



## Strategic Planning Self-assessment Questionnaire

**By Nick Fabrizio, Ph.D., FACMPE, FACHE**  
**Principal Consultant, MGMA Health Care Consulting Group**

The strategic decision-making process is designed to create organizational stability, as well as solidifying a future direction. There is little difference among groups small or large, single or multi-specialty in adopting this planning method. Physicians' time investment is typically limited to a focused 45-minute interview and a one-day retreat led by an experienced facilitator.

A client recently said, "We made decisions today that we have been wrestling with for the past 5 years." While this meeting was dedicated to strategic planning, the agenda consisted of two major issues that required resolution before the group could move forward with its service initiatives. Addressing future issues would have been meaningless if the organization neglected to establish the proper foundation.

One of the most important aspects of strategic planning is not that you have made several decisions but that you have created the proper framework for developing goals, creating action items centered on those goals, creating a method for recording, measuring and evaluating the goals, and developing a process for continually monitoring those initiatives and making them part of your operating and business plans.

This self-assessment questionnaire should help a medical group or other health care organization determine whether it can benefit from formal strategic planning. The survey identifies fundamental planning considerations and allows you to decide if strategic planning will assist your practice. For more information, contact us toll-free 877.ASK.MGMA (275.6462), ext. 1877 or e-mail [consulting@mgma.com](mailto:consulting@mgma.com).

*Check the box that best captures your group's readiness to create a meaningful strategic plan.*

1. We have a directed strategy with delineated goals.  Yes  No
2. We monitor our strategy regularly and list our progress, shortcomings, and develop action plans to address those areas in need.  Yes  No
3. We have an effective governance structure.  Yes  No
4. Has your group ever scheduled a formal planning meeting?  Yes  No
5. Do you have a mission, vision, and values statement?  Yes  No
6. Do you have external issues or forces that require major attention?  Yes  No
7. Do you have internal issues that you never talk about or act on?  Yes  No
8. Have your physicians ever dedicated one-on-one time to discuss their plans?  Yes  No
9. Have you ever used a trained facilitator experienced in health care who was focused on delivering a strategic plan linked to strategic initiatives?  Yes  No

10. Do you have an existing strategic plan that lists your goals, actions, and identifies a responsible person charged with carrying out those objectives?  Yes  No
11. Have you carefully mapped out your short-term and long-term plans matching your desires with your institutional commitments?  Yes  No
12. Have you dedicated resources to your strategic initiatives?  Yes  No
13. Have you identified your strengths, weaknesses, opportunities and threats?  Yes  No
14. Is the competition impacting your practice?  Yes  No
15. Do you make your strategic initiatives part of your operating and business plans?  Yes  No
16. Do your staff and all of your key stakeholders understand your strategic initiatives?  Yes  No

Count up the **YES** Responses:

TOTAL NUMBER OF **YES** RESPONSES = \_\_\_\_\_

**Scoring Key:**

- 13-16: You have a strategically oriented group and have already dedicated time, resources, and commitment necessary to move your strategic plans to strategic initiatives. You may only need to refine your existing plans to take advantage of the competitive landscape and position your group to be the leader in an existing or new service line. You may also need to address your succession plans to ensure that you stay on top.
- 9-12: You have a baseline commitment to strategic planning and need some fine-tuning to bring your group from strategic plans to realizing the benefits of effective strategic initiatives.
- 5-8: It's time to revisit your group's goals and reason for existence. You will need to ready your group for creating a management framework designed to focus on long-term strategies instead of decision making on the fly. Time to prepare by capitalizing on your strengths and correcting your weaknesses. You will need to determine how leadership will advance and support the strategic planning agenda.
- 0-4: What are you waiting for ? Time to begin formulating a time table to discuss the importance of strategic planning with your leadership group and physicians. You must develop a plan, which will ensure your long-term survival. Group buy-in and a commitment to business planning are the hallmarks for your success.