

Position Your Organization for Success Through Effective Decision-Making

The constant changes in healthcare present ongoing challenges to organizations and their leaders as they must find ways to adapt to new issues (e.g. evolving payment structures, increasing governmental oversight and a growing focus on population-based health management). Setting aside dedicated time and an appropriate forum for decision-makers to meet becomes essential. Strategic retreats are one way for leaders to devote the necessary time to longer-range planning for their organizations. Retreats, when well-planned and well-facilitated, lead to an increased understanding of key issues, industry trends and changes and their possible effect on the entity, and enable organizations to develop actionable plans that will significantly impact their future direction. Coker Group, through our experienced team of advisors, helps organizations determine how to address these crucial issues and develop the strategic plans that drive a forward-thinking business model.

Coker uses an organized, systematic approach to collaborative strategic planning that results in a well-developed plan for the future of the entity. Our process includes the following steps:

- *Before* the retreat, Coker prepares and provides to participants a selection of materials (e.g., articles, publications, etc.) as mandatory preparatory work. Coker also often completes analyses via in-person interviews or a web-based questionnaire prior to the retreat.
- *During* the retreat, Coker delivers education, shares best practices from our extensive nationwide experience and facilitates discussions, including vetting all of the relevant issues. Coker's team ensures participants will engage actively and thoughtfully in all aspects of the retreat.
- *After* the retreat, Coker prepares a summary of the key decisions, along with our conclusions, recommendations, and next steps.

Typical two-day retreat session encompasses:

- Day One:
 - Provide education about the healthcare industry, current trends and expected developments at the national, regional and local level
 - Present applicable case studies to provide framework for discussion
 - Outline major issues for discussion by attendees during the remainder of the retreat
- Day Two:
 - Dissect key issues identified during on-site interviews and/or the web-based questionnaire (or otherwise outlined before the meeting)
 - Memorialize goals of the organization and recommendations for future actions
 - Summarize key decisions from the day and build consensus among the group

Coker-facilitated strategic retreats:

1. Provide a forum for education across a range of constituents
2. Identify the organization's current strategic, tactical, and operational issues
3. Vet crucial issues that require discussion, surfacing, and/or correction
4. Assess strategies for both the short- and long-term success of the organization
5. Conclude with development of a consensus-driven plan that fully engages the organization in its own future well-being

Coker's proven facilitation process provides a 360-degree view of your organization's challenges and opportunities. By using a structured approach to lead the discussions during the retreat, our facilitators can help your decision-makers understand the problems, discuss the issues, and develop the strategies for addressing your current and prospective pressing matters. We apply our expertise and insights across our functional advisory areas--Strategy and Operations, Finance, Technology, and Executive Search--to tackle your challenges holistically and to help you plan for your organization across all departments. Let our team assist with a strategic retreat for your organization to make the best use of your leaders' time based on informed decision-making.