

# An Integrative Perspective on I.T. Strategic Planning

Challenges to Planning  
Planning Steps  
Practical Applications In: Departments  
Organizations  
Regions  
Summary of Key Ideas  
Questions



HEALTHCARE MANAGEMENT CONSULTANTS

# So..... Why Plan?

**“If you can’t  
implement it,  
then it is not  
strategic.”**

Lawrence G. Hrebiniak



*Timelines*

*Lack of Skilled IT Staff*

*Partnerships*

*Competing Priorities*

*Networks*

*Government Requirements*

*Performance Measurements*

*Lack of Business plans*

*Outsourcing*

*Workforce  
Planning*

*Project Management*

*Privacy*

*Enterprise Cultures*

*Budgets*

*Infrastructure*

*Enterprise Solutions*

*Extranets*

*Software*

*Architecture*

*Standards*

*Knowledge Management*

*Integration*

*Best Practices*

*Multiple Vendors*

*Acquisitions*

*Intranets*

*Information Security*

*ROI*



# Step 1: Plan the Plan

- **Clearly delineate the scope**
- **Define the purpose of the plan**
- **Identify constraints to planning**
- **Identify stake holders**
- **Create Project Charter, or Definition Statement**



# Department, Organizational, Regional Practical Application

- **Select a Steering or Planning Team**
- **Formalize a Consensus Approach to Decision-making**
- **Define a Budget for the Planning process; establish a group moderator**
- **Consult with Key Stakeholders in the Organization(s)**
- **Clearly Define Team Members, Consultant, and Stakeholder Responsibilities**
- **Establish Organizational Readiness for IT Strategic Planning Process**

## Step 2: Document Business Strategy

- Describe the Facility, and Background
- Conduct an Industry Analysis
- Document Vision, Mission, Values
- Define Core Business
- Define the Financial Picture
- Define the Strategic objectives



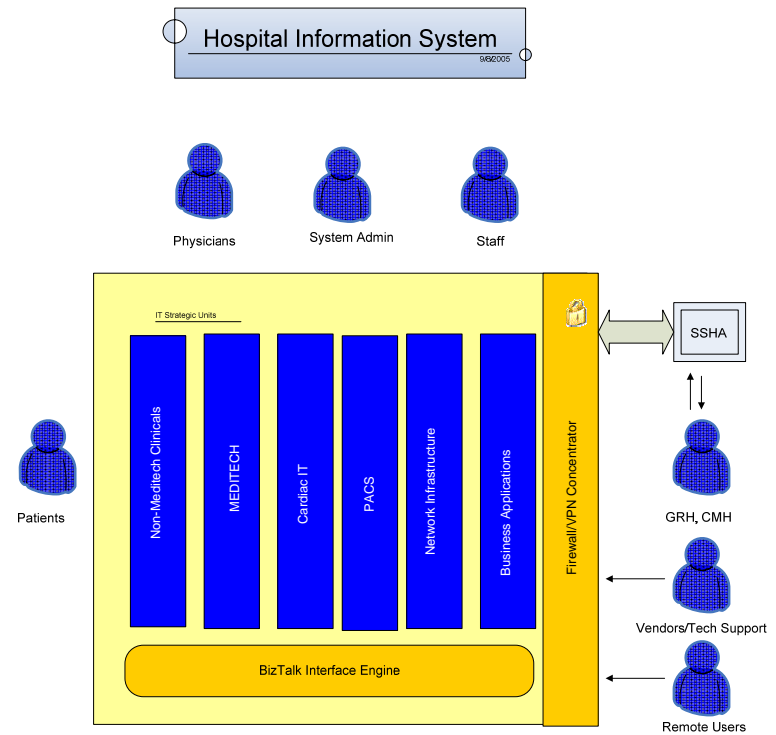
# Department, Organizational, Regional Practical Application

- **Review all Departmental, Organizational, Regional Strategies:**
  - Integrated Health Services Plan
  - eHealth Transformation
- **What is the Capacity to Absorb Change?**
- **Is Core Business:**
  - Tertiary, Specialty Care, General Medicine, Surgery
  - Community Care
  - Chronic Disease Management
  - Mental Health



