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Step 2: Plan - Use Business Intelligence to Build Your Strategic Plan

>> >> >> Thank you for joining today's webinar. “Step 2: Plan - Use Business Intelligence to Build Your Strategic Plan”. I'm Erica, Senior Director at the National Association of States United for Aging and Disabilities otherwise known as NASUAD. This webinar is presented by the business acumen center, part of the disability organization grants managed by NASUAD and made possible by the Administration on Community Living. Shortly after today's session, you will be able to find the PowerPoint, recording of this webinar , along with archives of all the disability webinars on the website. There will be time for questions and answers at the end of the presentation. Please enter your questions in the pot or at the bottom right-hand corner of the screen throughout the presentation. I am joined today by Donna Martin, Director for State Partnerships & Special Projects . Today will talk about module 2 of our business acumen toolkit. When we talk about business management and the roadmap, how easy is it? When we talk , we often hear business acumen, I have been in business for years and I do not need business acumen. This may be true and acumen may or may not be the right word, but what we have found over the past two and half years working with plans is things are not always what we want them to be. As they transition to long service our funding streams become tighter, CBOs increasingly need to look at their businesses in a new way. They need to look at how they are working, who they are working with and general operational limits. This is where the roadmap comes in. This resource is developed based on needs identified by organizations like yours, informed by state teams working together to address state Pacific challenges and opportunities and piloted by CBOs directly

working to sustain or grow their businesses. We understand that no two paths are identical and there's no one size fits all approach to what an organization must do in order to be successful. You may make progress and sometimes you are able to move quickly and other times you may need to slide back down to fix unresolved issues but the overall goal is to continue moving forward. The work our CBO has been doing highlights how organizations cannot just start moving without a plan. CBOs need to know where it is they want to go with their businesses in order to be successful. We also learned that while no paths are identical, there are still a number of overlapping issues that many CBOs face, the need to create a plant, to enhance efficiencies, develop partnerships, redesign operational processes, et cetera. To help with this, there are tried-and-true processes that can be used to help inform your decision, structure your goal, and develop your strategies. On one hand, we can keep pushing, keep moving forward to feel like we are making progress. But it doesn't help if we don't point in the right direction we want to go. We may be getting closer to Charlotte but is a Charlotte that we want? >> The facility network roadmap is available to help you create your path . Today we will focus on how to analyze and prioritize, and organize information to use for the plan. I want to give you a quick reminder about how the work came to be. The tools and resources we have available began with an environmental scan needs assessment survey and health plan on what business skills are important and how good CBOs are within those skills when it comes to working with managed care organizations or developing their businesses in general.

That survey helps to develop the structure for the toolkit which is further and currently is still being refined and defined by the collaborative . All of that information feeds into webinars, resources , and eventually a learning platform . The two learning collaboratives include business acumen which is a group of teams that have been working to address state Pacific specific objectives related to health care services and the business capacity of CBOs. The steps are prepare, plan, execute, and monitor and evaluate. Today, we will focus specifically on step 2, plan, which walks through the process of analyzing, prioritizing, organizing, and managing the information collected in step 1, prepare. This process is designed to help CBO developers make a strategic operational plan. In step one , we talked about this in past webinars, to review the first step, in adapting to change, prepare for the change for information gathering and analysis. Organizations that take the time to carefully review their vision and mission complete a thoughtful environmental scan and engage stakeholders in chapters will be prepared to develop and implement a strong strategic plan. Some highlights from lessons in the collaborative include needing to develop buy-in at all levels , starting with leadership at the very start of the process that must be consistently present and demonstrate commitment to the priorities of the organization and be able to link information together in order to help others understand the environment that their business works in. And eventually, it's how and why they will be using various strategies to sustain or grow their organization. Organizations need to be visible and stay informed during this data collection process, attend conferences, joint coalitions, introduce yourself and your organization to others. Doing so , commit to the effort in relationship building up and down the chain and don't be constrained by today. Think beyond any current constraint, regulations, and so forth that might create challenges today. Think beyond those things. The webinar for "prepare, understand your business place" can be found at the website. I will now hand it over to Donna who will speak in detail about step 2, plan.

