

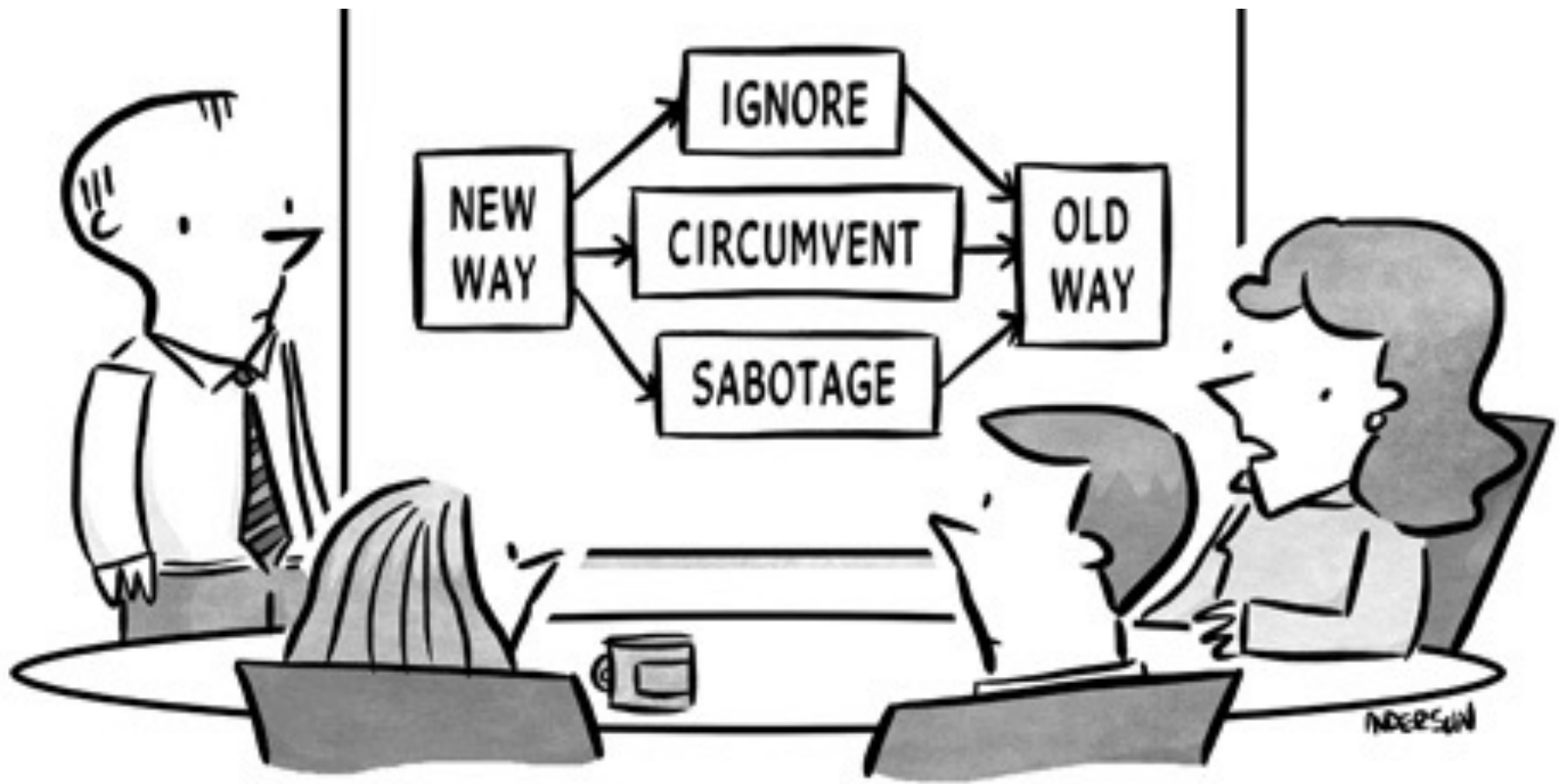
Business Planning & Goal Setting



For Primary Health Care

Session Overview

-  RACGP Standard 3 – Practice governance & management
-  Goal Setting | Business Planning
-  How do I start?
-  Reporting on your plan



5th Edition RACGP
Standard 3
Practice governance
& management

“Our practice has integrated governance and management systems that maintain and improve the quality of care provided to patients”

...must meet intent of Standard, with flexibility on ‘how’



“Our standards are very high. We even have high double standards.”



