

The Patient Experience Post

Healthcare's Resource for
Service Excellence
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Planning without Execution Is Just Wasted Effort

by Kristin Baird, RN, BSN, MHA

You've likely heard this statement before: "When you fail to plan, you're planning to fail." The reason aphorisms like this stay around and resonate is because it's true! When you fail to plan, you *are* planning to fail.

Here's an example. I often work with teams who get frustrated when "they" (administration?) won't give them money needed for service initiatives. In other cases, teams complain that "they" don't see their service team as a priority. When I hear these statements, my first reaction isn't to think badly of administration; rather, what I think is: "Maybe this team has failed to plan!"

Planning involves more than just saying, "We need to improve service." It involves identifying specific goals and objectives, creating strategies and tactics along with designated responsibilities, and—importantly—ensuring that the resources are available to achieve those strategies and tactics. Too often service initiatives fail because the service excellence coordinator or team hasn't taken the time to create an executable work plan—to lay out, detail by detail, the things that need to occur, the people who need to be involved, the timeline that must be met, and the resources (time and money) required to make things happen.

Think about the service initiatives at your organization. Is there a plan in place to achieve the desired outcomes? Does that plan include executable steps, timeframes, budget, and deliverables? Are the individuals whose time and effort is needed to accomplish the objectives aware that they are involved? Do they know what they need to do?

The strategic planning process is the same whether you're creating a business plan for a new organization, a marketing plan for a new service line, or a service excellence initiative. In fact, the process is the same for anything you want to accomplish. You must think beyond what it is you want to accomplish (your goal) to clearly identify the resources needed to achieve that goal. Further, you need to ensure that you have committed your plan to writing and that you have involved the people you will need on board in the process and that they are fully aware of what is expected of them, by when.

Most importantly, you need to ensure that they will have the resources needed to achieve their goals.

So, for instance, suppose you're engaged in a service excellence planning initiative. Things are rolling along when suddenly you realize: "Oh, we need to do some training! We have 1500 people we need to get up to speed on our new standards and expectations."

If you find yourself faced with this kind of gap between what you need to accomplish and *the resources you need to accomplish what you need to accomplish*, you're facing a crisis of execution. Yes, you need a plan, but you



also need to *execute on that plan*. You have to consider, ahead of time, the resources you need to accomplish your objectives. You have to ensure that you have secured those resources through the appropriate channels within your organization.

Suppose you're planning to initiate hourly care rounds. Have you budgeted for any technology that might be required to support this initiative? Have you budgeted for any additional materials—like door magnets to aid in the process and communication? Have you budgeted, and built into your timeline, the need for training?

Even such seemingly “small” initiatives, like replacing whiteboards or adding new amenities to waiting rooms, require time and resources that need to be part of the plan.

Another key to success: making sure that your team has an executive sponsor to support your efforts and help you ensure that they remain aligned with the organization's strategic objectives. Without such a sponsor, you're at risk of straying off course.

If you've ever been frustrated by going to senior leadership only to have them discount or dismiss an idea, it's likely because...

- Your idea isn't aligned with the overall organization's strategic plan
- You've presented just an idea and have not backed up that idea with an indication of the resources needed to make it happen
- You haven't identified meaningful, anticipated outcomes that tie to the overall organization's plan

Don't fail to plan. Plan to achieve your goals by ensuring that you've covered all of the bases. That's the way to make things happen.

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*Nurse, author, and consultant Kristin Baird, "Healthcare's Customer Service Guru," is the author of *Raising the Bar on Service Excellence: The Health Care Leader's Guide to Putting Passion into Practice* (Golden Lamp Press, 2008), *Reclaiming the Passion:**



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