



Oncology Nursing Society  
**Leadership Development Institute**

# Planning and Moving Ideas into Action: Your Strategy for Success

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# Achieving Success

- Strategic Thinking
- Strategic Planning
- You



# Why Plan

Planning is bringing the future into the present so that you can do something about it now.

Alan Lakein



# Strategic Thinking

Strategic planning is worthless -  
unless there is first a strategic  
vision.

John Naisbitt



# Strategic Thinking

Capturing and using what you learn from all sources and synthesizing that into a vision or direction the “business” should pursue.

Maximizes the possibilities.



# Strategic Thinking

Without leaps of imagination, or dreaming, we lose the excitement of possibilities. Dreaming, after all, is a form of planning.

Gloria Steinem



# What Strategic Thinking Is

- A process for engaging in critical thought.
- A tool for surfacing and addressing assumptions.
- A structure for communication and debate.



# Communication & Debate

*As a rule of thumb, involve everyone  
in everything.*

Tom Peters



# Think Strategically

- Ask questions.
- Listen more, talk less.
- Seek out diverse perspectives.
- Reflect - step back from the daily routine.
- Get on the balcony.



Ballroom Floor



Balcony



# Scenarios from Two Perspectives

## Ballroom Floor

- My job responsibilities
- Patient with a fever
- Low census shift

## Balcony

- Trends in APN roles
- A cluster of children with FUO
- Seasonal variations in patient volume



# Strategic Planning

Plans are nothing; planning is everything.

Dwight D. Eisenhower



# Strategic Planning

The process for defining organizational objectives, implementing strategies to achieve those objectives, and measuring the effectiveness of those strategies.

Aligns with the vision and mission of the organization.



# Stages of Strategic Planning

- Situation Analysis (SWOT)
  - organizational review (mission, vision)
  - external assessment
  - internal assessment



# SWOT Analysis

## STRENGTHS

- Capabilities of self and/or colleagues
- Resources available

## WEAKNESSES

- Gaps in capabilities
- What needs to change

## OPPORTUNITIES

- What opportunities are available
- Interesting or new trends

## THREATS

- Environmental or seasonal
- Competing timelines or projects



# Stages of Strategic Planning

- Strategic Direction
  - future strategic profile
  - key strategies
  - Alternatives
  
- Strategy Formulation
  - establish goals and objectives



# Stages of Strategic Planning

- Action Planning
  - implementation plan
  - actions required
  - timeframe
  - priorities



# Participants in Strategic Planning

Great discoveries and achievements  
invariably involve the cooperation of  
many minds.

Alexander Graham Bell



# Putting Plans Into Action

- Nurses turn ideas into action – done daily in patient care
- Nursing process is the system we use to make this happen



# Project Management

- Project management has been around since ancient times
- Project management occurs daily within organizations for both large and small projects
- Most of us use project management skills in daily life
- Project management has distinct phases



# Project Phases and Life Cycle

- Phase 1 – Project **definition** phase
- Phase 2 – Project **planning** phase
- Phase 3 – Project **execution**
- Phase 4 – Project **close out**



# Phase 1 – Defining the Project

- Projects must be defined clearly
- Project definition will be translated into a Project Charter
  - Project and scope
  - High level outcomes
  - Fit to strategic plan
  - Business rationale



# Phase 1 - Project Stakeholders

- Project manager
- Project sponsor or champion
- Core project team
- Customer / Recipient of Project Outcomes
- Any vested/ interested stakeholder
- Functional Managers



# Phase 1 – Defining the Project

AKA “How am I going to do this?”

- Write goals for project
  - Breaking down the component parts
  - Avoid gaps and overlaps
- Hierarchy
  - Rank order tactics/activities needed to complete task
- Special situations
  - How to revise the plan
  - How to manage unknown issues/situations



# Phase 1 – Criteria for Goal Writing

Goals must be:

- **S**pecific
- **M**easurable
- **A**ttainable/Achievable
- **R**ealistic
- **T**ime-Limited



# Phase 1 – Criteria for Goal Writing

Goals must be:

- Specific
- Realistic
- Define time commitment
- Measurable
- Agreed upon by project team
- Define authority or responsibility



# Phase 1 – Defining the Project

## Estimating Resource Requirements

- Skills/People
  - Identify skills and knowledge needed to perform your project
  - Specify people to work on each activity
- Time
  - Determine how much effort they will have to invest
  - Determine how they will invest time along with other work assignments
- Financial



# Phase 1 – Defining the Project

## Statement of Work or Project Plan

- Formal project management document that established expectations and agreements about the project
- It is not a contract
- Clarifies responsibilities and working relationships between project stakeholders



# Phase 1 - Project Plan Elements

1. Project Title
2. Project Summary
3. Project Assessment
4. Project Design
5. Project Evaluation
6. Impact



# Phase 1 - Project Plan

Project Title - brief but descriptive

## Project Design

1. **Brief description**
2. **Outcome or objectives of the project**
3. **Target audience**
4. **What is the significance of the project**
5. **What are the risks and/or rewards**



# Leadership in Strategic Planning

What we do  $\neq$  Results we get

What we do + **Who** we are =  
Results we get



There are two classes of people in the world  
- those who take the best and enjoy it  
and those who wish for something better  
and try to create it. The world needs the  
appreciation of the first and the  
discontent of the second.

Florence Nightingale