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5th Edition Standard 3 - Indicators

- C3.1A ▶ Our practice **plans and sets goals** aimed at improving our services
- C3.1B Our practice **evaluates** its progress towards achieving its goals
- C3.1C ▶ Our practice has a **business risk management** system that identifies, monitors and mitigates risks in the practice
- C3.1D ▶ Our practice has a **complaints** resolution process



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What is business planning?



ACHIEVING
BUSINESS
GOALS /
OBJECTIVES



MEASURE
PROGRESS



PROACTIVE
PLAN FOR
CHANGE



ENVIRONMENT
FOR DELIVERY
OF QUALITY
CARE



Goal setting | Business Planning

- Define governance structures appropriate to **YOUR** practice
 - Small
 - Medium
 - Large
 - Not-for-profit / for-purpose
 - Corporate

Goal Setting

- Appropriate for smaller practices
- Starting out
- Limited staff resources
- Informal business structure
- S.M.A.R.T. Goals
- P.D.S.A. cycles
- QI - PIP



Business Plan

Suitable for any size practice

More formal

Some experience with goal setting

Basic to advanced plan

- Build on the plan as you go
- Start small
- Focus areas

Think of structure – easy to use

Excel is your friend!



Goals, Planning & Strategy



Strategic Differentiation

What makes you different? Market Analysis
Where do we play?

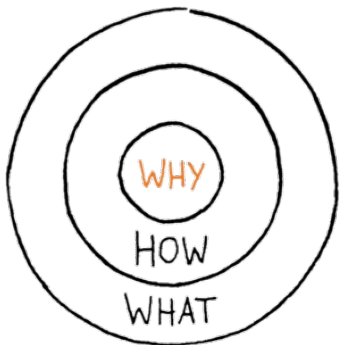
Strategic Thinking

How do everyday actions impact?
Ongoing team involvement



Business Transformation

Regular review
Re-alignment



Business Plan

Mission, Vision, Values,
Goals, Objectives,
Activities

Team Engagement

What's my role?
Communication





STRENGTHS

- What are we good at?
- What is our market advantage?

WEAKNESSES

- What are our challenges?
- Blind spots?
- Limitations?



SWOT ANALYSIS

Threats

- Competitors?
- What stands in our way?



Opportunities

- What can we do that we are currently not doing?
- Easy wins & stretch goals



P.E.S.T Analysis

Political

Economic

Socio-cultural

Technological

Macro environmental impacts on your practice

Understanding growth, decline, business position

Potential directions for next actions



What does success look like?

SMART Goals & Actions



Specific

Measurable

Achievable

Realistic

Time specified



SMART Goal - Example

Goal: *To be better informed about financial performance on a constant basis and therefore able to respond to issues quickly*

Strategy | Activity: *Using practice data extraction, we will analyse our monthly revenue for each doctor by tracking, graphing & reporting results*

Performance Measure: *The results will be reported by the Practice Manager to the practice principals on a quarterly basis*





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Where to from here?

- Take back to your team
- Involve others in SWOT/Activity planning
 - More ideas to the table
 - Collaborative approach
 - Team building
 - Increase chance of success
- Define structure for your plan



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Format of your Plan

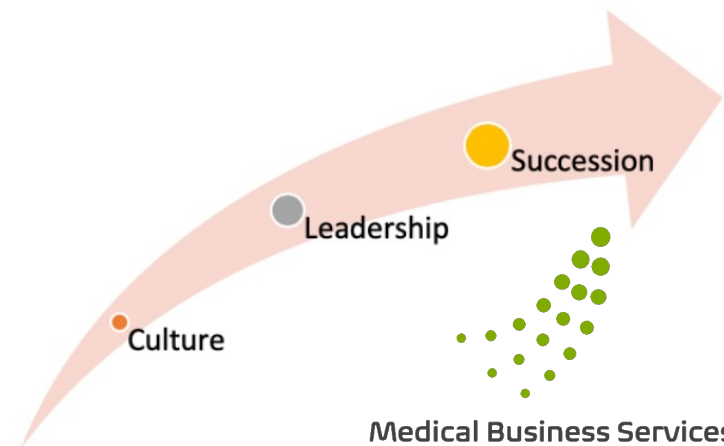
One page plan

- Mission, Vision, Values statement
- High level initiatives, outcomes, measures, activities
- Easy to communicate (staff and other stakeholders)
- 'Road map'
- Who is audience?