Good afternoon, everyone. I am Donna Martin. I'm with ANCOR and I am going to walk through the elements of step 2, plan, with you. The elements of this module include analyze, looking at data , data driven decision-making, prioritize timing ,and return on investment, organize developing a strategic and operational plans, and manage navigating organizational change. The business development learning collaborative is following module 2 of the business acumen toolkit which will soon be released to the public. They have recently evaluated their

SWOT results and identified potential strategies to pursue and elevated the return on investment, and develop strategic and operational plans which they will implement over the summer. Some lessons learned by our collaborative include completing a thorough analysis before engaging with any new business partner including integrated care entities. That is essential. Partnering with other CBOs to build on strengths and shared resources is an option that many are considering. Leveraging your contacts to be on the lookout for nontraditional partners who can help with the effort, needing to develop a script and responding to people's assumptions about your services, defining your goals and detailed plans for reaching them including how to bring new initiatives to scale, building I.T. capabilities, data requirements, and building your business case to comply with payer requirements which are likely more robust than what is required with your current payers, and of course, using data to tell your story, what do you bring to the table that people want or need or that can demonstrate improved quality of life and efficient use of resources ? Where we have learned it is important to identify your initial key service model, it positions you above the competition. If you have been using step one, prepare, you began your work by creating a vision for your organization. You collected a significant amount of information about your internal and external environment. This can be an overwhelming amount of information which will take time to review and consolidate any useful way. To help you understand how your environment will help or hinder your ability to achieve your vision, review yours , specifically with your vision in mind. From here, you can brainstorm potential strategic goals and priorities and other strategies you can use to accomplish these goals. 21st two identifying your vision, as you consider the elements from your environmental scan and your SWOP, you may decide that you need to broaden or refine your original vision statement . In the toolkit, this is the first template recommended for you to walk through . These metrics include financial success, identify product or service quality, what are your contributions to the community, what are your most important product lines or services,

what is the right size for your organization, what you want your customers experience to be, what makes the experience unique , who are your customers, how will you find them, what are three noteworthy things your customers would say about your business, and how the community views you are and what industry experts say about your business. Here are a few examples taken from our learning collaborative. Please note here that this is an amalgam of comments that have been generated over time. This example is not reflective of a single entity. I want to just draw out a couple of examples . we look at the top line, product or service quality, the particular organization or the one reflected here saw their vision would be 100% customer satisfaction. And then when considering the results of their SWOP , they saw their strength is leadership having years of experience and a weakness was worker shortages which pretty much every CBO can relate to. They identified an opportunity as the demand growing for high-quality providers . They identified a threat as competition for people to serve. By way of example, if you look to the bottom row of the table, what was the vision for customer experience? They wanted to be welcoming and they wanted customers to feel welcome and be a part of their business with the customers in control of the services they receive. The strengths they identified relative to customer experience that managed care companies look at satisfaction scores which should be helpful to the organization . A weakness is that when people are dissatisfied, sometimes the organization can take too long to respond, communication lines not strong enough. An opportunity is they felt that they could expand services to current customers offering a higher level of service if that is needed. And finally, a threat they identified to the customer experience, instead of the organizations, they may have options that are more appealing to people. One dissatisfied customer has many entities to damage and organizations public reputation with review sites and social media. Studies site spent quite a bit of time really calling for the information and using it to inform their vision. Additionally, as a business, you not only want to realize your vision, but you want to be financially successful. To that point, you need to consider if there's anything that is not yet captured. That might positively or negatively impact your business that would provide your organization an advantage in the market for limited success or that would impact your organization's ability to address the opportunities or threats they find. With this information in hand, you are ready to identify the potential priorities of the organization. In the toolkit, we have a template that you can use to document your potential goals and strategies. With brainstorming potential priorities, consider the following questions. What does your organization want or need to accomplish in the next 1 to 3 years. For priorities, what areas of issues need to be addressed in order for your organization to be successful. What goals are strategies which the greatest return on investment for your organization? What is your resource utilization and how will you accomplish this work and what type or amount of staff we need or financial resources do you need and what methods will help to generate revenue?

