



CCI4EU

Strategic Planning Checklist

Component	Status	Comments
Coordination and methodological support		
Stakeholders Engaged		
Timetable		
Information sources		
Methodology		
Mission		
Vision		
Core Values		
Strategic Priorities		
Strategic Objectives		
Operational Objectives		
Action Plans		
Strategy Plan		
Communications Plans		
Reporting Plan		
Strategy Process Evaluation		

Coordination and methodological support of the Strategic Plan

Example: Quality Management Unit

Stakeholders Engaged

An effective strategy must be inclusive. The process of developing the strategy must involve those who will carry it out and those who will benefit from it. Typically, this involves three groups: 1. Managers, 2. Subject Matter Experts (a multidisciplinary group of professionals), and 3. Patients.

Timetable

A timetable is a schedule that outlines the times at which specific events or activities are planned to occur. It is commonly used to organize daily, weekly, or monthly tasks and appointments.

Information sources

An information source is a resource from which data, facts, and knowledge can be obtained. These sources can include Structured Questionnaires
Working groups of healthcare professionals
Other strategic plans of the institution

Methodology

Example of participatory methodology:



The methodology for developing a strategic plan using SWOT analysis, CAME analysis, and prioritization through Score Card can be defined in the following steps:

1. SWOT Analysis:
 - Weaknesses: Identify internal areas where the organization has disadvantages.
 - Threats: Determine external factors that could cause problems or risks.
 - Strengths: Recognize internal capabilities and competitive advantages.
 - Opportunities: Detect external conditions that the organization can leverage for its benefit.
2. CAME Analysis (Correct, Adapt, Maintain, Explore):
 - Correct: Develop strategies to address the weaknesses identified in the SWOT analysis.
 - Adapt: Create strategies to adapt to external threats.
 - Maintain: Formulate strategies to maintain and capitalize on strengths.
 - Explore: Devise strategies to exploit external opportunities.
3. Prioritization through Score Card (Balanced Scorecard):
 - Define clear strategic objectives based on the SWOT and CAME analyses.
 - Assign specific metrics to each objective to measure progress.
 - Evaluate and prioritize strategic initiatives using a scorecard that considers criteria such as impact, urgency, cost, and feasibility.
 - Develop a detailed action plan with timelines, responsible parties, and allocated resources for each prioritized initiative.

This methodology allows for comprehensive and well-founded strategic planning, facilitating decision-making and effective progress tracking.

Mission

The "Mission" is a formal statement about the purpose of the organization. It gathers the essence of the organization. Who are we? What do we do? Who does it? For whom? How do we do it? What is our purpose?

Vision

The "Vision" is a formal declaration about the organizational model to be implemented in the future. It encompasses how we aspire to be recognized. How will we get there? What steps will lead us to this point? How do we want to be recognized?

Core Values

VALUES are attributes of goodness and quality: beliefs, ideas, virtues, behaviors, habits Reflect on the norms of organizational culture that people value as atributs bons ("culture with values") Who conducts, qualities, virtues or attributes are well defined by an organization?

Strategic Priorities

Strategic priorities can be assessed through strategic lines. The strategic lines of a strategic plan are the main pillars or focal points upon which the organization's actions and objectives are based. They represent key areas of focus that will guide the development and implementation of the strategic plan. These lines provide a clear and coherent direction for achieving the organization's long-term vision and objectives



Strategic Objectives

A strategic objective is a specific, measurable goal set by an organization to achieve its long-term vision and mission. These objectives are critical components of the strategic planning process and are designed to provide direction and focus for the organization. Strategic objectives are formulated based on a thorough analysis of the organization's internal strengths and weaknesses, as well as external opportunities and threats (SWOT analysis).

Operational Objectives

An operational objective is a specific, short-term goal that an organization aims to achieve to support its broader strategic objectives. These objectives focus on the day-to-day operations and activities within various departments and are designed to improve efficiency, productivity, and overall performance. Operational objectives are typically measurable and time-bound, ensuring that they can be tracked and assessed regularly to ensure alignment with the organization's strategic goals.

Action Plans

Action plans are detailed outlines that specify the steps necessary to achieve specific goals or objectives. They include a clear description of tasks, deadlines, responsible parties, and resources required. Action plans are used to translate broader strategies and objectives into manageable and actionable tasks, ensuring that everyone involved understands their roles and responsibilities. They are essential for tracking progress, managing resources, and ensuring accountability within an organization.

Strategic Plan

The strategy plan should be documented. Do not create a massive document with highly descriptive language. Also, do not create a set of slides with maps and labels. The Strategy Plan must have just enough information to make sense to the organisation it is aimed at.

Communications Plan

The strategy plan should be shared with the organization, stakeholders, and, in certain cases, specific customers.

Reporting Plan

The reporting plan will include information about the systems that will be used to keep track of progress. Gone are the days when a strategy could be managed with a set of spreadsheets and presentations.

Strategy Process Evaluation

It refers to the assessment and analysis of the strategic planning and implementation process within an organization. It involves examining the methods, procedures, and decisions made during the formulation and execution of a strategy to determine their effectiveness, efficiency, and alignment with organizational goals. This evaluation helps in identifying strengths, weaknesses, and areas for improvement in the strategic management process.