

Overcoming Resistance to Strategic Planning

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There are countless challenges that health systems may face in developing a strategic plan. Below are some of the more common reasons we have found for reluctance to plan. We have also included some thoughts on overcoming understandable hesitation.



REASON 1: “WE’RE TOO BUSY KEEPING THE ORGANIZATION OPERATING.”

Those in the C-Suite or on the board of a health system are often under pressure to respond to strategic and tactical threats and opportunities as they arise. They may be focused on a one-project-at-a-time response to capital projects or strategic initiatives. As a result, comprehensive planning is put off for later, “when there is more time.”

What can be done: The CEO and board of directors need to understand that strategic planning is their most important responsibility. It is their job to chart a course for the future and safeguard the organization’s mission. Strategic planning allows the board to meet its fiduciary responsibilities by providing a guiding course for the organization. It also helps ensure that resources are appropriately allocated to those activities that support the mission, vision, and goals.

It’s important that planning staff not be drawn into operational initiatives or the details of project implementation; those are more appropriately handled by operational teams. In this way, strategic planning staff will have the time they need to support a focus on the future.

REASON 2: “WHO HAS THE TIME?”

Strategic planning requires input from senior leadership, often in the form of full day retreats, as well as input from stakeholders across departments, service lines and functional areas. Gaining input from such a broad range of stakeholders or setting aside time from day-to-day responsibilities can be quite difficult.

What can be done: Build in time for planning by scheduling it well ahead, a few times a year. That way, executives can build their other responsibilities around the planning calendar. It’s crucial to gain commitment from the executive team to not schedule over these dates no matter what. Scheduled activities would include annual, full-day sessions to focus on revising or kicking off a revision to the plan, as well as half day sessions to fit in status updates and evaluate how the organization is doing against the plan.

REASON 3: “IT DOESN’T GO ANYWHERE.”

This is a perfectly rational response to watching development of a book-oriented strategic plan, which is then “put on the shelf.” When the development of the strategic plan does not change the organizational direction, and people continue to do what they have always done, it’s natural to resist investing time in the planning process.

What can be done: A vital planning process which engages leaders and staff throughout the organization will build commitment to the recommendations that emerge during that process. It’s essential to establish an infrastructure for implementation, including a detailed implementation plan that assigns accountability, specifies timeframe, and estimates resource requirements, and to develop metrics and progress report templates to track success.

On another level, it can be helpful to make an explicit connection between strategic goals and compensation. Compensation plans need to align with strategic goals if people are to change their behavior to support those goals, particularly if there is accumulated resistance to such changes. Each key initiative should be led by one executive who will be held accountable. Ideally, each executive should only have to focus on two to three initiatives.

REASON 4: “WE ALREADY KNOW THE ANSWERS”

Those who have gotten to the C-Suite can draw on a lot of experience. They may not see the need for a formal planning process that includes things like an internal data assessment.

What can be done: Let them know the facts: Research outside the healthcare field has demonstrated that data-based recommendations and those developed based on diverse stakeholder perspectives result in the most significant amount of implementation. Plans developed in this way also offer the greatest adaptability to the changes in circumstances that inevitably arise during implementation.

REASON 5: “WE CAN’T AFFORD TO DEVELOP A STRATEGIC PLAN.”

Completing a comprehensive strategic plan can be expensive, especially if a plan has not been developed for some time. When there are competing budgetary priorities, the benefits of immediate investments in the latest technology or a new facility may seem more tangible than the benefits of planning.

What can be done: Build the costs of strategic planning into the budget as an annual cost, with a more intense planning process at least every three years. Ultimately, strategic planning is a process for making choices and allocating resources to the highest priorities. Good strategic planning focuses resources on their best use, and is the most effective way to allocate the organization’s scarce resources, providing the organization with a return on its investment in planning.

REASON 6: "IT'S IMPOSSIBLE TO PREPARE FOR THE FUTURE."

Some people simply perceive that the future is basically unknowable and feel that any efforts to create scenarios about the future are pure speculation.

What can be done: Those in this camp will never be truly engaged in the strategic planning process. However, you can still benefit from their viewpoint if their participation is mandated. These people can make great contributions in scenario planning; as devil's advocates, they will always spot potential holes in the plan!

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Organizations that engage in strategic planning are more focused, have more engaged and coordinated stakeholders and, are more likely to achieve their goals. It's worth the effort to overcome resistance to strategic planning. ●