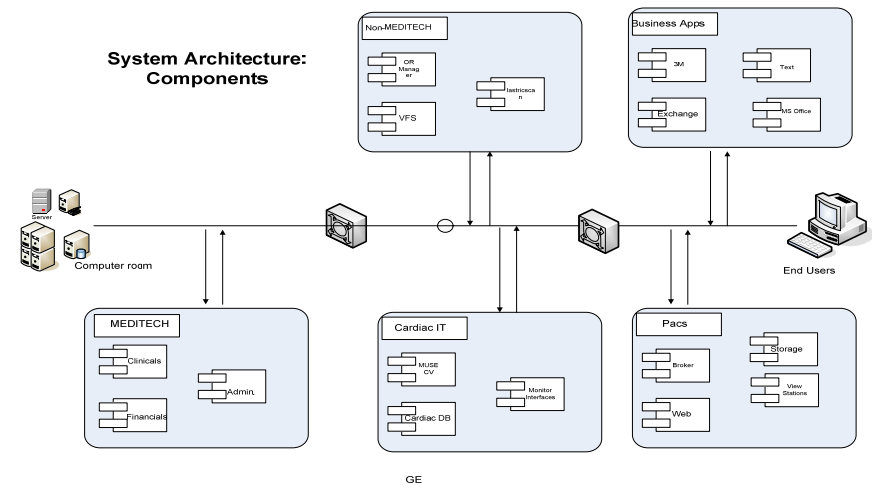
# Step 3: Assess the Current IT Situation

- **Document Your IT Organizational Infrastructure**
  - Organizational Chart
  - Use of Consultants, Outsourcing
  - Map skills of IT staff
- **Document IT Architecture: Hardware, Software, Interfaces, Links**
  - Equipment inventory, vendor directory
  - Diagrams: Network, Data Flow, Business Models
- **Audit Current IT Projects**
  - Analyze current IT expenditures
  - Document current IT projects
- **Understand the IT Environment**



# Department, Organizational, Regional Practical Application

- **What Are the New Industry Trends:**
  - VoIP
  - Consolidation & Integration
  - Wireless
  - Biometrics
- **Outsourcing is a Popular Concept.....** Will it Work in Your Organization? Or is it More Cost Effective for Multi-organizational Consortium? For What Roles/Skill Sets?
- **Is it Cost Effective to Maximize the Core Competencies with Staff, and Fill in the Specialized Roles with Consultants?**
- **Is it Cost Effective to Utilize Outside Experts for Implementation, and Internal Staff for Maintenance and Support**
- **Do Your Current Service Level Agreements Address the Real Work and/or Demands?**



## Step 4: Propose a New IT Situation

- **Analyze IT Strengths and Weaknesses**
  - S.W.O.T. Analysis
  - Governance
- **Brainstorm Technology Opportunities**
- **Propose Future IT Directions**

