
- Attendance per event or program
- Post-interaction survey on degree of learning, takeaway messages…
- # of views and shares of content / video

Pre- and post- survey

- Knowledge change (patient or provider)
- Feeling of empowerment
- Awareness of resources
- Intentions

Follow up actions

- Take a pledge
- Talk to family, provider
- Seek screening
- Use of resources - helpline, support group, programs
- Seek clinical trial
- Change clinical practice

Other

- Focus group feedback

Downstream follow up (3-mos, 6-mos…)

- Perceived improvement in QOL, emotional status, social support
- Patient satisfaction

Clinical changes

- Earlier diagnosis
- Treatment status
- Therapy adherence
- Involved in clinical trial
- Reports from partner provider organizations

*Compiled from coaching discussions with the top-10 finalist advocacy organizations in the 2016 US Celgene Innovation Impact Awards.

Examples* from US Celgene Innovation Impact finalists 2016

METRICS for media solutions – apps, websites, videos

Milestones | GOAL

REACH → ENGAGE → CHANGE → OUTCOME

REACH

- # of ad impressions
- # of clicks or page visits

ENGAGE

- # of downloads
- Info found / requested
- # that watch video
- # that take interactive quizzes or mini-lessons
- # that input health info
- # that invite others / share the app
- % target users who engage
- HIPAA compliant user tracking – aggregated demographics and disease data

CHANGE

- # that use resources (eg, helpline, peer, support group…)
- # report ↑ in knowledge
- # that identify risk levels
- # that identify others risk levels
- # seek screening
- # visit HCP

OUTCOME

- Treatment
- Medication adherence
- Surveys of QOL impact
- Patient satisfaction

*Compiled from coaching discussions with the top-10 finalist advocacy organizations in the 2016 US Celgene Innovation Impact Awards.