[audio cutting in and out] to be successful. Next, consider what priorities begin to stand out. Here's another example that is found in step 2. We suggest that you identify your strategic priority based on your vision and what your SWOT informs you and then identify potential strategies to accomplish this. One example of a strategic priority would be to increase profitability of [indiscernible word] by 5% in the current year. Some potential strategies to accomplish that or to reduce staff expenses which is cost of materials or vendors, seek operational efficiencies or increase rates. Another strategic priority is to diversify payer sources over a three-year period. You could accomplish that by customizing programs, seeking partnerships, foundation engagements , other grants, increase marketing and increase contract staff. Expanding territory of a five-year period, potential strategies would be establishing strategic ships and, in the region, increasing marketing, considering licensure, what changes might you need to make as you expand the territory, the availability of staff, and space to rent. The second element in step 2 is to prioritize . And here, we look at what is your return on investment. We consider risk, admission, and organizational growth strategies. The return on investment is a measure of value of your investments against the cost of those investments to anticipate the impact of a potential strategy on your organization. You will want to look at the ROI that is it excited to eight. You want to analyze the financial cost and benefit of the initiative. When you use it, you make use of the money or is it the best use of your resources. It will result in a positive ROI. As a mission-based CBO , serving people with disabilities, you may find that there are some services are strategies that either [muffled audio] result in a loss. Sometimes this yields determination that a priority, sometimes the ROI and give the determination that a priority is not financially advantageous but it is so closely aligned with your organization's mission that you cannot afford not to do it. Let's look at some sample calculations.

Here is an example of an ROI calculation using our sample strategic priority. If you are projecting ROI for new initiatives, you will need to fully consider the cost associated with the initiative and have a realistic assumption about the expected profit or loss is based on the change and you must understand revenue streams relative to your expensive and overall profitability to drive information-based decisions. The table you see here is a sample table in step two and we will move to the next slide and really walk through the detail of it. So here we look, we take a deeper look at how do we calculate and organizations return on investment. So if we take our strategic goal identified in a brainstorming activity, the first

