



# Roadmap for Success

## *The 10-Step Nursing Strategic Plan*

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*This bimonthly department, sponsored by the American Organization of Nurse Executives (AONE), presents information to assist nurse leaders in shaping the future of healthcare through creative and innovative leadership. The strategic priorities of AONE anchor the editorial content. They reflect contemporary healthcare and nursing practice issues that challenge nurse executives as they strive to meet the needs of patients. In this article, the author presents a simple yet highly effective 10-step approach to strategic planning that can be completed in any nursing organization. The 10-step process provides a roadmap for the future of nursing.*

Mark Twain once said, “If you don’t know where you’re going, any road will get you there.” This is particularly relevant for the nursing enterprise. Without a roadmap, any road will get you there, but it may be a road on which you do not wish to travel.

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Strategic planning is a roadmap that takes an organization where it wishes to go—it is about charting a direction for the future. It aligns the organization around defined goals and focuses resource allocation on key results and enables priorities to be clearly defined. A roadmap for the future assures that the chief nurse executive (CNE) can execute the strategy and achieve or exceed organizational outcomes.

There is no one or best way to complete a strategic plan. If this is an initial effort, basic steps to assess the nursing organization may be the best way to begin the planning process. Other ways to develop the plan may include the use of organizational strategies with the tactical aspect developed for nursing. Organizations may build upon past plans and develop strategies that continually raise the bar and catapult the organization to a future state. Strategic planning may be focused on Magnet components. Strategic planning can be done with little more than the nursing “can do attitude.” This article presents a simple but effective planning process that can be used by a novice or experienced CNE.

Start simple, but start. Simplicity has a number of benefits.

It is viewed as part of the work of the nursing enterprise—not an “add-on.” There is no perfect process, and it is unlikely that an epiphany will occur during the planning. However, the process itself will most likely be the most significant outcome. New insight into the nursing organization often emerges.

### **Methodology**

The methodology for the strategic process does not require complexity to be effective. An effective 10-step process can be used using industry techniques and nursing know-how.

- Appoint a nursing strategic planning steering committee.
- Use strategic analysis to guide the planning, using key nursing indicators.
- Conduct key stakeholder interviews to assess perceptions regarding the nursing enterprise.
- Share key stakeholder interview and analytical data.
- Use a SWOT (strengths, weaknesses, opportunities, threats) analysis.
- Brainstorm potential strategies.
- Complete a gap analysis around the strategies.



- Develop a tactical plan for selected strategies.
- Develop metrics for the strategic plan.
- Communicate a strategic plan.

### Strategic Planning Committee

A nursing strategic planning steering committee should be appointed as a first step with the CNE as the chair. The team, composed of 10 to 12 key stakeholders from nursing education, research, management, governance, and advanced practice, steers the planning process. Staff from other key resource departments such as public relations, finance, and human resources may also be members. The initial meeting is conducted to provide structure and outline goals and objectives for the group and to address any process questions. Clear guidelines for members are critical. What is their role? How will they communicate? What is their level of authority? Resources that may be helpful to the CNE include strategic planning articles, books, or Internet resources. Internal business development or planning resources may be available in the organization. Local university faculty members may also be willing to assist.

### Strategic Analysis

Strategic analysis is a step that can be completed behind the scenes. It provides data from variety of sources that can help guide the planning process and be used to assess the state of the union in nursing. Determine what data you will collect. Human resources, finance, and quality data should be included.

As an example, key indicators may include quality data, skill mix, patient satisfaction with nursing, associate satisfaction, nursing turnover, vacancy rate, agency use, staffing ratios, nursing hours per patient day, patient acuity data, and nurse-sensitive indicators.

All metrics and key indicators in nursing should be evaluated. Establish data that are required and clearly identify who will be accountable for data collection, to whom it will be distributed, and when. Often, human resources, nursing support operations, and finance have data needed for strategic analysis. It may also potentially be found on the nursing dashboard or monthly reports provided to the CNE.

### Stakeholder Interviews

Stakeholder interviews are another important step. Themes are likely to emerge from strategic analysis that requires further assessment and validation. Use a standard set of questions that are developed by the planning committee. Questions may be centered around workforce planning, quality, associate satisfaction and professional development, nursing practice, and technology. Stakeholders may include physician leadership, ancillary and support operations leadership, nursing staff, governance members, academic partners, and human resources—stakeholders who have a vested interest in the nursing enterprise. Technology can also be used to collect survey data in an efficient and effective manner. Survey Monkey ([www.SurveyMonkey.com](http://www.SurveyMonkey.com)), an online resource, is an effective tool for data collection.

At the second meeting, data from strategic analysis and stakeholder interviews should be presented and discussed. The information provides direction for the group and can be used for the SWOT analysis.

### SWOT Analysis

A SWOT analysis is a tool for dialogue. In addition, alignment from the group occurs, along with robust dialogue around organizational SWOT components. Strengths can be built on. Weaknesses can be addressed in the strategies and overcome. Opportunities are especially key to innovation in the nursing organization. Threats may be internal or external. From the strategic analysis, interviews and SWOT themes are likely to emerge. For example, themes may evolve related to nursing quality, shared governance, clinical technology, and patient safety.

### Brainstorming

Brainstorming potential strategies on flip charts is simple yet effective. The challenge is getting to the vital few that you can accomplish, identifying strategies that are aligned with organizational goals and clearly delineating strategies that will make an impact. Multivoting can be used to identify key strategies that are aligned with the organization and instrumental to the success of the nursing organization. Criteria may be established to assist with the selection process. Five or less strategies should be a goal. Using the example above, relevant strategies may include patient safety, technology enhancement, quality improvement initiatives, and a shared governance goal.

