

Strategy Retreat—An Important Tool for Your Practice

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A man prepared has fought half the battle.
— Don Quixote

“We need to do something, but I’m not sure what.” “We can’t go on with business as usual and expect to remain successful. Where do we begin?”

These are not infrequent comments made by many practitioners as they look at the rapid changes which have impacted their practices. Whether one practices as a member of an academic department or a large group practice or even a

solo/small group, the need to assess strategies and action plans becomes very important.

Large commercial businesses have traditionally invested heavily in formal strategic planning processes and recently those processes have undergone significant critique and evolution.¹ The organization’s strategy becomes a critical component of its success and the method by which it is developed and communicated becomes the foundation pinnings for successful deployment and implementation.

In this regard, the strategic retreat becomes an important management tool for your practice and medical business. Periodically, all businesses and medical practices benefit from a special group meeting convened to review the status of operations,

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¹ Association for Corporate Growth Newsletter, Erickson, P., March, 1996.

communicate with key members and managers, update plans and confront challenges.

Who Should Participate? The strategy of your practice, division or department is built upon the personal goals, values and operating knowledge of the members and especially the leaders of that practice, division or department. Therefore, it becomes imperative for the success of the retreat that the key decision makers (Chairman, CEO and/or COO) actively participate.

Remember, what an organization accomplishes is a direct reflection of what the leadership *wants* to accomplish.

Of course, there is also need for other participants from various levels within the organization. In a small practice, this may mean a bookkeeper, receptionist or a nurse clinician. In larger practices, the managers and individuals from other key areas will need to be represented. The ideal number of people for a retreat is usually 10-12 participants, but smaller numbers are also reasonable. Groups larger than 12-15 usually become difficult to manage.

The Role of an Advisor or Facilitator. Contrary to what you may think, the retreat should not be lead by the CEO or Department Chairman. The best run strategic retreats utilize an outside impartial observer who brings a knowledgeable and dispassionate perspective to the situation. Ideally, this individual needs to have a thorough knowledge of the processes of clinical practice as well as a broad overview of the issues impacting your business. An advisor or facilitator who is accustomed to playing this role brings new and objective value to the group.

A seasoned facilitator assists the CEO or practice manager or department leader in preparing and developing an appropriate and detailed agenda and produces a solid framework for addressing the planning issues.

In cooperation with the CEO, the facilitator becomes the moderator of discussions and in so doing allows for more active participation by the CEO and other leadership.

Referable to a medical practice, it is important that your facilitator have personal experience with clinical practice, understand the nuances of medical care processes and is someone who is a good listener. It should ideally be an individual who has experience in working with all facets of the business as well as the practice of medicine and

should be someone capable of thinking like a corporate officer.

Where should the retreat be held? Ideally, the retreat should be held offsite away from the usual interruptions of the normal work day. A neutral pleasant facility or site with good audio visual and conference support is helpful and can be found at relatively reasonable rates. You may wish to couple some form of socialization and therefore will need to take that into account during your planning. Retreats often last 1-2 days. For busy practitioners the one day format is most pragmatic.

What are the typical retreat topics? Virtually all topics can serve as a theme for a retreat. Some of the topics currently of concern might include:

- Enhancing the value and profitability of the practice in a managed care environment.
- Improving the gross margins and profits of your practice in a specific locale.
- Undertaking a necessary restructuring while maintaining good patient relationships.
- Improving internal communications.
- Reorganizing or restaffing.
- Development of care guidelines and necessity for such.
- Whether or how to acquire other practices or form networks
- Clarify practice objectives or strategies.

The list is long and must reflect the issues of the leadership and the experience base of the facilitator.

How often should a retreat be held? The nature of the issues and management style of the leadership will usually dictate the frequency of the meetings. In rapidly changing environments, it may become necessary to meet more frequently. However, in general, once a year is adequate with updates and revisions occurring during usual management meetings.

Keys to successful retreats. The following issues usually will work to your advantage in planning a successful retreat.

- Knowledgeable, experienced facilitator.
- Personal involvement and positive support by the CEO/Practice Manager/Department Chairman.

- Advanced planning by the facilitator and participants (facilitator sometimes meets individually with all participants before the meeting).
- Open, candid and non-judgmental atmosphere for discussion.
- Time based agenda distributed at least 1-2 weeks in advance of the meeting.

Effective planning retreats can be critical events in the life of a medical practice or a clinical department. They provide a milieu for defining change, setting direction, developing competitive responses, discussing finances and investments, etc. Successful retreats are also helpful in establishing the values of an organization and crystallizing these for the leadership. Focused planning and teamwork result from the camaraderie and allow for continued growth and prosperity of the business and the practice.