was to expand territory over a five-year period. The strategies we identified to accomplish that include hiring staff, renting office space, increasing marketing, and obtaining licensure. So now the next piece of work we need to do to calculate our return on investment is actually to factor out the anticipated cost of the steps toward the goal. So we are projecting the staff, the cost for staff at about $65,000 per year. The cost for office space is $5600 per year per the cost for marketing is $6000. And the cost of licensure is a one-time $5000 fee. So to try to annualize these expenses will add the recurring expenses of staff, office space and marketing which totals $76,600, and then we factor that out over 5 years because that is the term of our strategic goal and that total $383,000 and then we had the one-time licensing fee of $5000 and so our net projected costs over 5 years is $388,000. So now, working with that anticipated net cost of $380,000, we need to consider what is the potential gain annualized. So here in year one, we do not anticipate any estimated gain. In year two, we are projecting a $20,000 profit margin. In year three, and it's a $50,000 gain and in year four, $80,000 income and in year five, $120,000. It with that game, it is $270,000. So in implementing the ROI formula and if we could actually jump back to slide 18 for one moment, here at the top, you see ROI equals the gain from investment which is your net gain minus the cost of investment which is your net cost divided by the cost of investment. We can go back to slide 21, please. You see in the third column under calculation our gain of 270 minus our cost of 388 equals a loss of 118. We then divide that cost or we divide that calculation by the cost of $388,000 and we find that we have a 30% loss in total. However, the thing to consider for this organization is that the projection suggests it would be profitable by year 4. Look at columns 1 and 2, you see that an annual cost of doing business is 76,000 $600 but by year four, the project to gain of $80,000. So they project that they will be generating a positive annual ROI of 4.4% in year 4 and that jumps dramatically to a gain of 56.6% in year 5 or return on investment of 56.6% in your 5. So the thing that is interesting here and will really informed this organization and the sample organizations decision is can they withstand the losses in the early years for a positive return on investment in the out years. Here's another example of the calculation of return on investment. And this was the second potential strategic goal around increasing the line of service. To break this down, we see that the strategic goal is to increase individualized lines of service . The strategy to accomplish is to hire staff, and increase marketing. They project that the hiring a staff will cost $325,000 over 5 years. And there will be $10,000 per year for marketing efforts. So that combined yield a net cost of $375,000 over 5 years. Following the same ROI calculation process, this organization, the sample organization is projecting an estimated gain of $76,000 per year . And that mapped out over 5 years suggests a net gain of $380,000. So factoring that into the calculation, we have the hundred $80,000 gain and $275,000 loss , cost, excuse me, with a $5000 net. Divide that by the $375,000 cost and it is a 1.3% return on investment. So at the organizations decision point, is the potential return on investment worth the investment of resources to generate that ROI ? As we mentioned, sometimes organizations make a decision about a strategic goal that will not yield a profit or in some cases, it will not even incur a net loss over time, but it is alive with our mission and they may make that decision to proceed anyway. We want to now turn toward looking at trends. Historical trends on revenue and expenses should help you evaluate whether your projections are realistic and attainable. These trends can also be used to identify problem areas or opportunities in your business model. A simple method is to record and graph your monthly expenses over a designated time period. For established businesses or lines of service, this period should be greater than the years he can realistically see the full spectrum of trends that you have experienced. Let's take a look at a couple of trends. In this example of a general revenue expenses, revenue is increasing with higher net expenses and three of four quarters in 2018 for the company also generated a profit of $4800 and 2018. However, the broader view, including projections , shows a different picture. The overall trend illustrates a relatively flat lined with a much steeper expense trend. This indicates a problem with the business model that requires immediate attention. The expense trend is clearly increasing at a much faster rate than revenue and must be addressed.

In this example of projections to expand territory, revenue is increased dramatically while expenses are flat. A quick look at the math shows this project is projected to lose approximately $118,000 over the initial 5 years. But again, the graph shows the story a little bit differently. The projected losses here decrease in each of the first 3 years and begin generating positive margins in year 4. The total margin gains do not exceed expenses during the first 5 years. They clearly trend in a positive direction and will yield a positive ROI beginning in your 4. This early investment and associated losses will establish additional positive ROI in future years and will diversify the revenue stream. And the third example of evaluating trends is the example of projections to increase a line of service. The organization has chosen to invest in a new light of service. Although the ROI is positive from here forward, the answer is not that simple. The investment is significant and should be evaluated against other possible opportunities. You can see here that, from the beginning, for the foreseeable future, there is significant investment in resources and significant financial investment and flat growth. So the organization would have to evaluate if this particular project is with the return on investment. Another way to prioritize is to look at areas where organization is most at risk because it does not end just at ROI. Common risk areas include reliance on a single inability to me the multiple payers. If a state should transition to manage long-term services and supports, then CBOC to prioritize those relationships , understand requirements and negotiate and reimbursement rates with the managed care organization responsible for the delivery of the service. If the organization is unable to successfully negotiate a contract with the incoming payer, the CBO may be at risk to lose a significant funding stream. Having the correct mix of services is also an important factor to overall profitability and business growth. To look at your service makes, you'll want to assess the ROI of each service. For example, some services such as housing assistance, independent living, skills training, or employment supports, may provide the most overall revenue for an organization whereas other services serve specialized functions that approve your visibility with the payer pick maybe organization is able to meet a specific need that no one else can provide. By meeting this need at a breakeven or lower profit point, your organization may become the preferred provider for the payer. Individual services may be unprofitable or have limited profitability in the short term. But ultimately, it will benefit your business growth or sustainability of other services. You must evaluate and monitor the circumstances closely so that they help and do not hinder your organization. Finally, there may be some services that you provide that are at the core of what you do and why you started as a mission-based business in the first place. If these services are critical to your mission but are not bearing, consider whether or not you are able to continue providing them. If you must, see how your other profit bearing services will cover the financial losses. This is a dangerous path and one your Board of Directors should monitor very closely. To help you identify the top priorities for your organization, organized your results with all of the considerations in mind, doing or not doing something will cause of the loss of business or in current sanctions, doing something resulted in additional return on investment and doing or not doing something will further the organization mission . Rank the initiatives that will most greatly benefit your organization. Let's take a look at an example. You may identify a number of potential priorities for your organization through this exercise. Priorities will vary for each organization and even possibly in service areas within your organization to achieve success, you want to strike a balance between maximizing all opportunities while not overestimating or overextending capabilities pick this table helps an organization understand and articulate why they are doing something. And so here, if you take a look at the first two rows, this builds on the strategic goals that you have been walking through so far. The first one to expand territory over a five-year period, we have talked about the strategies to accomplish the cost of the strategy, the return on the investment. And then it appears that this is not a risk, it does not affect the organization's risk, and it is not necessarily aligned with the mission. But the second one to increase individualized light of service, we see that even despite a smaller return on investment, this is identified as being in line with the organization's mission and is likely therefore worthy to pursue. Another way to look at priorities is to define your own criteria, priority mix, excuse me, a priority matrix is an analysis and decision-making tool used in project management, business analysis, and business process improvement systems using a priority matrix tool for project prioritization and selection is a classical application of planning and analysis techniques. This example allows you to evaluate your various priorities across an array of criteria pick the exercise then it tallies the number of responses it helps you rank priorities. Using the same two proposed strategical, expanding territories, the Capri key criteria identified for this organization is having a large number of people impacted . Are the in compliance with federal and/or state requirements? Is there a positive ROI? Is it an expanding trend? Is the goal actionable and feasible to implement? And is there a reasonable time or reasonable resources required? For expanding territory, they found that, yes, there is the potential of a large number of people impacted. It is in line with state and federal compliance pick it does not have a positive ROI. It is not

