

Strategic Planning

A weekend retreat can help your practice refocus its goals.

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There is not always a correlation between the amount of effort put into striving for a goal and the size of the achievement attained. It would seem intuitive that the more time invested and the greater the effort exerted, the bigger and better the results; yet, some of our most significant accomplishments are often achieved in less time and with less effort than smaller ones. What is it that results in the achievement of significant goals? First, one must begin with a well thought-out master plan. It is a shame that we often miss big opportunities and accomplishments due to the struggle of “getting through” our typical busy days, bogged down in the day-to-day tasks. Although we must deal with the regular, fierce pace of our prac-

tices’ daily challenges, we should make sure that we also make time to focus on major goals.

The primary reason that we miss

incomplete at the end of the day and “piles up” waiting to be “caught up” at a later time. When continuously working in this “catch up” mode, it

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opportunities or do not accomplish as much as we could is that we seldom have a master plan in place. In a busy office, days go by quickly and most decisions are directed at “putting out fires.” Frequently, much of the doctor’s and staff’s work is

difficult to set the necessary long-term goals and develop strategies for achieving them. One solution to this dilemma is to physically distance yourself from your routine office environment, at a place where you can

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devote a few days to contemplating the “big issues.”

Most businesses set aside one weekend a year for a strategic planning retreat. Few medical practices, however, take this type of “time off.” In spite of possible concerns regarding the cost of a retreat or the fact that attendees may be “giving up a weekend,” this is a routine well worth adopting. A strategic planning retreat is different from an office meeting. It must be planned in advance, and its significance is elevated by regarding it as a priority with no skimping on costs. Sometimes it makes sense for a retreat to be set aside exclusively for the doctors with the intent of setting long-term goals and priorities. At others (such as prior to implementing a project which is going to require major changes in the practice), the retreat should include the entire staff.

is more likely upon return to the practice. This is because the team that has come together at the retreat and has been instrumental in setting the goals, and those charged with implementation of these goals, have already “bought into” the plan.

The first formal retreat held by the partners of my former prac-

Should you decide to schedule a strategic planning retreat, “think big” throughout the process. This is the time to be outrageous and imagine the impossible—the keys to achieving major accomplishments. Set an outrageous goal—such as doubling the practice—a goal that requires thinking “out-of-the-box,” coming up with ideas that would

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tice was arranged for the purpose of setting goals for a major “re-computerization” of our office that was being contemplated for later in the year. The location we chose was a beach resort in California. In spite of the fact that the retreat included time for relaxing on the beach and social dinners in the evening, we emerged at the

never have been considered were you to pursue a lesser goal. Even if you do not achieve your ultimate aims, a quest that begins with a goal of a 100% increase is highly likely to achieve a result that is much greater than 10%.

At your next office meeting, suggest the possibility of a retreat for the purpose of addressing the long-term goals of your practice. Make this a high priority, pick a date that most can attend, seek ideas for a location, and make it an event that everyone will look forward to. During the months leading up to the retreat, everyone will begin to think of ideas or issues s/he would like to discuss upon arrival. It is okay to list these and have a structured agenda ahead of time, but it is essential that you leave open time for “brainstorming sessions” at which everyone will have a blank page in front of him/her and no preconceived point of view. I guarantee that if you set time aside yearly for this type of activity, you will find that your practice’s accomplishments will be “bigger and better” each year. **PM**

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A retreat environment is conducive to generating ideas, setting goals, and solidifying relationships among those who will ultimately be charged with prioritizing and implementing any plan that is developed. Participants can relax, take time to envision the ideal practice, and set a course for achieving it. It is best to set the bar high because this forces people to think out of the box and actually achieve “bigger” accomplishments. For example, if your goal were to grow profit by 10%, there would be a number of “easy” ways to achieve this; however, “upping” this goal to one of increasing profit by 100% forces you to be more creative, and this is best done in an atmosphere in which no one is distracted by daily routine. Once goals are discussed and established at a retreat, a successful implementation

end of the weekend with extensive written goals for our project and a formal plan of implementation. Instead of simply setting typical goals for computerization (which at that time was “becoming paperless”), we were also able to establish a number of broader goals designed to achieve specific results. These included employing our new system to improve both quality of service and quality of care; and to increase profitability through operational efficiency improvements, cost reductions, and improved collections. Had we not held the retreat, we would have spent the same amount of money on technology and expended the same amount of time and effort implementing the system yet would have simply achieved a “paperless practice”—with no improvement in either quality or profit.



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