Strategic Planning for NPCs
Michele Packard-Milam, CAE
Session Objectives

- Introduce a simple, effective strategic planning process
- Learn to focus resources, reduce waste and improve outcomes
- Consider ways to create a strategic plan in the NPC environment
Why Bother with a Strategic Plan?
Strategic Components

- Mission/Vision Statements
- SWOT
- Strategic Plan
- Budget
Mission Statement: What You *Do* or What You *Create*

XYZ offers (what kind of) services to (segments of) community in the (geographic/category) area.
Strategic Plan
Process

- SWOT
- Goals
- Strategies
- Tactics
- Action Plan
- Strengths
- Weaknesses
- Opportunities
- Threats
Strengths

- What is your organization good at?
- What programs work well for you?

- What kind of business comes easiest?
- What are your best segments?
Strengths

- Note organizational strengths
- Think staff, resources, member base, programs, talents, points of difference
Weaknesses

- What mistakes are made repeatedly?
- What has caused projects to fail?

- What types of programs are most difficult?
- What mistakes have been made recently?
Where can you grow?
Threats

- What external events could halt your plans?
  - Focus where you have influence
  - Look at specifics in the economy
  - Consider natural disasters
PRIORITIZING

➢ Assign dots to the 10 most important items
➢ Work across entire SWOT

THEN...
➢ Make note of the *business areas of focus* where most priorities appear
TOP LEVEL GOALS

- Revenue/Reserves
- Employee Hiring/Retention
- Clinical Trial Management
- Grant Development
- Investigator Development
- Product Mix
- Professional Development
TOP LEVEL GOALS

- Goal statements
- One per area of focus
- Focus on ‘what’... not ‘how’
- Long view - 3 years
NPCX has a wide range of clinical trials, grants and research projects, spanning many disease areas.

NPCX manages a robust number of grants, run by a large roster of investigators.
EXAMPLE STRATEGIES

Clinical Trial Management
- Consistently meet or exceed recruitment goals
- Minimal protocol deviations
- Efficient management of regulatory systems
- Highly respected, popular research site
## Strategic Action Calendar

- A digest of action items written by calendar quarters
- Drawn directly from your strategies
- Attach to management meeting agendas
- Update quarterly or more often
- Treat as a living document
- Helps keep team tied to strategic plan

<table>
<thead>
<tr>
<th>Q1 2023</th>
<th>Q2 2023</th>
<th>Q3 2023</th>
<th>Q4 2023</th>
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<tbody>
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# Strategic Action Calendar

<table>
<thead>
<tr>
<th>Area of Focus</th>
<th>Q1 20</th>
<th>Q2 2012</th>
<th>Q3 2012</th>
<th>Q4 2012</th>
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</thead>
<tbody>
<tr>
<td>(Research Production)</td>
<td>&gt;Action item &gt;Date &gt;Driver</td>
<td>&gt;Action item &gt;Date &gt;Driver</td>
<td>&gt;Action item &gt;Date &gt;Driver</td>
<td>&gt;Action item &gt;Date &gt;Driver</td>
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<tr>
<td>(Staff Development)</td>
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<td>&gt;Action item &gt;Date &gt;Driver</td>
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<tr>
<td>(Hiring and Retention)</td>
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## Strategic Action Plan Example

<table>
<thead>
<tr>
<th>Strategy</th>
<th>Next Step</th>
<th>Driver</th>
<th>Due Date</th>
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</thead>
<tbody>
<tr>
<td>Market research opportunities to medical center community</td>
<td>&gt;Develop list of recipients</td>
<td>ED</td>
<td>Q1 FY23</td>
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<tr>
<td></td>
<td>&gt;Begin sending emails as opportunities arise</td>
<td>ED</td>
<td>Ongoing</td>
</tr>
<tr>
<td>Explore additional opportunities with sponsors</td>
<td>&gt;Begin building relationships with current sponsor medical liaisons</td>
<td>ED/Grant Manager</td>
<td>Start Q1 FY23/Ongoing</td>
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<tr>
<td></td>
<td>&gt;Invite medical liaisons for site tours</td>
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Understand Your Revenues

- Total revenues
- Percent of total recruitment
- Income vs labor costs
- Average revenue per project
- Average revenue per disease area
- Average revenue per PI
- Total revenue per coordinator
- Product mix
Creating a Strategic Plan in the NPC Environment

- **Challenges**
  - Difficult to get Board for full day
  - Some Board members won’t see the need/unwilling to invest the time

- **Workarounds**
  - Consider task force
    - 2-4 Board members/stakeholders
  - Admin staff creates draft for Board input
  - Work on sections progressively
Plan time to work **ON** your business, not just **IN** your business

- Recognize and address strengths and weaknesses
- Choose your goals
- Focus team energy
Thank you!

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