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***LEE MANAGEMENT SERVICES, LLC***  
 STRATEGIC AND PLANNING CONSULTATIONS SINCE 1987

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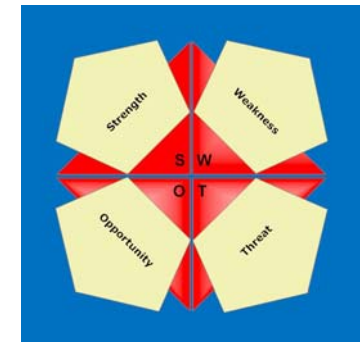
***LMS ALLIANCE***  
 ASK FOR ABOUT THE LMS DIRECTORY

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**STRATEGIC PLANNING**  
 And  
**EXECUTION**



# STRATEGIC AND PLANNING CONSULTATIONS SINCE 1987

**Planning Services.** Our experience has taught us that no two organizations are alike, the planning process employed to facilitate development of your organization's vision and strategies has to be geared toward your particular market, culture, infrastructure, operating processes, and leadership style. Therefore, whether LMS employs a bottom up, a top down, or multi-level planning process it is designed to work within your organization's organizational alignments and processes.

LMS facilitates the strategic planning process and then links the resulting vision and strategic goals to implementation objectives for execution. LMS strategic planning programs result in goals and objectives that are linked to financial and operational outcomes.

This brochure identifies specific LMS processes common to planning or marketing management engagements. However, there is a lot of variation in how organizations use LMS resources to pursue their planning and execution needs.

## DISCOVERY

The first step is to identify the role of LMS within the organization's management/planning team?

- a. identify key strategic and marketing management products and services needed by the organization — is it to be a holistic or unbundled service and support approach?
- b. get a feel for the organization's culture, leadership style, and expected results — in short, identify the parameters,
- c. generate a detailed work plan for the role that LMS is to perform and identify the broad information (historical and projected) requirements for the consult.

## COMMON PLANNING COMPONENTS AND PROCESSES

LMS Strategic consultations are flexible. LMS can provide a complete solution, unbundled components, or simply facilitation.

### Strategic Planning Process Continuum

- Step 1: Data Collection and Key Informant Interviews
- Step 2: Market Environment and Position Analysis
- Step 3: SWOT Analysis
- Step 4: Development of Vision and Organizational Wide Strategic Goals
- Step 5: Development of objectives, measures, targets, and actionable initiatives for Implementation and operational alignment. LMS utilizes a Balanced Scorecard and strategic mapping approach as the means for identifying outcome and performance measures to be used for monitoring progress. LMS can modify the Balance Scorecard to accommodate Studer's Five Pillars of Excellence.



### Strategic Review & Management Process

Review and management meetings will be held to disseminate findings and to provide oversight during the entire planning continuum. Meeting frequency and focus will be determined by the scope and intensity of the planning consult. The following meetings are suggested:

- ◆ Quantitative and Qualitative Findings
- ◆ Executive Planning Council Vision & Strategy Retreat
- ◆ Management Council Balance Scorecard Development Retreat
- ◆ Governing Board/Medical Staff Presentations
- ◆ First Year: Quarterly Outcome and Performance Review



### ASK FOR THE LMS ALLIANCE BROCHURE

Lee Management Services' Alliance is an alignment of healthcare consultants who work on a multi-disciplinary basis to find solutions. The complexity of the health care environment requires solutions that are formed from in-depth experience, knowledge, and from the merging of diverse professional disciplines. Each LMS Alliance Consultant has over 25 years of administrative, clinical, and consulting experience in their field of expertise.

REFERENCES ARE AVAILABLE  
UPON REQUEST