an expanding trend, but it is actual and feasible. So this particular strategy across the criteria identified by the organization yields a total of four yeses increasing the individual service line yields a total of six. So step to plan workbook has you walk through your array of proposed strategies in this framework and identifying the total value for each of them as another method of helping you determine what your priorities are. Those that have the greatest number, the highest number total, they may be the priorities you want to focus on. Organizational growth strategies , CBOs may find themselves fluctuating through various stages of growth as they navigate change. Even organizations with this essential history may find themselves in a survival phase of their environment changes such that the current surfaces or methods of delivery are no longer relevant. You may also find that different service lines are in different stages of growth. It is essential to understand this element because you may need to triage a particular service line before it negatively impacts the organization overall. Another way to prioritize is to prioritize based on the stage of organizational development.

For example, stage one, survival, if your organization is in this stage, you may be having difficulty paying bills sometimes are maintaining your clients or people served. As such, your organizational priorities are likely to include getting referrals, generating revenue, and adding value pick in stage II identified by maintenance and improvements, at this stage, your organization will attempt to preserve certain survival techniques while refining efficiencies and creating prophecies to prepare for growth. Your organization will be refining policies and procedures to improve efficiency pick in stage III, growth, new opportunities may put your organization in a state of growth. Growth is generally limited by small set of factors at any given time. It could the people, money, operations, or strategy. And the trick is to focus your efforts on removing that constraint. Stage IV, sustainability, this requires that an organization focus on external and internal factors. Organizations balance time and effort on both business

development and operations. You may need to update internal systems to meet reporting requirements, prioritize relationship development, data collection, and services development . While it may be important to grow the organization, it is important for organizational management to provide resources and incentives to staff members

in order to retain quality employment, quality employees. There must be a solid a structure within the organization to handle the growth that is achieved. So now we move into section CDH, organize pick within this section, we discussed diagrams, strategic plans, and operational plans. Our driver diagram is a visual display of a theory of what Dreiser contributes to the achievement of the project sparkles . smart goal is one that is specific, measurable, attainable, realistic, and time-limited.