Your Practice Plan 2023 - 2024



Format of your Business | Action Plan

Operational plan
SMART goals
PDSA cycles

What / Who /
When / How

Date	Area	Item detail Goal Outcome to achieve (Plan)	Priority (Plan)	Due by	Recurring (Do)	Who?	Activities Review Notes Comments (Do, Study, Act)	Assessment (Study,Act)	Complete?
1/7/21	Marketing	Patients can easily find accurate information about the practice	Urgent	1/11/21	Quarterly	PM	Update website and review regularly. Update practice information sheet ? Introduce social media presence?	Minor website update 1/2/20. Consider major revamp April 2022. Discussions on social media ongoing. Decision Dec 2021	Ongoing
1/7/21	Clinical meeting	Review new patient policy	Routine	31/12/21	No	PM	Define geographic boundary to ensure we meet community needs for new patients. We will include postcode(s) ...(specify)	Able to accept new patients living in local postcode.	Active progress
1/8/21	QI	Database cleanse to remove duplicate patients	Routine	1/9/21	Twice yearly	PM	Cleansed data allows for accurate CDM recalls	Last performed Feb 2021	Ongoing
1/8/21	QI	Create list of all diabetic patients due/overdue for care plan/TCA	Routine	1/9/21	Twice yearly	PM	Doctors to review lists created to approve recalls prior to actioning.	Utilise nurses where possible	Ongoing
1/8/21	Finance	Maintain and improve cost control	Priority		Annual	PM	Review all budget items with aim of cost containment	Profitability maintained or improved to XXX %	Active progress
1/8/21	Staff	Implement a staff training register with skills matrix	Later	End 2022	No	PM	Investigate software options for skills matrix or develop self	Skills matrix developed. We are clearly able to identify skills and skills gaps in our team.	Not yet started
1/8/21	CDM	Improve CDM patient health outcomes	Priority	31/12/21		GPs & Nurses	Increase uptake of GPMPs/TCAs (specify by how much) and how this will be achieved	Covid impact - unable to achieve this. Review Feb 2022	Abandoned Amended
1/8/21	Covid	Participate to full capacity in vaccine roll-out	Urgent			GPs & Nurses	Increase number of weekend vaccination clinics ...	Oct 2021 additional weekend clinics : 2 GP & nurse availability good at this time. Review clinics ongoing and reduce when vaccination targets are close to achieved	Active progress
1/8/21	QI	Our clinical performance meets or exceeds benchmarks	Priority			GPs & Nurses	QI PIP - review performance against national benchmarks. Focus on any areas of below benchmark performance (add further action in this plan)	Add your details here	Not yet started
1/8/21	Infrastructure	Cosmetic upgrade of waiting room	Routine			PM	Replace old waiting room chairs	Add your details here	Not yet started
1/8/21	ICT	Modernise ICT systems and avoid obsolescence	Priority			PM	Obtain quotes for server replacement	Add your details here	Not yet started
1/8/21	ICT	Improve patient clinical data management	Later			Nurses	Investigate new software options (add your detail!)	Add your details here	Not yet started
1/8/21	Services	Patients always receive a warm welcome when they call or attend the practice	Priority	1/2/22		Receptionists	Standardised greeting Additional staff training on customer service & telephone technique	New policy & procedure developed & communicated to staff. Training session delivered September 2021. Review Feb 2022	Complete

Business Plan | Download Template!

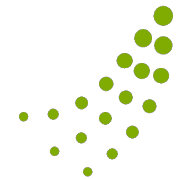
Reporting on your plan

- Format in line with requirements for your business
- Examples
 - Quarterly planning meetings
 - Report on activities and outcomes
 - Accountability
 - Systems approach
 - Spreadsheets are easy to use for this!
 - Has anything changed?
 - Responsive
 - Warning signs
 - Update strategic / business / operational plans



Key messages

- Planning has many components
- Big picture thinking
- Systems approach
- Involve the whole team
- Appropriate plans for your business
- Analysis & interpretation
- Regular reporting and review
- The first one is the hardest! Start now...



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Resources & Further Information

<https://www.medicalbusiness.services/business-planning-request>

SWOT & PEST Analysis | FREE templates

Simple Business Plan | Action Plan FREE template

- Practice Management & Risk Register Information

eLearning & Membership

- eLearning Modules & Programs
- Practice Management Fundamentals Masterclass Membership