## Step 4: : Department, Organizational, Regional Practical Application

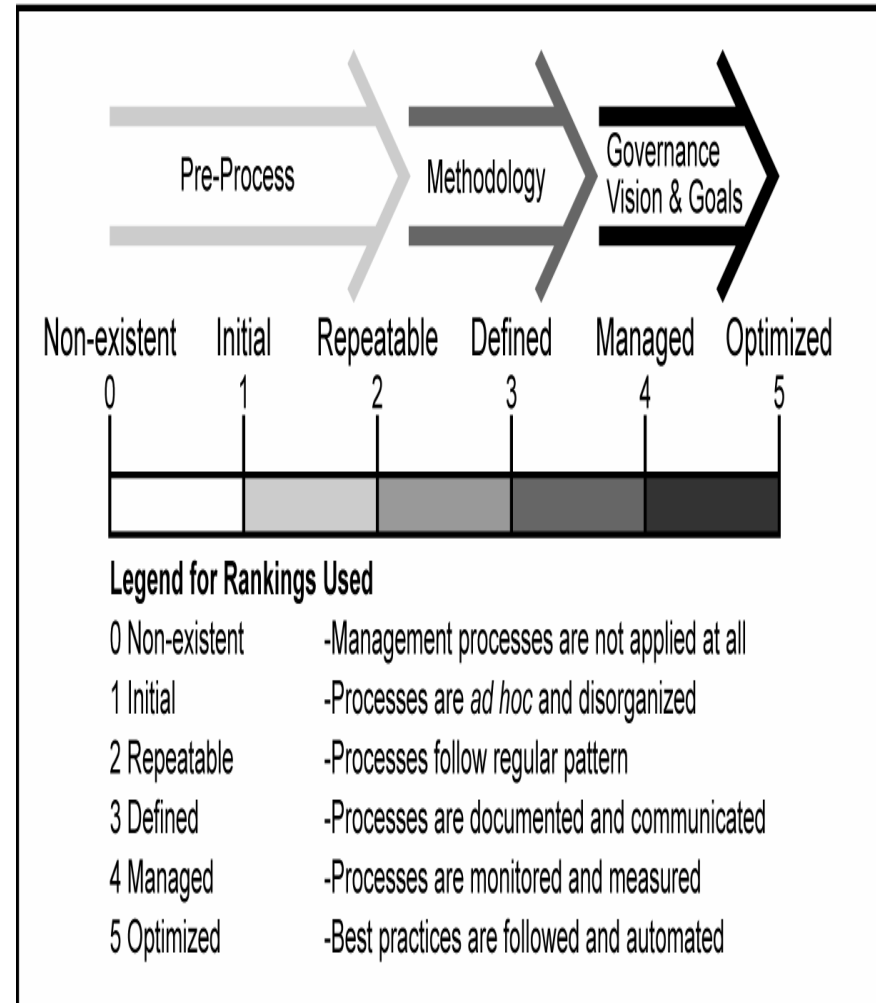
- **S.W.O.T.**

- How critical is IT to the enterprise?
- Are IT core competencies maintained at a sufficient level?
- Is there an effective Project Management Methodology?
- How often do IT projects fail to deliver what they promised?
- Is the % of IT spending in line with the established 3-5 % of operating
- How often, and how much do IT projects go over budget?
- What are the 10 things IT could do better?



# Governance Maturity Model

- Is it clear what IT is doing?
- Are the total IT effort and Investments transparent?
- Is the Organization clear on its position related to Technology: pioneer, early adopter, follower, laggart
- Is there a formal framework defined for oversight and management of IT activities?
- Are IT activities optimally directed toward business priorities?



# Step 5: Perform a Gap Analysis

- Assess the Alignment Gaps
- Assess the Infrastructure Gaps
- Assess the Skills/ Human Resource Gaps



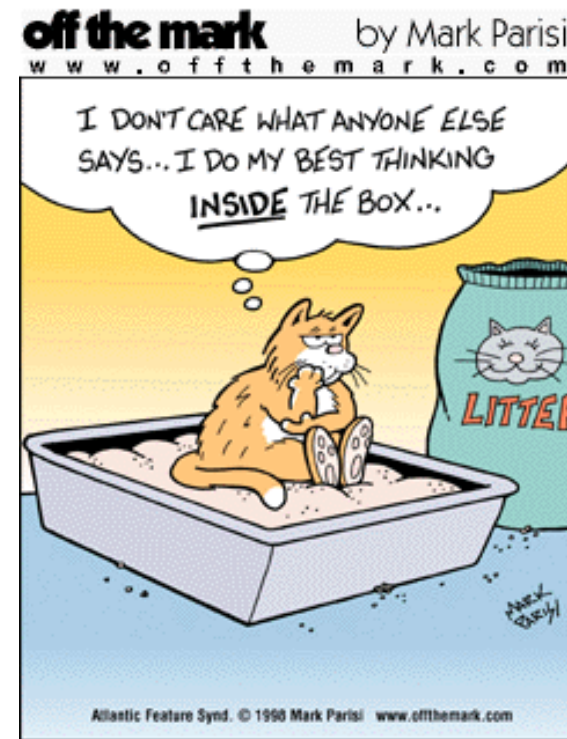
# Department, Organizational, Regional Practical Application

- is IT focused on the core business objectives?
- Can technology improve business processes, are you addressing department needs, or enterprise?
- What is the readiness for IT development in each organization?
- Do the skills of your staff meet current and future needs?
- What are the infrastructure improvements required in the department, organization or region
- What are the opportunities for integration, and/or consolidation?
- What are the opportunities for human resource/skill sharing?



# Step 6: Create Your Plan

- **Propose a Strategic Vision and Governance Model**
  - Establish a Strategic Vision
  - Propose a Governance Structure
  - List Strategic Objectives for IT
  - Document Strategic Core IT Values
- **Build a Strategic Decision Making Framework**
  - Set Strategic Goals, and Measures
  - Define the IT Investment Strategy
  - Create a set of Business Cases
  - Prioritize your projects



# Department, Organizational, Regional Practical Application

- **Governance:**
  - Memorandum of Understanding
  - Formal Partnership Agreement
  - Steering Committees
  - Service Level Agreements
- **Align Core IT Values with Organizational, and Regional Strategic Plans**



# Step 7: Communicate Your Plan

- Prepare a Written Plan
- Prepare a High Level Summary, or Picture of the Plan
- Formally Present the Plan to Stakeholders
- Continue to Inform Stakeholders of Plan Implementation
- Establish a Formal Change Management Process!!
- Emphasize Outcomes, Deliverables, Timelines
- Establish a Project Management “Office”



# Summary of Key Ideas

- **Governance Structure**
- **Organizational Readiness**
- **Solid Sponsorship**
- **Conceptual View of Architecture**
- **Well Delineated Vision**
- **IT Investment Strategy**
- **Current State Analysis**
- **Future State Analysis**
- **Clear Outcomes, Deliverables, Timelines**
- **Adopt a Formal Planning Methodology**
- **Flexible, Agile Approach to Plan Implementation**

# Thank You

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