I diagram can be used to describe the elements that need to be in place to achieve the goal and illustrates the relationship between the overall goal of the project and the primary and secondary drivers that impact the successful implementation of that goal. It progressively identifies the specific factors that impact the work that needs to be done in order for you to achieve the goal. Let's take a look at an example. In this example, the state of Missouri identified a need to reduce the use of emergency departments by those receiving personal care services to the system and state plan. They wanted to reduce the use of emergency departments by 25% over a five-year period. Actually, that is over 20% over a five-year period. They identified that, in order to do this, provider staff needed to be aware of the health history of the individual and the staff need to be properly trained and properly equipped. They also identify data need to be usable, relevant, available, and finally the people served needed to use the available resources. From here, they identified a number of secondary drivers, including a need to have a care plan that is decentralized meeting it includes appropriate health focus and providers need to be trained in health literacy and available resources, and the state needs to identify data requirements for health monitoring and ensure a continuous access to data and that individuals need to be educated on appropriate health measurement techniques. So if you look at the flow of the driver diagram, we see the smart goal is clearly identified as measurable and is time-limited. And then this organization , this teen that was one of our teams, actually, it developed the primary driver said he found that there were four areas that directly affect their ability to achieve their goal. The first is that staff must be aware of the health history of the people they serve and that staff must be qualified and trained and properly equipped, that the people served utilize the available health resources. So they thought that those four areas working together will produce the change they want. And then the second drivers are more specific actionable steps. They help move the go forward. >> Understanding what drives your organization impacts the goals you have for your organization can help you outline the steps you need to take in your strategic and operational plan. The best way to achieve results is to have a well-designed plan. There are a variety of plans that can be used to help you organize, execute, and track success of your efforts. A strategic plan is a long-term, generally five or more years long-term plan with an inclusive and broad reaching approach that utilizes information and data from all sources. A strategic plan is intended to close the gap for organizational success in the future pick the organizational plan is a short-term plan that focuses on the achievable activities that can be completed within a relatively short time, usually about a year. The operational plan is a project management document that you can use to monitor daily operations of the organization and ensure that you are on track to reach your goals. A combination of the strategic and operational plans will provide the structure to lead a monitoring organization. And as we look at this representation of the strategic and operational plans, you can see how it is really continuous, a continuous process. You start with the environmental scan, you develop a strategic plan that will last 3 to 5 or more years . From there, this disease, from the strategic plan, you develop an annual operating plan. You implement the operational plan and then you evaluate the results. That happens on an ongoing, when you're basis and should be reviewed at least monthly. After evaluating a result, you take that information to inform your ongoing environmental scan as well as the SWOT analysis. So this is a real robust strategic and operational plan is one that is in continuous review.