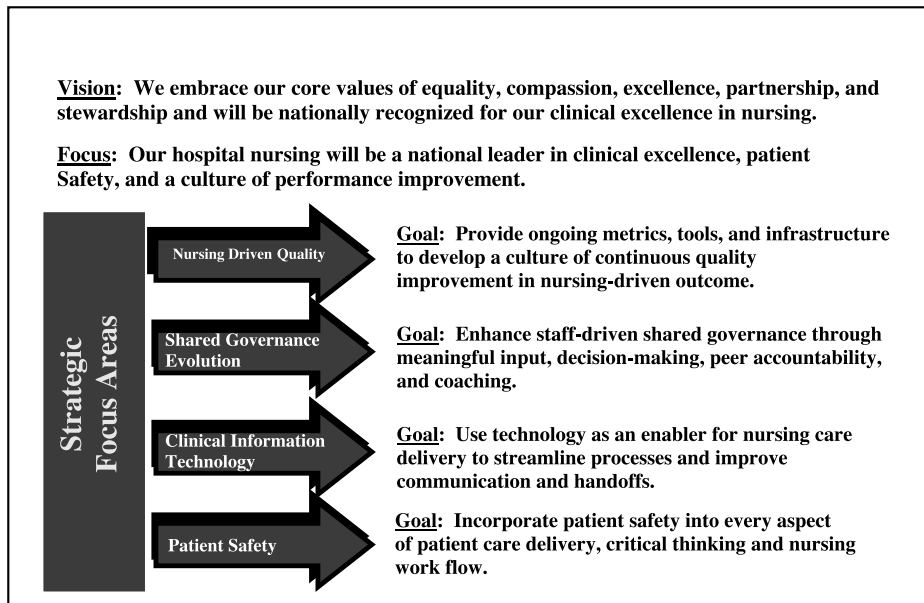


Figure 1. Nursing strategic plan.

### Template for Strategic Plan

Select a template used in your organization for organizational planning, use an industry template found on the Internet or in guidebooks, or develop one that meets your needs. A template may include strategy, tactic, anticipated outcome, timeline, metrics, and accountability as categories.

### Gap Analysis

After the strategies are developed in draft form, a gap analysis may be needed. This is an ideal time to engage staff in identifying the gaps. Tactics can be developed once the gaps are identified. Staff engagement at all levels is as important, if not more important, than the final document. Steering group members can each adopt a strategy and develop a workgroup composed of RNs and other staff associates. Again, brainstorming can be used to look at gaps that exist, as perceived by the subgroup.

Nonnursing personnel should be an integral part of the subgroups. For example, finance, human resources, and public relations may be included, along with nursing constituents. If strategy is centered on technology development, information systems could provide insight into the tactical plan. Be specific. Be concrete. Solicit input from personnel with competency in the topical area.

### Metrics

Metrics are a critical success factor. How will you assure success? Identify at least one metric for each strategy. Use outcomes measures, not process measures. Determine how and when the metric for each strategy will be reported. Will it be monthly, quarterly, or annually? To whom will it be reported? What is the data source for the measurement?

### Finalizing the Plan

Subgroup data are collected and turned into a draft strategic plan.

Staff meetings, town hall meetings, and governance forums around the clock will provide final commentary for the plan and should be conducted by steering group members. Be prepared to change the plan, based on staff feedback. Assess plan effectiveness by the level of engagement around the strategies as gauged by nursing staff dialogue and engagement.

### Communicating the Plan

An often overlooked yet critical success factor is communication of the strategic plan. Several steps should be taken:

- Identify the 4 W's—what, who, when, and where the plan will be communicated.
- Identify key audiences to whom plan will be communicated.
- Assure that the communication is aligned with other nursing strategies.



- Use multiple communication mechanisms.
  - Nursing newsletter
  - E-mail
  - Nursing leadership forums
  - Town hall meetings
  - Staff meetings
  - Letters to home
  - Nursing annual report
  - Nursing intranet

A 1-page visual that succinctly presents the plan is a way to make the plan real and an organizational focus. A graphic (Figure 1) may be used to depict the plan and aligns key components into a single, 1-page document.

### **Barriers to Effective Planning**

Barriers include lack of time, lack of strategic planning skills, perceived lack of value, and lack of organizational support. While

barriers are present, the nursing organization without a plan wanders aimlessly, jumping from initiative to initiative, creating frustration for its leadership and staff. Disengagement results because of inadequate focus and lack of resources to accomplish the myriad of competing priorities.

### **Nursing Strategic Planning—Who Needs It?**

Who needs a nursing strategic plan—a roadmap for the future? Chief nurse executives who wish to outperform the competition need it. Chief nurse executives who are passionate about superior results need it. Chief nurse executives who wish to integrate strategic and operation planning while balancing competing agendas need it. You, the CNE, manage a very large business.

### **Benefits of Strategic Planning**

Strategic planning is your roadmap for the future. Strategic planning serves a variety of purposes, including the following:

1. Establishes a clearly defined strategy for nursing
2. Provides a sense of ownership for the plan
3. Effectively uses and focuses nursing resources on priorities in the nursing enterprise
4. Promotes the value of nursing services in the organization
5. Communicates strategies and tactics and progress to the nursing community on an ongoing basis

Plan, implement, communicate, and measure. The results will astound you.