

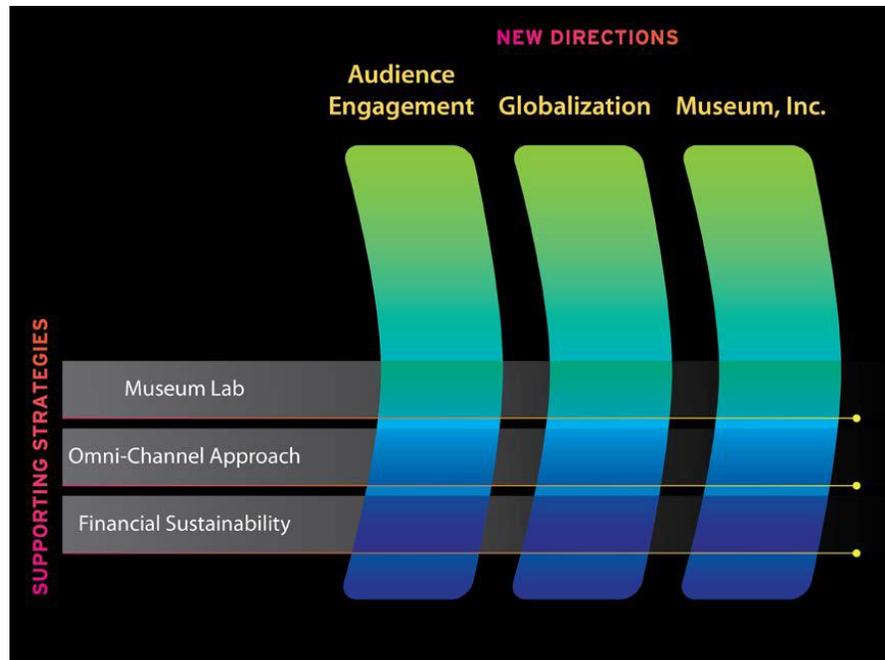


OUR SERVICES – STRATEGIC PLANNING

OPG believes a strategic plan is often the answer to more than just a need for a new vision or new product line; a good strategic plan, and the process to create it, can provide a multitude of benefits for your organization – from vision and mission clarification to environmental scans and benchmarks – at OPG we pull from our extensive roster of analytical tools and planning methodologies to create the best process for your organization.

Benefits you can expect from our strategic planning process include...

- Vision or mission clarification
- Breakthrough ideas to radically transform the direction of the organization
- Iterative goals to move the basic functions of the organization forward
- “Meta-Metrics”™ that measure success for the entire organization



CUSTOMIZED PLANNING PROCESSES – OPG’S SIGNATURE APPROACH

Every organization needs a customized strategic planning process – that’s why we take 18 different factors into account and utilize a diverse array of models when designing a strategic planning process for our clients. Some of the process design factors we take into consideration include size of the organization, experience with planning, timing of most recent plan, staff and leadership expertise, and recent changes in the organization’s environment.

“OPG’s planning process provided us with a clear sense of direction and helped us make some hard choices as a team.”

Models we use include...

- ✓ **Balanced Scorecard**
- ✓ **Porter’s Five Forces**
- ✓ **Hypothesis Testing**
- ✓ **Scenario Planning**
- ✓ **Meta-Metrics™**

WHY OPG?

Our work comes through long-term relationships and referrals because of the depth of understanding, experience, and intellectual vigor we bring to every engagement. OPG believes it is possible to create well-run organizations in which employees understand the complexities of organizational life and are productive contributors within those constraints. Our work is done in the context of relationships, which involves working with your organization to ensure continued monitoring, discussion, and implementation of new ideas.



OPG's IMPACT: Case Study – Health Associates

– *The Strategic Challenges of Planning for Integration* –

How to reboot engagement when you're growing fast – Health Associates is a private sector healthcare consortium owned by physicians. Since its inception in 2004, Health Associates has grown through the acquisition of medical clinics and hospitals, providing partner physicians with the opportunity to essentially own and grow their own medical and surgical programs.

A core group of four executives dealt with **the strategic challenges of integrating this assortment of medical organizations**, while providing high quality patient care, and keeping partner physicians happy.

Lisa O., at the time the President of Health Associates, realized that such closely-held decision making was not sustainable in the rapidly growing company. It exhausted the core team, and disenfranchised the many talented people in the organization who wanted to play a greater role.

Lisa asked OPG Partner, Laura Freebairn-Smith, whom she had known at Yale, to assist with a process that would change the dynamic.

"I saw this as more about culture development or organizational behavior than growth. It was about getting the most out of our people, attracting the right people, creating an engaged and sustainable workforce."

What started as an organizational development exercise evolved into a broader balanced scorecard initiative. OPG collaborated with Health Associates to design a planning process uniquely suited to that organization's fragmented structure and multiple stakeholders. Working with teams over 4-5 months, OPG helped Health Associates pull this work together into a Strategic Destination Map. Through the Strategic Destination Map, Health Associates developed a deep, shared agreement on their values – compassion, attitude, respect, excellence, and service (C.A.R.E.S.) that brought new alignment in expectations. As Lisa recalls, "it gave us a shared vocabulary, so we were able to have real discussions about everything from behavior to financial metrics." The C.A.R.E.S. values also formed the foundation for a new training program for managers, and for broader investments in becoming a "learning organization".

The process involved the teams which would take ownership of key issues so the core "brain trust" executives were finally able to step back, allowing others to take the lead. ***"This was creating a new culture from the bottom up, and people were excited that they could make a greater contribution."***



"THE PROCESS WAS TERRIFIC. IT WAS THE FIRST TIME WE ENGAGED EVERYBODY ON STAFF, INCLUDING CORPORATE AND FIELD OFFICES, THE FIRST TIME WE REALLY SAT DOWN AND DISCUSSED WHERE WE WERE GOING AND WHAT WAS IMPORTANT. WHAT WERE OUR VALUES? WHAT DID IT MEAN TO BE SUCCESSFUL? SURE, WE HAD GROWN, BUT WE DIDN'T REALLY TURN INTO A COMPANY UNTIL LAURA CAME ALONG."

Lisa O., Health Associates