Elements of a strategic plan, we have our organizational goals and objectives, strategies, and the resources that are available to support those activities. As you develop your strategic plan, you must be cognizant of obtaining your organization's mission. Maintaining her mission takes strategic discipline. Management and board members we need to meet regulator to assess whether completed work and propose projects aligning with the mission. The strategic plan must support the mission of the organization and contain goals that are measurable, to find what you are trying to achieve, and as you move into the operational plan, you outline in greater detail the resources and who is accountable for what elements of the plan. The operational plan provides an organization roadmap to how your organization will achieve its goals in the current year. It helps those responsible for the work to monitor their progress and incorporates the following elements. Part one is business description and strategy. Is a narrative that precedes your plan. It includes an executive summary that summarize important aspects of your organizational mission, vision, and strategic plan and it should provide an overview of your objectives in that concise way pick it includes a business description which consists of the organization vision and mission as well as a description of the business model of the organization. It includes a market analysis which summarizes the findings from your environmental scan and your SWOT. It includes your strategies, outlining the strategies for the levying and delivering services pick it includes responsibilities of the accountable person and the budget allocations in the financial projection. Part two is the project management tool itself. It monitors progress the targeted goal of the initiative identifies the components needed to accomplish the goal of the strategic plan. These components become the target and goals of the operational plan. The project management tool also includes the criteria of success . It establishes what the criteria and the measures for determining the success of each strategy, it includes the responsibilities of the accountable persons. It includes start and finish dates for each strategy. It outlines the people supporting and the departments which reinforces communication between the accountable persons or departments and managing them to remain on track. It also includes the budget allocation for the goal which identifies the necessary funding and resources that will be delegated for the target goal. It is essential that you identify the success criteria which should include how you will note you have achieved your goal, who is responsible, even if there are others working on the same goal or parts of the project, who are the supporting players and what is the budget. And then the fourth element of step 2 plan is manage. This component of the plan talks about the management tools and your communication plan. Now that you have the tools in place, you want to monitor to ensure you meet your goal. You will want to be nibbling your ability to adjust a strategy and they do not result in outcomes you anticipated. Leadership vision strategies and overall coordination requires a structure to ensure that the change in desire is implemented timely and effectively. Employing the disciplined practice of project management whenever possible can help your organization implement a structure change. Project management entails addressing all aspects of a change process from beginning to end including an approach to planning, executing, and control the activities associated with change. Navigating organizational change can be difficult, especially for mission driven CBOs that are trying to adapt their business models to new endeavors or the demands of a changing business environment. The use of management tools and techniques can help you identify and work through organizational change and way that aligns your organization's mission with its future direction. These are a few project management tools that are prevalent in the research pick you may have a different one that works for you pick but the important take away is maintaining momentum around any strategical and operating plan is crucial to the success of your organization. Without structured accountability and feedback, it is easy to become distracted with day-to-day activities. And that is when plans are often shelved. Fight until it feels right for you and your organization. Just implement it. The final element in step 2 , plan, is helping you to develop a communication plan. In this portion of the module, we talk about the need to determine the audience that needs to be reached to implement a plan. What do you need from different groups and what is the purpose of the audience, it may be to understand or implement the change to gain by and. Know what you need from different groups in order to tell your message most effectively. Consider the order of communication. For example, your board may need to be informed first followed by staff or other stakeholders in the public. Can indicate at key times such as around planning , decision-making, and implementation. Utilize

your champions which is discussed in step 1, prepare. Utilize your champions in the communications plan. Endorsement from a trusted and respected leader or peer will be the most cost-effective and reliable form of advertisement for your organization. Make sure the message is clear and effective about your goals. For instance, verify the goals . Ensure accessibility to any of your materials. Get the plan approved by your leadership board and advisory committees. Their support is critical. To this at regular intervals or at regular benchmarks, not just at the beginning or at the end. Establish milestones for consistent messaging, for instance, benchmarks for implementing the communications plan, and set up regularly scheduled meetings are calls to provide updates and take questions from staff. And finally, identify other avenues to receive feedback in addition to the typical avenues such as consider setting up an anonymous survey for yourself or community partners to identify what questions may need to be answered. Surveys can be an effective tool to obtain honest feedback that require additional considerations. Here is a simple track until I can help you manage your communication strategy. Identify key stakeholder groups and white type of information they each need. That runs out the elements of step two, plan. At this time, I would like to turn it back to Erica to share with you information about the upcoming step three, execute.

The next step is executed. Step three will walk through operations and stability and financial management and payer relationships and collaboration. Diving into deeper examples of how to define organizational stability, improve operational efficiencies, financial stability, and so forth, looking at business operations, a chart, technology, business process efficiency, financial, managing a budget, cost allocation, and contracting and negotiation, how to demonstrate value, how to look at and understand what different reimbursement methods and pricing is, so that is to come in the near future. We will be talking about those steps in upcoming webinars. So this is a time where we would turn to the Q&A portion and I do want to remind everyone that this and archives of all of the webinars can be found at the website . This webinar will be uploaded by the end of the week. There's a question regarding the toolkit itself. There's no cost to the toolkit . Model 1 can currently be found on the website. Module 2, step 2 will be released very shortly. And everybody that is connected to our distribution list will receive notice of that. If you have any other questions, please enter them into the lower right-hand corner of your screen if there are none, we will go ahead and conclude today's webinar. Thank you all for attending. We look forward to have you join us on future webinars. Take care.

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