Get Out of “Stall” Mode: New tools for strategic success

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New England Home Care and Hospice Conference and Trade Show

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Challenges in Home Health and Hospice in 2019 and beyond:
Quality Measures
Competition
Technology
and more....
We cannot leave success up to chance.
We need to **plan** to succeed

- Who would undertake any major project without a plan?
- The challenges in home health and hospice will necessitate a major renovation in our agencies
- We need to be *strategic* in our planning and management of our organizations
The need for strategic management in health care organizations:

Increasing rate of changes that pose challenges

Strategic decision making

Optimization of profits; “no margin, no mission”

Increase motivation of employees
Get a Jump Start

Get started on your plan
...Or *resuscitate* the one you have
How to Get Going
1. Identify the participants

➢ Board of Directors or Owners

➢ Senior Management Team

➢ Other Levels of Management

➢ Facilitator
2. SWOT analysis

➢ Internal: Strengths & Weaknesses

➢ External: Opportunities & Threats
3. Identify overarching goals

- What is the vision?
- What will we look like three years from now?
4. Identify strategic goals and SMART objectives

- Specific
- Measurable
- Achievable
- Relevant
- Time-bound
5. KPI's, assumptions, actions

➢ Identify key performance indicators

➢ Review underlying assumptions

➢ Identify immediate and key corrective actions needed

➢ Identify extra resources needed

BUDGET
6. Review plan with...

➢ Owners/Board

➢ Senior Management

➢ Full Management Team

➢ Other staff as appropriate
The Planning Continuum
7. Implement and Monitor the Plan

Subscription-based project management tools include

➢ [https://asana.com/](https://asana.com/)
➢ [https://www.achieveit.com/](https://www.achieveit.com/)
➢ [https://www.atiim.com/](https://www.atiim.com/)
➢ [https://www.atiim.com/](https://www.atiim.com/)
➢ [https://weekdone.com/](https://weekdone.com/)
➢ Or create your own DIY...
## Operations project plan

### Planning:
- Initiative goals and targets
- Finalize workback plan
- Set OKRs and quarterly goals
- Finalize external agreements and budget

### Milestones:
- Hold kickoff meeting
- Gather marketing and sales input
- Set up tracking and revenue targets
- Build dashboards and share with team
- Define targeting and systems needs
- Identify tracking bugs and prioritize fixes
- Rollout new system to select team to get feedback
- Implement feedback based on beta group
- Schedule team trainings
- Company-wide rollout
Weekdone.com

0. Improve our document and information management procedures
   0%

KR Implement a better system for tracking incoming requests
   1%

KR Review software options for incoming document tracking
   18%

KR Start compiling a weekly "Office highlights" newsletter to all team members
   24%

Overdue

Amount of delayed tasks over 1 week old that people did not manage to mark as progress yet. Clickable to see specific items.

Legend: Job Satisfaction | 5-point questions | Overdue | Problems | Completion | Weekscore

Happiness: 3.5 | Team Spirit: 4 | Energy Level: 2.5

Problems: 1 | Overdue: 18

Completion: 23% | Weekscore: 61
## I. Quality

**GOAL:** I. A. Focus efforts on maintaining and/or improving 5 STAR measures (currently 4 STAR)

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<thead>
<tr>
<th>Current Objective</th>
<th>Lead Person</th>
<th>Start Date</th>
<th>End Date</th>
<th>Progress Notes</th>
<th>Progress Note Date</th>
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<tr>
<td>Analyze outcome data to identify 3 priority areas.</td>
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<td>Identify changes in clinical practice to address these priority areas.</td>
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<td>Educate staff.</td>
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<td>Analyze results and make adjustments.</td>
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**GOAL:** I. B. Come into compliance with the new Conditions of Participation by January 2018.

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<td>Policy and procedure development, education, forms development, job description changes, and decision on whether to continue Professional Advisory Committee.</td>
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8. Regularly monitor progress

➢ Monthly reports
➢ Quarterly meetings
➢ Team holds each other accountable
➢ Iterative process
➢ Communicative/team building process
Discussion
and
Q & A